

Heartwood Charter School

Agenda for the Meeting of the Heartwood Charter School Board of Directors

Location: 170 Liberty School Road, Petaluma, CA 94930

Call in location: 55 Fire Rd, Woodacre, CA 94973

The meeting may be joined by phone: [\(US\) +1 312-626-6799](tel:+13126266799) Passcode: 088229

Or by video conference

Join Zoom Meeting: <https://us06web.zoom.us/j/86186021403?pwd=pb3AhKLSWgJPOICvAXWnhaXeaMCCBd.1&jst=2>

Tuesday June 24, 2025

9:30 AM Public Session

Call to Order

- I. Roll Call
- II. Regular Meeting
 - A. Agenda Adjustments and Approval
- III. Correspondence
- IV. Public Comment
- V. Reports and Information
 - A. Director's Report
 1. Staffing
 2. Academics
 - B. Finance
 1. Budget Report
- VI. Action Items
 - A. The Board will consider the personnel actions and approve, defer or agree to study further.
 - B. The Board will consider opening currently closed Bothin Program classes and approve, defer, or agree to study further.
 - C. The Board will consider the Staffing Plan for 2025-26 and approve, defer or agree to study further.
 - D. The Board will consider the Local Control and Accountability Plan (LCAP) and Budget Overview for Parents for the 2025-26 school year and approve, defer or agree to study further.
 - E. The Board will consider the EPA Spending Plan for 2025-26 and approve, defer or agree to study further.
 - F. The Board will consider the Art and Music in Schools (Prop 28) Annual Certification for 2024-25 and approve or defer.
 - G. The Board will consider the Art and Music in Schools Spending Plan for 2025-26 and approve, defer or agree to study further.
 - H. The Board will consider the Executive Director contract and salary for 2025-26 school year and approve, defer or agree to study further.
 - I. The Board will consider the proposed Budget for the 2025-26 school year and approve, defer or agree to study further.
 - J. The Board will consider the revised Enrollment Limits, Priority, and Timeline Policy and approve, defer or agree to study further.
 - K. The Board will consider the Instructional Continuity Policy and approve, defer, or agree to study further.
 - L. The Board will consider the Title XI Harassment, Intimidation, Discrimination and Bullying Policy and approve, defer or agree to study further.
 - M. The Board will consider the revision to the School Calendar for 2025-26 and approve, defer or agree to

study further.

- N. The Board will consider the Board Meeting Calendar for 2025-26 and approve, defer or agree to study further.
- O. The Board will consider the revised Employee Handbook and approve, defer, or agree to study further.
- VII. Consent Items
 - A. Contract with Liberty Elementary for School Nurse.
 - B. Contract with Liberty Elementary for Psychologist.
- VIII. Board Discussion – this time is reserved for Board members to address colleagues and staff about matters they believe need study or action. The President will direct what action he or she feels should be taken on any item introduced by a Board member.
 - A. Summer Communication
 - B. Aftercare Update
 - C. Renewal
 - D. School Initiative for Improvement in Discipline and Safety
 - E. School initiative for Social and Emotional Development
 - F. School initiative for Administrative Development
- IX. Closed Session
 - A. Public Employee Performance Evaluation (Gov. Code section 54957(b)(1).)
- X. Open Session
- XI. Action Taken in Closed Session
- XII. Dates and Future Agenda Items conditions
- XIII. Adjourn

Bothin Class Sizes 2025-26

1. The Board will consider opening 7th grade to two siblings of currently enrolled students. The enrollment for this grade will be frozen thereafter. This is an impacted class with current enrollment of 14 with 4 pending, plus 1 student of an employee. The class has a new teacher. Steering is recommending this addition.

Staffing Plan 25-26
5/30/2025

Bothin Faculty

		New or Returning	24-25 Assignment	FTE	Overall Exper Yrs	Waldorf Exper Yrs
Hallal	Erin	Returning	Lead K	1.00	10.00	9.00
Lalande	Emily	Returning	Lead K	1.00	6.00	10.00
Meri	Kerin	Returning	1	1.00	11.00	11.00
Stapp	Zoe	Returning	2	1.00	1.00	1.00
Harris	Tiffany	Returning	3	1.00	11.00	10.00
Pironti	Sara	New	4	1.00	8.00	8.00
Brillault	Katie	Returning	5	1.00	18.00	4.00
Ostertag	Casey	Returning	6	1.00	10.00	6.00
Ris	Sara	New Assgnt	7	1.00	0.00	3.00
Gross	Jason	Returning	8	1.00	38.00	39.00
				10.00		
Howard	Zana	Returning	K Lead Asst	0.00	18.00	18.00
Krummheuer	Heidi	Returning	K Asst	0.00	13.00	5.00
Espinoza	Eli	New	2nd Asst	0.80	6.00	0.00
Loftin	Michelle	Returning	Grades Asst	0.80	9.00	6.00
Adee	Carol	Returning	Music	0.55	21.00	
Jimenez	Christina	New	Language	1.00	4.00	0.00
Buller	Lily	New	Handwork	0.00	3.00	2.00
Nielsen	Spencer	Returning	Outdoor	0.30		
McNeely	Caitlin	Returning	Outdoor	0.30		
Baehr	Skeydrit	Returning	Dance/Mvmnt	1.00	30.00	30.00
Hiller	Haila	Returning	Blocks	0.10	3.00	2.00
Williams	Sharon	Returning	Blocks	0.25	16.00	16.00
Vollmer	Rebecca	Returning	ACT Teaching	0.00	6.00	9.00
				5.10		

ISP Faculty

		New or Returning	24-25 Assignment	FTE	Gen Teaching Exper Yrs	ISP Teaching Exper Yrs
Wilkerson	Alejandra	Current	CST	1.00	23.00	7.00
McKinney	Amber	Current	CST	1.00	10.00	5.00
Cloud	Angela	Current	CST	1.00	9.00	6.00
Hartley	Melissa	Current	CST	1.00	14.00	4.00
Palmgren	Pamela	Current	CST	1.00	15.00	14.00
Maas-Howard	Talia	Current	CST	1.00	11.00	5.00
Prescutti	Kelly	Current	CST	1.00	14.00	7.00

Kreinberg	Scott	Current	CST	1.00	24.00	5.00
Egan	Terry	Current	CST	1.00	16.00	9.00
Mayberry	Kit	Current	CST	1.00	22.00	20.00
Martin	Julianna	Current	CST	1.00	4.00	3.00
Darlington	Kimberly	Current	CST	1.00	15.00	9.00
Lawrence	Rachel	Current	CST	1.00	11.00	3.00
Klaus	Ashley	Current	CST	0.70	18.00	3.00
Gregg (Reading)	Tammy	Current	CST TOSA	1.00	25.00	2.00
Howell (Math)	Julianna	Current	CST TOSA	1.00	16.00	2.00
Hope	Pauline	Current	CST	1.00	12.00	2.00
McEvoy	Andrea	Current	CST	1.00	6.00	2.00
Riley (Reading)	Emily	Current	CST TOSA	1.00	9.00	2.00
Ingraham	Ann	Current	CST	0.70	11.00	1.00
Rocca (Specialist)	Danna	Current	CST TOSA	1.00	25.00	1.00
Mackintosh	Susannah	Current	CST	1.00	10.00	10.00
Morbitz	Janna	Current	CST	1.00	22.00	1.00
(Open)		New	CST	1.00		

23.40

SPED Staff

		New or Returning	Assignment	FTE	Overall Exper Yrs	SPED Exper Yrs
Watterson	Jeremiah	Current	Ed Spec	1.00	12.00	8.00
Knepper	Shelley	Current	Ed Spec	1.00	29.00	29.00
Goren	Julie	Current	Lead Ed Spec	1.00	13.00	8.00
Rodriguez	Jolene	Current	Counselor	1.00	13.00	13.00
Geithman	Kristy	New	Counselor	1.00	7.00	4.00
Sheffield	Elizabeth	New	Ed Spec	1.00	15.00	15.00
Izaba	Ann-Marie	New	Ed Spec	1.00	20.00	18.00
(Open)		New	Ed Spec	1.00		

8.00

Operations Staff

		New or Returning	Assignment	FTE	Overall Exper Yrs	Assgt (mo)
Capps	Heather	Returning	Ops Asst	1.00	7.00	12.00
Figueroa	Corey	Returning	Ops Asst	1.00	11.00	12.00
Figueroa	Joey	Returning	Ops Asst	1.00	8.00	12.00
Christensen	Nichole	Returning	Ops Asst	1.00	3.00	11.00
Garcia	Pilar	Returning	Office Admin	0.85	9.00	11.00
Bieniek	Adam	Returning	Office Admin	1.00	7.00	11.00
Baquerizo	Laura	New	Office Admin	1.00	10.00	11.00

6.85

Administration

		New or Returning	Assignment	FTE	Overall Exper Yrs	Admin Exper Yrs
Felton-Priestner	Stephanie	Returning	Exec Dir	1.00	20.00	7.00
Deyden	Heather	Returning	Asst Dir	1.00	6.00	7.00
Lemesh	Tamara	Returning	Asst Prin	1.00	14.00	3.00
				3.00		

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Heartwood Charter School

CDS Code: 49 70797 0139568

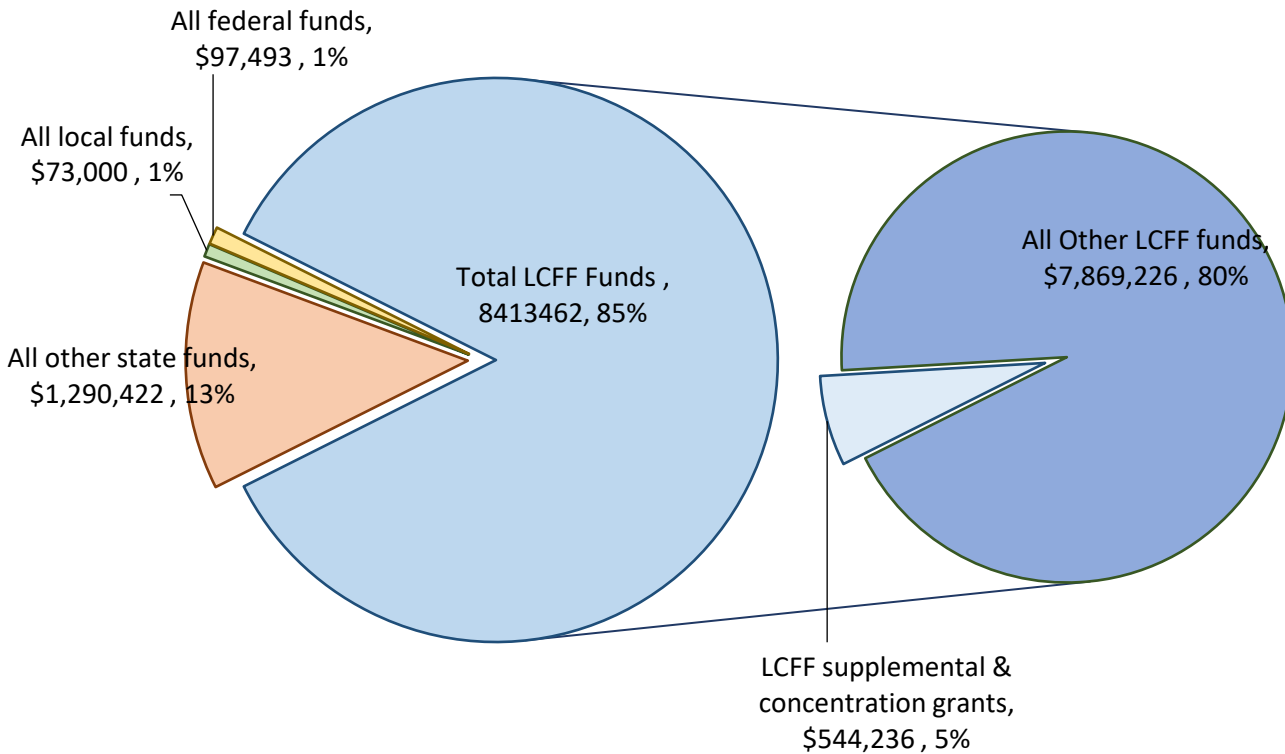
School Year: 2025-26

LEA contact information: Stephanie Felton-Priestner

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 2025-26 School Year

Projected Revenue by Fund Source

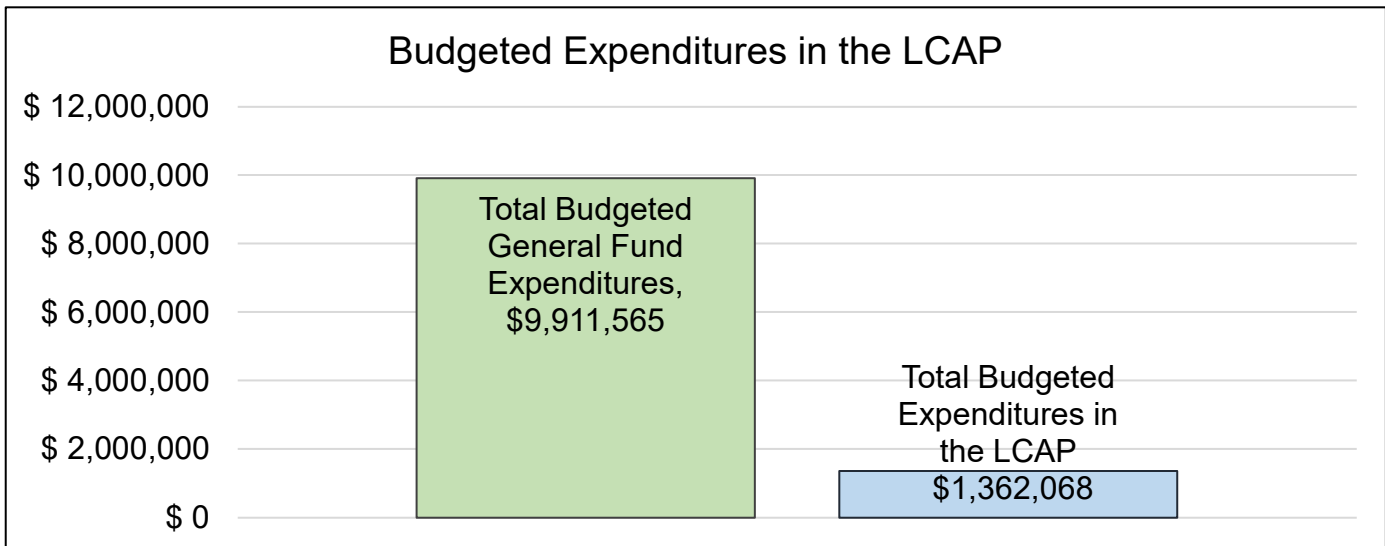


This chart shows the total general purpose revenue Heartwood Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Heartwood Charter School is \$9,874,377.00, of which \$8,413,462.00 is Local Control Funding Formula (LCFF), \$1,290,422.00 is other state funds, \$73,000.00 is local funds, and \$97,493.00 is federal funds. Of the \$8,413,462.00 in LCFF Funds, \$544,236.00 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 Heartwood Charter School plans to spend for 2025-26. 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: Heartwood Charter School plans to spend \$9,911,565.00 for the 2025-26 school year. Of that amount, \$1,362,068.00 is tied to actions/services in the LCAP and \$8,549,497.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

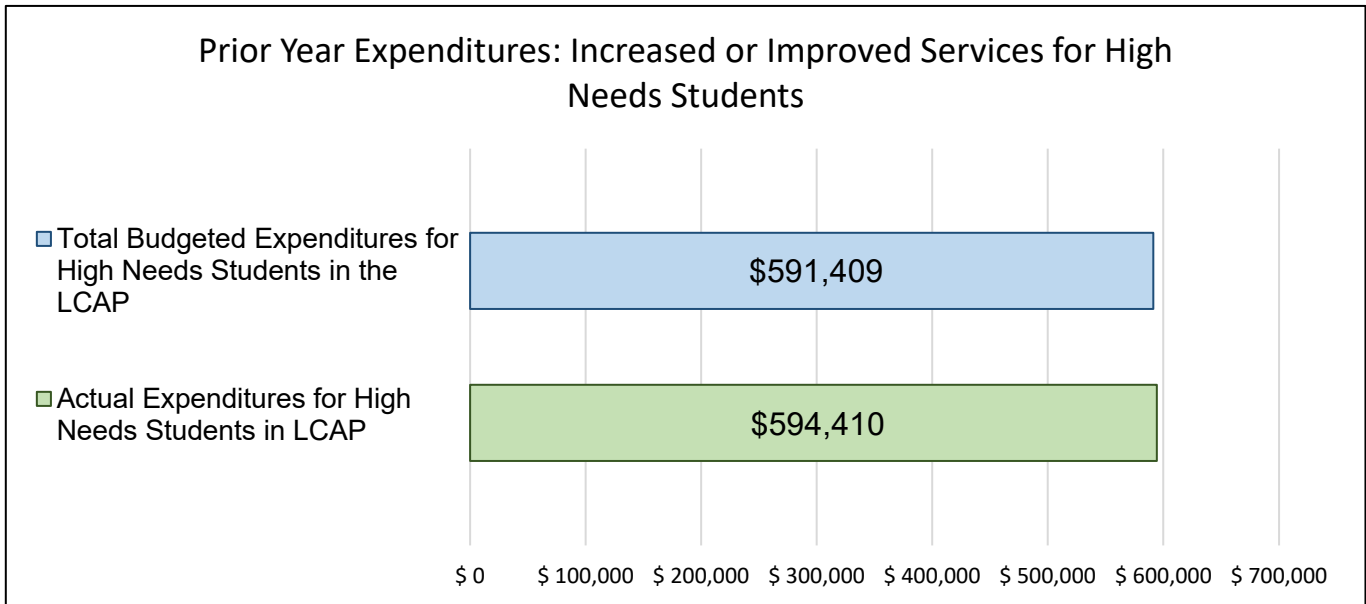
General Fund budget expenditures cover a broad spectrum of school costs, including a majority of faculty and staff salaries and benefits, Independent Study curriculum and supplies, Operating costs such as insurance, and Professional Services such as legal, accounting and audit. These are core expenditures

Increased or Improved Services for High Needs Students in the LCAP for the 2025-26 School Year

In 2025-26, Heartwood Charter School is projecting it will receive \$544,236.00 based on the enrollment of foster youth, English learner, and low-income students. Heartwood Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Heartwood Charter School plans to spend \$655,833.00 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 2024-25



This chart compares what Heartwood Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Heartwood Charter School 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 2024-25, Heartwood Charter School's LCAP budgeted \$591,409.00 for planned actions to increase or improve services for high needs students. Heartwood Charter School actually spent \$594,410.00 for actions to increase or improve services for high needs students in 2024-25.

LCFF Budget Overview for Parents: Data Input

Local Educational Agency (LEA) name:	Heartwood Charter School
CDS code:	49 70797 0139568
LEA contact information:	Stephanie Felton-Priestner
Coming School Year:	2025-26
Current School Year:	2024-25

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

Projected General Fund Revenue for the 2025-26 School Year		Amount
Total LCFF funds	\$	8,413,462
LCFF supplemental & concentration grants	\$	544,236
All other state funds	\$	1,290,422
All local funds	\$	73,000
All federal funds	\$	97,493
Total Projected Revenue	\$	9,874,377
Total Budgeted Expenditures for the 2025-26 School Year		Amount
Total Budgeted General Fund Expenditures	\$	9,911,565
Total Budgeted Expenditures in the LCAP	\$	1,362,068
Total Budgeted Expenditures for High Needs Students in the LCAP	\$	655,833
Expenditures not in the LCAP	\$	8,549,497
Expenditures for High Needs Students in the 2024-25 School Year		Amount
Total Budgeted Expenditures for High Needs Students in the LCAP	\$	591,409
Actual Expenditures for High Needs Students in LCAP	\$	594,410

LCFF Budget Overview for Parents: Narrative Responses

LCFF Budget Overview for Parents Narrative Responses Sheet

Required Prompt(s)	Response(s)
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	General Fund budget expenditures cover a broad spectrum of school costs, including a majority of faculty and staff salaries and benefits, Independent Study curriculum and supplies, Operating costs such as insurance, and Professional Services such as legal, accounting and audit. These are core expenditures and are not included in the Local Control and Accountability Plan.
A prompt may display based on information provided in the Data Input tab.	[Respond to the prompt here; if there is no prompt, a response is not required.]
A prompt may display based on information provided in the Data Input tab.	[Respond to the prompt here; if there is no prompt, a response is not required.]

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
Heartwood Charter School	Stephanie Felton-Priestner Executive Director	stephanie@heartwoodcharterschool.org 415-488-9572

Plan Summary 2025-26

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

The mission of Heartwood Charter School is to provide a supportive independent study learning environment in which students may choose a number of paths inspired by the whole child approach of public Waldorf education, including home study options. We seek to provide students with an unshakable sense of their connection to and relationship with the natural world and with each other, and by extension, the community of humanity. Our goal is to graduate students who are proficient in all core subjects, well-prepared to pursue further academic and personal goals, and motivated to make positive, ethical and creative contributions to their world.

The community is comprised of families that are committed to fostering a unique learning environment for their children. Some families are seeking an alternative to what they would term traditional public education, while others are parents of children who, for a variety of reasons, have not thrived in a classroom setting and are looking for another way to find public support for the education of their child.

The school is comprised of two independent study learning streams. One stream is traditional homeschool independent study, with an enrollment of 500 students, centered primarily in Sonoma County. This stream is comprised of wide variety of learning strategies, all of which are supported by credentialed teachers who approve the curriculum and content. The other learning stream is a Waldorf-inspired program of group instruction, with an enrollment of 170 students, centered in Marin County.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

This year we continued to improve our program of assessing and identifying potential learning gaps. Staffing additions and improved training, together with additional assessment tools yielded good results this year in identifying and addressing learning deficiencies across the program. The result was earlier identification and servicing of learning deficiencies, resulting in several successful learning improvements.

Academic results improved this year after the previous two years of lowered learning outcomes. Improvement of Academic results continues to be a strategic priority in the coming year. The addition of academic specialists in ELA and Math contributed to greater access to focused learning.

Dashboard indicators improved over prior years with indicators in green or blue in all categories except math in yellow. Subgroup results were similar, with orange results in some categories. Heartwood had no indicators or subgroups in red.

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.

In 2024-25, CAASPP scores showed results above average in both English Language Arts and Math. The results, though steadily improving over prior years, are prompting us to strive for further improvements.

Parent and faculty feedback identified a need for increased efforts to discover and address learning gaps. Again, this year, the school's own work with the students similarly showed a greater need for resources for servicing learning gaps and disabilities. For 2025-26 our plan will be to utilize informal assessments and utilize new assessment tools more widely where possible to better identify deficiencies and to apply resources to fill gaps.

LCAP Highlights

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

In response to observed and identified needs, the school intends to take several actions to improve our resources and processes for identifying and responding to learning deficiencies and disabilities.

- Make progress with a schoolwide Multi-Tiered System of Support and Response to Intervention (RTI) process to achieve a higher level of care for learning gaps and disabilities.
- Training for faculty and staff on MTSS and learning gap recognition.
- Continue teacher observation of students with needs, with prioritized small group instruction, tutoring, or other learning resources assigned to close learning gaps.
- Adding classroom assistants to create a greater level of care and support for learning difficulties, while allowing integrated learning.
- Adding dedicated specialists for both learning streams to oversee and monitor learning improvement action plans and improve academic results.

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.

Heartwood Charter has not been eligible for comprehensive support and improvement as defined by the State of California.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

N/A

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Heartwood consulted with community members to understand community concern throughout the 2024-25 school year. The School engaged in Board meetings, Parent Councils, Faculty Steering Committee meetings, open Q&A sessions, and class and parent meetings in order to offer input opportunities to a wide stakeholder population. Several parent-oriented meetings and sessions were conducted throughout the year, including every other week in the second semester, which offered the opportunity to a wide **parent** and **student** population to offer feedback. Weekly meetings with **faculty** and **administration** reviewed the status of learning and the student body. The **Parent Council** was invigorated this year after the pandemic disruption years, resulting in renewed **parent engagement** with bi-monthly meetings.

Consultation with individuals and parents representing the interests of students, including underserved groups, were performed by teachers in monthly progress meetings. In this program, teachers have regular one-to-one contact with families and are able to ask about specific needs as well as assess progress. These meetings occur at each learning period, or roughly monthly.

The needs expressed in these conversations (primarily concerns around access to technology, isolation / mental health, and especially additional academic support) have been included in expenditure plans as appropriate. Technology access is supported through distribution of computers primarily and hotspots are offered when requested. Isolation was addressed with expanded enrichment as well as school events and park days. Additional academic support is addressed in this Plan, in the form of additional progressive assessments and, when indicated, additional tutoring, curriculum or small group instruction.

A summary of the feedback provided by specific educational partners.

Parents in an independent study program tend to be oriented towards an autonomous approach to learning and may not offer as much feedback as may be expected of parents at an in-person program. Feedback from teachers echoed this possibly extending into learning disabilities influenced our decision to develop a schoolwide MTSS program to identify and manage learning gaps.

The UPC population provided feedback through surveys and during approximately monthly Learning Period meetings with parents and teachers. Much of the feedback centered around learning gaps and learning difficulties experienced over the past two years. This led to continuance of our program to frequently check progress and address learning gaps through the application of technology, curriculum or tutoring.

The EL and foster youth populations are too small to address as groups, but feedback obtained from individual families echoed that of other groups.

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

Feedback from teachers was clear that the learning deficiencies and isolation was in danger of extending into learning disabilities. This influenced our decision to develop a schoolwide MTSS program to identify and manage learning gaps. The needs Also, a plan was implemented where teachers checked student progress frequently and were able to apply for tutoring priority or additional learning funds and resources in order to make up for the learning deficiencies.

Goals and Actions

Goal

Goal #	Description
1	Create a highly trained and professional faculty and staff.

An explanation of why the LEA has developed this goal.

As a growing school, faculty and staff are comprised of various degrees of skill and experience. Some faculty are developing their credentials, and some may have gaps in their training backgrounds. A consistent and systematic program of training promises to create a team working together to sustain a strong curriculum and learning community.

State priorities 1 and 2

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2025-26
Number of lead teachers with clear credentials	75%	82%	84%	85%	88%
Attendance at faculty meetings and mentoring sessions	90% attendance at weekly faculty or mentoring sessions	92% of teachers will attend a minimum of 30 hours of mentoring on annual basis	92% of teachers will attend a minimum of 30 hours of mentoring on annual basis	80% of teachers attend a minimum of 30 hours of mentoring on annual basis	90% of teachers will attend a minimum of 30 hours of mentoring on annual basis
Completion of SpEd training, mandatory training, and other programmatic training	100% mandatory, 90% SPED, 60% programmatic	100% mandatory, 90% SPED, 90% programmatic	100% mandatory, 90% SPED, 90% programmatic	100% mandatory, 100% SPED, 90% programmatic	100% mandatory, 100% SPED, 90% programmatic

Actions

Action #	Title	Description	Total Funds	Contributing
1	MTSS Training	Train Faculty and staff in principles and methods of MTSS and RTI. Continue to work towards a school wide program to identify, assess and implement services for learning deficiencies	\$1,963	N
1	MTSS Training	Train Faculty and staff in principles and methods of MTSS and RTI. Continue to work towards a school wide program to identify, assess and implement services for learning deficiencies	\$1,037	Y
2	Assign in-house mentor for all faculty.	Assignment of a mentor colleague will provide support for newer staff or for closing skill gaps. Ongoing faculty growth will make this a priority again for the current year.	\$2,290	N
2	Assign in-house mentor for all faculty.	Assignment of a mentor colleague will provide support for newer staff or for closing skill gaps. Ongoing faculty growth will make this a priority again for the current year.	\$1,210	Y
3	Participate in programmatic training	Participation in specific academic and skills training will enhance staff competency and improve learning outcomes.	\$3,141	N
3	Participate in programmatic training	Participation in specific academic and skills training will enhance staff competency and improve learning outcomes.	\$1,659	Y

Goal Analysis for 2024-25

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.

Training and practical action of MTSS and RTI methods, where learning deficiencies were identified and addressed, was again successful. Training led to further improved identification and referrals. Additions to staffing and directed resources led to improved mitigation plans and the associated implementation.

The plans were again significantly challenged by the ongoing statewide shortage of qualified employees. Planned staff positions continue to be difficult to fill, stretching current staff under strain to service current students. Planned actions were partially fulfilled in the 2024-25 school year and will be continued in this plan for the 2025-26.

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.

Yearend actual expenditures are expected to be lower than when budgeted last year. Some unfilled staff positions led to a reduction in spending.

An explanation of how effective the specific actions were in making progress toward the goal.

The emphasis of the MTSS process schoolwide MTSS resulted in increased awareness and discovery of learning difficulties among the student population. The influx of new students created a strain on resources but was ultimately effective in discovering and planning paths towards resolution.

In-house mentoring of faculty registered significant success in engaging and elevating faculty contributions. Faculty-led steering committees furthered the advancement of academics, learning and business processes for our independent study program.

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.

The emphasis on informal assessments and resultant application of additional tutoring and academic supplements will be further emphasized this year.

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	Create a healthy, positive, and safe school environment for both students and families.

An explanation of why the LEA has developed this goal.

To effectively educate the population we hope to serve, we are working to improve student engagement, parent involvement and the overall school climate.

State priorities 3, 5 and 6

Measuring and Reporting Results

Metric	Baseline	2022-23 Outcome	2023-24 Outcome	2024-25 Outcome	Desired Outcome for 2025-26
Attendance	94% or greater	97% of available instructional time	96% of available instructional time	96% of available instructional time	96% or greater
Suspensions	Suspension rate under 2.5%	Suspension rate under 1%	Suspension rate under 1%	Suspension rate under 1%	Suspension rate under 1% Expulsion rate under 1% Chronic absence rate under 4%
Parent Conferences	90% attendance at parent conferences	90% attendance at parent conferences	90% attendance at parent conferences	90% attendance at parent conferences	95% or greater attendance at parent conferences
Facilities	Facilities in Good Repair	Facilities in Good Repair	Facilities in Good Repair	Facilities in Good Repair	Meet “Good Repair” standard where applicable
High School Graduation Rate	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students	NA – fewer than 11 students

Actions

1	Positive behavior program to improve social, emotional and academic outcomes.	Develop and integrate enrichment and social activities to address social and emotional aspects of academic process and integrate into a schoolwide process.	\$3,272	N
1	Positive behavior program to improve social, emotional and academic outcomes.	Develop and integrate enrichment and social activities to address social and emotional aspects of academic process and integrate into a schoolwide process.	\$1,728	Y
2	Parent conference schedule	Create a school calendar that provides and extended window during which parent teacher conferences can take place to maximize parent participation.	\$0.00	N

Goal Analysis for 2024-25

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.

The school climate improved significantly again this past year with more in person activities and a return to regularity of school events. Selected enrichment activities were expanded, including music, crafting, cooking, dance and outdoor education. School events were expanded to a full calendar of in-person school plays and events. A lively calendar of field trips drew parent engagement.

Group instruction programs returned to in-person learning where available, which aided attendance. Parent conferences continued with an in-person format, which continued to improve parent engagement.

Planned staff additions for literacy and math specialists to enhance specific learning were implemented as planned and expanded as qualified candidates became available. Tutoring and small group instruction via video conference were largely attended to capacity.

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.

Yearend 24-25 expenditures are expected to be higher than forecast at the end of last year's LCAP due to expenditures due to informal assessments and implementation of literacy and math specialists. School events and other in-person activities, including the Homeschool play made significant improvements in climate.

An explanation of how effective the specific actions were in making progress toward the goal.

The resumption of enrichment activities and classes proved to be enormously popular with students and parents, with much positive feedback.

In-house mentoring of faculty registered significant success in engaging and elevating faculty contributions. A faculty-led steering committee was formed and furthered the advancement of academics, learning and business processes for our independent study program.

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.

More emphasis towards social and emotional development will be integrated into the program in subsequent years.

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	Develop targeted intervention based on multiple measures to address any observed gaps in student learning for all applicable student subgroups including unduplicated students and students with exceptional needs, whether that be English language learners, racial/ethnic groups, socioeconomically disadvantaged students, homeless or foster youth. State priorities 4, 7, 8.

An explanation of why the LEA has developed this goal.

Faculty observations as well as significant feedback from all partner groups indicated a need to identify and address learning deficiencies. The distribution of deficiencies throughout the school population led us to create a system of widespread monitoring and support.

Measuring and Reporting Results

Metric	Baseline	2021-22 Outcome	2022-23 Outcome	Outcome for 2023-24	Desired Outcome for 2024-25
CAASPP results. Note test scores lag by one school year, due to availability of results. At the end of 23-24 the most recent results are from 22-23.	No data due to cancellation of testing during pandemic	47.6% of all students in ELA and 27% of all students in math, including subgroups scored Proficient or above on the statewide CAASPP test.	57% in ELA and 34% in math scored Proficient or above on Statewide CAASPP test.	55% in ELA and 38% in math scored Proficient or above on statewide CAASPP test.	At least 65% in ELA and 45% in math, for all students, including subgroups, at every grade level will score Proficient or above on the statewide CAASPP test.

Metric	Baseline	2021-22 Outcome	2022-23 Outcome	Outcome for 2023-24	Desired Outcome for 2024-25
Teacher observations of student progress	Students will demonstrate progress in at least one area of concern. Progress will be documented through multiple assessments.	Student progress was uneven during pandemic recovery year and limited data is available.	Greater consistency of results, including significant progress in ELA.	At least 85% of all students, including subgroups, progress one grade/skill level each academic year in at least one area of concern, as evidenced assessments and student portfolios.	At least 85% of all students, including subgroups, progress one grade/skill level each academic year in at least one area of concern, as evidenced assessments and student portfolios.
Completion of SpEd training, mandatory training, and other programmatic training	100% mandatory, 90% SPED, 60% programmatic	100% mandatory, 95% SPED, 85% programmatic	100% mandatory, 100% SPED, 90% programmatic	100% mandatory, 95% SPED, 100% programmatic	100% mandatory, 95% SPED, 100% programmatic
New IEP Assessment requests for continuing students	4.4% of enrollment	4% of enrollment	4% of enrollment	3% of enrollment	<2% of enrollment

Actions

Action #	Title	Description	Total Funds	Contributing
1	Increasing staff for detection of learning gaps	Add Special Education staff to detect learning gaps and deficiencies	\$177,342	N
1	Increasing staff for detection of learning gaps	Add Special Education staff to detect learning gaps and deficiencies	\$93,658	Y
2	Instructional assistants	Addition of instructional assistants to assist with identification of learning gaps and to support an inclusive learning environment	\$86,817	N
2	Instructional assistants	Addition of instructional assistants to assist with identification of learning gaps and to support an inclusive learning environment	\$45,850	Y

Action #	Title	Description	Total Funds	Contributing
3	Increased observation	Increased teacher observation, review and oversight for special needs and disadvantaged students	\$269,836	Y
4	Dedicated specialist	Hire a dedicated specialist to fill key learning deficiencies (Supplemented with Learning Recovery Emergency Block Grant funds)	\$313,841	N
4	Dedicated specialist	Hire a dedicated specialist to fill key learning deficiencies (Supplemented with Learning Recovery Emergency Block Grant funds)	\$165,745	Y
5	Small group instruction	Small group instruction and tutoring for students for special needs and disadvantages students	\$103,786	N
5	Small group instruction	Small group instruction and tutoring for students for special needs and disadvantages students	\$54,811	Y
6	Technology	Furnish Chromebooks, software and hotspots as needed for completion of academic activities	\$4,000	N
6	Technology	Furnish Chromebooks, software and hotspots as needed for completion of academic activities	\$4,000	Y
7	Instructional and Assessment software	Provide instructional software to disadvantaged students at no charge in order to enable completion of core academic curriculum at no cost.	\$7,319	N
7	Instructional and Assessment software	Assessment software for monitoring and analysis of academic progress, including learning augmentation and learning difficulties	\$3,000	Y

Goal Analysis for 2024-25

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.

While implementation of a formal MTSS system was not possible with staffing shortages, practical implementation of MTSS and RTI methods was effective in finding and addressing learning deficiencies. Effective training resulted in improved identification, and improved fiscal and staffing resources resulted in improved mitigation. Efforts to design and implement a schoolwide MTSS plan were again paused due to insufficient staffing.

Staff augmentation was moderately successful, though the implementation turned into staff reallocation due to staffing shortages. Redirection of staff to prioritize learning deficiencies had good success with the establishment of tutoring and group instruction programs. Economically disadvantaged students were given priority for tutoring and group instruction, and could also apply for special augmentation to their Instructional Funds to boost learning opportunities. Approved special augmentation plans were developed, approved and implemented under the oversight of their Certified Support Teacher.

Technology was distributed where needs were identified as required by their Certified Support Teacher.

While improving greatly, the plans were again challenged by the statewide shortage of qualified employees. Planned staff positions remain unfilled, though staff is adapting to adequately service current students. Portions of our actions were partially fulfilled and will be continued with this year's plan.

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.

Yearend expenditures are expected to be moderately higher than forecast in last year's LCAP. While the development of a schoolwide MTSS and RTI program was muted by staffing shortages, much of the intended training was progressed, with overall expenses higher than planned. The result was that expenses exceeded last year's budget.

An explanation of how effective the specific actions were in making progress toward the goal.

The initiation of a schoolwide MTSS plan resulted in increased awareness and discovery of learning difficulties among the student population. The influx of new students created a strain on resources but was ultimately effective in discovering and planning paths towards resolution.

In-house mentoring of faculty registered significant success in engaging and elevating faculty contributions. A faculty-led steering committee was formed and furthered the advancement of academics, learning and business processes for our independent study program.

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 coming 2024-25 school year, a greater emphasis will be placed on identifying and mitigating specific learning deficiencies through teacher observations and assessments, including casual assessments. This method has been used for the past two years and has yielded a great degree of success. High school enrollment remained capped at a level that is manageable by existing staff.

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 2025-26

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$544,236	\$ 0.00

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
12%	0.00%	\$ 0.00	12%

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.

For actions that will be available to the whole school, priority will be given to address the needs of low-income, EL and foster youth. These actions were all developed with the UPC population in mind and will be delivered to that population as a first priority. Budget for these actions will not be depleted without ensuring there is not a need from the UPC students.

The primary goal for our actions is to make up for learning deficiencies, especially during the time of recovery from distance learning. Because of pandemic testing suspension, very little data is available from which to analyze our student body. We believe that the additional attention we plan to focus on learning progress for our UPC students will make a significant difference in closing any learning deficiencies.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

The overall plan was developed around learning deficiencies and the delivery of mitigation actions for the UPC students primarily. Many actions are directed solely at the UPC students, and where shared, resources will be prioritized for UPC students before the general population.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Not applicable, this LEA does not receive Concentration Grant funds.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	NA, district reporting only	NA
Staff-to-student ratio of certificated staff providing direct services to students	NA, district reporting only	NA

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.

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 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 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.

2025-26 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$ 1,238,448	\$ 116,838	\$ -	\$ -	1,355,286	\$ 1,315,386	\$ 39,900

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	MTSS Training for Staff	All	\$ 1,963	\$ -	\$ -	\$ -	\$ 1,963
1	1	MTSS Training for Staff	Low income, foster, EL	\$ 1,037	\$ -	\$ -	\$ -	\$ 1,037
1	2	Assign in-house mentor for all faculty	All	\$ 2,290	\$ -	\$ -	\$ -	\$ 2,290
1	2	Assign in-house mentor for all faculty.	Low income, foster, EL	\$ 1,210	\$ -	\$ -	\$ -	\$ 1,210
1	3	Participate in programmatic training	All	\$ 3,141	\$ -	\$ -	\$ -	\$ 3,141
1	3	Participate in programmatic training	Low income, foster FI	\$ 1,659	\$ -	\$ -	\$ -	\$ 1,659
				\$ -	\$ -	\$ -	\$ -	\$ -
2	1	Positive behavior program to improve social, emotional and academic outcomes.	All	\$ 3,272	\$ -	\$ -	\$ -	\$ 3,272
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Low income, foster, EL	\$ 1,728	\$ -	\$ -	\$ -	\$ 1,728
2	2	Parent conference schedule	All	\$ -	\$ -	\$ -	\$ -	\$ -
				\$ -	\$ -	\$ -	\$ -	\$ -
3	1	Increasing staff for detection of learning gaps	All	\$ 177,342	\$ -	\$ -	\$ -	\$ 177,342
3	1	Increasing staff for detection of learning gaps	Low income, foster, EL	\$ 93,658	\$ -	\$ -	\$ -	\$ 93,658
3	2	Instructional assistants	All	\$ 86,817	\$ -	\$ -	\$ -	\$ 86,817
3	2	Instructional assistants	Low income, foster, EL	\$ 45,850	\$ -	\$ -	\$ -	\$ 45,850
3	3	Increased observation	Low income, foster FI	\$ 269,036	\$ -	\$ -	\$ -	\$ 269,036
3	4	Dedicated specialist	All	\$ 237,382	\$ 76,459	\$ -	\$ -	\$ 313,841
3	4	Dedicated specialist	Low income, foster FI	\$ 125,366	\$ 40,379	\$ -	\$ -	\$ 165,745
3	5	Small group instruction	All	\$ 103,786	\$ -	\$ -	\$ -	\$ 103,786
3	5	Small group instruction	Low income, foster FI	\$ 54,811	\$ -	\$ -	\$ -	\$ 54,811
3	6	Technology	All	\$ 4,000	\$ -	\$ -	\$ -	\$ 4,000
3	6	Technology	Low income, foster FI	\$ 4,000	\$ -	\$ -	\$ -	\$ 4,000
3	7	Instructional and assesment software	All	\$ 9,781	\$ -	\$ -	\$ -	\$ 9,781
3	7	Instructional and assesment software	Low income, foster FI	\$ 7,319	\$ -	\$ -	\$ -	\$ 7,319
3	8	Additional Instructional Funds Grants	Low income, foster FI	\$ 3,000	\$ -	\$ -	\$ -	\$ 3,000

2025-26 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
\$ 9,558,362	\$ 584,469	6.11%	0.00%	6.11%	\$ 608,674	0.00%	6.37%	Total:	\$ 608,674
								LEA-wide Total:	\$ -
								Limited Total:	\$ -
								Schoolwide Total:	\$ 608,674

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	1	MTSS Training for Staff	No	Schoolwide			\$ -	0.00%
1	1	MTSS Training for Staff	Yes	Schoolwide	All		\$ 1,037	0.00%
1	2	Assign in-house mentor for all faculty.	No	Schoolwide			\$ -	0.00%
1	2	Assign in-house mentor for all faculty.	Yes	Schoolwide	All		\$ 1,210	0.00%
1	3	Participate in programmatic training	No	Schoolwide			\$ -	0.00%
1	3	Participate in programmatic training	Yes	Schoolwide	All		\$ 1,659	0.00%
							\$ -	0.00%
2	1	Positive behavior program to improve social skills	No	Schoolwide			\$ -	0.00%
2	1	Positive behavior program to improve social skills	Yes	Schoolwide	All		\$ 1,728	0.00%
2	2	Parent conference schedule	No	Schoolwide			\$ -	0.00%
							\$ -	0.00%
3	1	Increasing staff for detection of learning gaps	No	Schoolwide			\$ -	0.00%
3	1	Increasing staff for detection of learning gaps	Yes	Schoolwide	All		\$ 93,658	0.00%
3	2	Instructional assistants	No	Schoolwide			\$ -	0.00%
3	2	Instructional assistants	Yes	Schoolwide	All		\$ 45,850	0.00%
3	3	Increased observation	Yes	Schoolwide	All		\$ 269,036	0.00%
3	4	Dedicated specialist	No	Schoolwide			\$ -	0.00%
3	4	Dedicated specialist	Yes	Schoolwide	All		\$ 125,366	0.00%
3	5	Small group instruction	No	Schoolwide			\$ -	0.00%
3	5	Small group instruction	Yes	Schoolwide	All		\$ 54,811	0.00%
3	6	Technology	No	Schoolwide			\$ -	0.00%
3	6	Technology	Yes	Schoolwide	All		\$ 4,000	0.00%
3	7	Instructional and assessment software	No	Schoolwide			\$ -	0.00%
3	7	Instructional and assessment software	Yes	Schoolwide	All		\$ 7,319	0.00%
3	8	Additional Instructional Funds Grants	Yes	Schoolwide	All		\$ 3,000	0.00%

2024-25 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	\$ 1,135,563.00	\$ 1,152,942.00

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	MTSS Training for Staff	No	\$ 4,939	\$ 1,301
1	1	MTSS Training for Staff	Yes	\$ 2,561	\$ 674
1	2	Assign in-house mentor for all faculty.	No	\$ 3,293	\$ 1,646
1	2	Assign in-house mentor for all faculty.	Yes	\$ 1,708	\$ 854
1	3	Participate in programmatic training	No	\$ 3,161	\$ 954
1	3	Participate in programmatic training	Yes	\$ 1,639	\$ 494
				\$ -	\$ -
2	1	Positive behavior program to improve social, emotional and academic outcomes.	No	\$ 3,293	\$ 3,490
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Yes	\$ 1,708	\$ 1,810
2	2	Parent conference schedule	No	\$ -	\$ -
				\$ -	\$ -
3	1	Increasing staff for detection of learning gaps	No	\$ 242,328	\$ 167,646
3	1	Increasing staff for detection of learning gaps	Yes	\$ 125,672	\$ 86,941
3	2	Instructional assistants	No	\$ 6,331	\$ 100,326
3	2	Instructional assistants	Yes	\$ 3,283	\$ 52,029
3	3	Increased observation	Yes	\$ 306,690	\$ 301,848
3	4	Dedicated specialist	No	\$ 139,931	\$ 227,844
3	4	Dedicated specialist	Yes	\$ 72,569	\$ 118,160
3	5	Small group instruction	No	\$ 124,033	\$ 39,811
3	5	Small group instruction	Yes	\$ 64,324	\$ 20,646
3	6	Technology	No	\$ 4,000	\$ 4,006
3	6	Technology	Yes	\$ 4,000	\$ 4,897
3	7	Instructional and assesment software	No	\$ 9,844	\$ 9,875
3	7	Instructional and assesment software	Yes	\$ 7,256	\$ 5,121
3	8	Supplemental Instr Funds Grants	Yes	\$ 3,000	\$ 2,569

2024-25 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)
\$ 519,684	\$ 594,410	\$ -	\$ 594,410

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?
1	1	MTSS Training for Staff	No
1	1	MTSS Training for Staff	Yes
1	2	Assign in-house mentor for all faculty.	No
1	2	Assign in-house mentor for all faculty.	Yes
1	3	Participate in programmatic training	No
1	3	Participate in programmatic training	Yes
2	1	Positive behavior program to improve social, emotional and academic outcomes.	No
2	1	Positive behavior program to improve social, emotional and academic outcomes.	Yes
2	2	Parent conference schedule	No
3	1	Increasing staff for detection of learning gaps	No
3	1	Increasing staff for detection of learning gaps	Yes

3	2	Instructional assistants	No
3	2	Instructional assistants	Yes
3	3	Increased observation	Yes
3	4	Dedicated specialist	No
3	4	Dedicated specialist	Yes
3	5	Small group instruction	No
3	5	Small group instruction	Yes
3	6	Technology	No
3	6	Technology	Yes
3	7	Instructional and assesment software	No
3	7	Instructional and assesment software	Yes
3	8	Instructional Funds Grants	Yes

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)
0.00%	0.00%	0.00% - No Difference

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)
\$ -	\$ -	0.00%	0.00%
\$ 2,561	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ 1,708	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ 1,639	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ 1,708	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ -	\$ -	0.00%	0.00%
\$ 125,672	\$ -	0.00%	0.00%

\$	-	\$	-	0.00%	0.00%
\$	3,283			0.00%	0.00%
\$	306,690			0.00%	0.00%
\$	-	\$	-	0.00%	0.00%
\$	72,569			0.00%	0.00%
\$	-	\$	-	0.00%	0.00%
\$	64,324			0.00%	0.00%
\$	-	\$	-	0.00%	0.00%
\$	4,000			0.00%	0.00%
\$	-	\$	-	0.00%	0.00%
\$	7,256			0.00%	0.00%
\$	3,000			0.00%	0.00%
\$	-	\$	-	0.00%	0.00%

2024-25 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)
\$ 5,129,684	\$ 544,2364	0.00%	10.13%	\$ -	0.00%	0.00%	\$ 519,684.00	10.13%

Self-Reflection (Priority 6) – School Climate

This is the submission form for the local educational agency (LEA) coordinator (school district, charter school, and county office) to complete on the local performance indicator for school climate (Priority 6).

School Response

The school climate improved somewhat in response to repeated in-person activities, including parent-attended events. Selected student group activities were expanded to include art, music, crafting, cooking, and hiking. School events were expanded with outdoor in-person school plays and events.

A full field trip schedule resulted in refreshed student engagement as well as increased parent involvement.

Parent conferences continued with an in-person format, which improved parent engagement. Restoration of parent council groups further improved parent awareness and involvement.

Staff additions for literacy and math specialists to enhance specific learning was able to be expanded via careful funding allocation as availability of qualified staff improved.

Self-Reflection (Priority 7) – Access to a Broad Course of Study

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served.

School Response

Students at Heartwood are given the opportunity to study a broad range of academic subjects. Independent study students are allowed choices in learning pathways for standard common core subjects, as well as a variety of elective studies. Students are guided through their studies by certificated faculty, who will confirm work samples and verify progress. Students enrolled in our program that offers in-person instruction will receive direct instruction in grade-appropriate curriculum in alignment with California

common core standards. Students with greater needs are identified, assessed and subsequently given access to additional learning opportunities, including additional tutoring, or Individualized Learning Plans as appropriate.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study. LEAs may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study.

School Response

Surveys of faculty and oversight staff indicate that students are enrolled in a broad course of study. All of our independent study students create a Learning Plan together with their certificated teacher, which specifies a broad course of study. Homeschool students may choose from a broad range of curriculum for home instruction as well as additional learning from individual instructional vendors. Students with in-person instruction receive direct instruction of a broad curriculum.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students.

School Response

We believe that we are successful in offering a broad course of study to all students.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students?

School Response

The school will continue to offer broad courses of study to all students and will continue to focus on disadvantaged and special needs students.

- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000.

Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

- Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
 - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)

- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
 - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)
- 7. Total Estimated Actual Expenditures for Contributing Actions
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
 - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
 - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)

- This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
 - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.
- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

Self-Reflection (Priority 6) – School Climate

This is the submission form for the local educational agency (LEA) coordinator (school district, charter school, and county office) to complete on the local performance indicator for school climate (Priority 6).

School Response

The school climate improved somewhat in response to repeated in-person activities, including parent-attended events. Selected student group activities were expanded to include art, music, crafting, cooking, and hiking. School events were expanded with outdoor in-person school plays and events.

A full field trip schedule resulted in refreshed student engagement as well as increased parent involvement.

Parent conferences continued with an in-person format, which improved parent engagement. Restoration of parent council groups further improved parent awareness and involvement.

Staff additions for literacy and math specialists to enhance specific learning was able to be expanded via careful funding allocation as availability of qualified staff improved.

Self-Reflection (Priority 7) – Access to a Broad Course of Study

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served.

School Response

Students at Heartwood are given the opportunity to study a broad range of academic subjects. Independent study students are allowed choices in learning pathways for standard common core subjects, as well as a variety of elective studies. Students are guided through their studies by certificated faculty, who will confirm work samples and verify progress. Students enrolled in our program that offers in-person instruction will receive direct instruction in grade-appropriate curriculum in alignment with California

common core standards. Students with greater needs are identified, assessed and subsequently given access to additional learning opportunities, including additional tutoring, or Individualized Learning Plans as appropriate.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study. LEAs may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study.

School Response

Surveys of faculty and oversight staff indicate that students are enrolled in a broad course of study. All of our independent study students create a Learning Plan together with their certificated teacher, which specifies a broad course of study. Homeschool students may choose from a broad range of curriculum for home instruction as well as additional learning from individual instructional vendors. Students with in-person instruction receive direct instruction of a broad curriculum.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students.

School Response

We believe that we are successful in offering a broad course of study to all students.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students?

School Response

The school will continue to offer broad courses of study to all students and will continue to focus on disadvantaged and special needs students.

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 charter 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 the charter;

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

DATED:

Board Chair

ATTEST:

Board Secretary

Education Protection Account (EPA) Spending Plan*

Estimated Expenditures July 1, 2025 - June 30, 2026

Education Protection Account (Object Code 8012, Resource Code 1400-0)

	Object Codes	Revenue & Expense
Amount Available for this Fiscal Year		
Education Protection Account	8012	142,848
Expenditures		
Certificated Salaries	1000s	
Teacher Salaries	1100	\$142,848
Administrator Salaries	1300	\$0
Classified Salaries	2000s	\$0
Employee Benefits	3000s	\$0
Books and Supplies	4000s	\$0
Services and Other Operating Expenses	5000s	\$0
Capital Outlay	6000s	\$0
Total Expenditures		\$142,848

*Estimated EPA Spending is based on the CDE's estimated 2025-26 EPA Entitlement Actual amount and expenses may be different than stated. Per Proposition 30, EPA funds may not be used for salaries or benefits of administrators or any other administrative costs.

Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Heartwood Charter
CDS Code: 4970797-0139568
Charter School Number: 2071
Allocation Year: 2024-25

As a condition of receipt of funds pursuant to [Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code \(EC\)](#) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.

Submission Date 1/29/2025 5:23:45 PM

Proposition 28: Arts and Music in Schools Funding Annual Report Fiscal Year 2024-25

Name: Heartwood Charter
CDS Code: 4970797-0139568
Charter School Number: 2071
Allocation Year: 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

Heartwood Charter uses the funds to pay certificated for arts based enrichment.

2. Number of full-time equivalent teachers (certificated).	2.0
3. Number of full-time equivalent personnel (classified).	0.0
4. Number of full-time equivalent teaching aides.	0.0
5. Number of students served.	739
6. Number of school sites providing arts education.	1

Date of Approval by Governing Board/Body 6/24/2025 12:00:00 AM

Annual Report Data URL

<https://heartwoodcharterschool.org/our-community/board-agenda/>

Submission Date 5/25/2025 2:34:51 PM

**Art and Music in Schools Prop 28
Spending Plan
6/19/2025**

Dance	Skeydrit Baehr	\$ 96,000.00	76%
Theater	Contract	\$ 15,000.00	12%
Drawing	Haila Hiller	\$ 15,000.00	12%

Total	\$ 126,000.00
Target Funding 25-26	\$ 138,000.00

Future Funding Estimate	\$ 103,000.00
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Executive Director

Salary Study

June 20, 2025

To the Board:

Head of School salaries vary widely between schools depending on geographical area, size of school, the configuration of the school (multiple sites, district or stand alone, specialty focus, charter, etc), as well as the grade level. For the purposes of this survey, data were collected as could be found via public information. Not all schools publish salary data, and not all schools have a schedule for their Heads.

Comparisons were attempted to be as close as possible with the context of the Heartwood Executive Director, with nearby and higher cost of living areas, as well as with similar school sizes and organization types, that is, charters. Points of comparison include:

Novato Charter

Ross Valley Charter

Sebastopol Charter

Monterey Bay Charter

State of California averages

Ross Valley School District (RVSD)

Range of salaries of EdTec clients

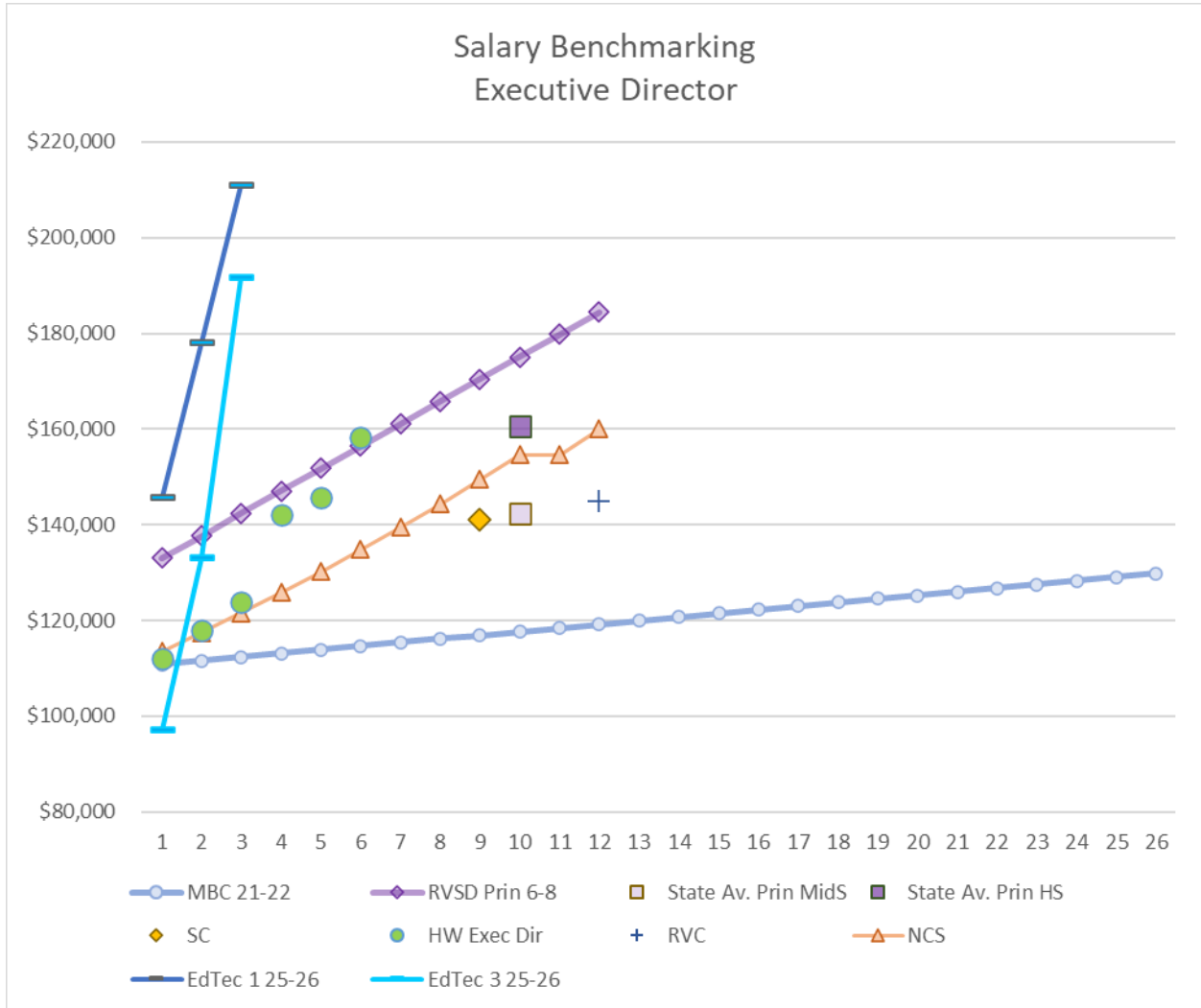
Of these, the first four listed charter schools were selected as possibly the closest suitable comparisons. The school sizes are similar, and well below 1000 enrollment. Three of them are public Waldorf schools, and all are in similar cost of living areas. Ross Valley Charter is also a nearby charter with less than 1000 enrolled students but is a K-5 program without a Waldorf curriculum. However, up to date values may not be available for these schools.

Data from EdTec clients are included this year. These data are from similar sized schools, but are provided by job title, which does not provide context to compare job responsibilities. Other

State average data from 2024-25 is available as a single value, and 10 years' experience in position is assumed as an average tenure.

Ross Valley School District is the district where Heartwood's Bothin Resource Center resides, but the district schools tend to be greater than 1000 enrollment. In addition, the Principals are in charge of much larger staffs and are likely to have much greater experience, since there are two or more intermediate administrative steps between teacher and Principal and candidates are likely to have progressed through those positions before being considered for a head of school job. All of this would act to raise the salaries of the district school Principal positions.

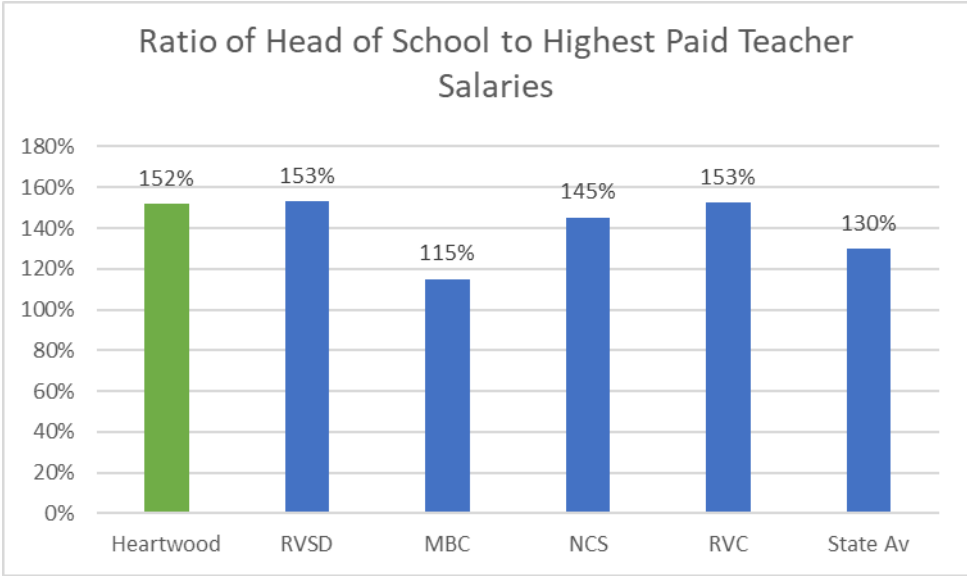
The salary data are shown on the graph below. The salary level in dollars is on the vertical axis, the years of experience or years in position are on the horizontal axis. Where a schedule was available the data were plotted as a line with value plots associated with the years of experience. The Heartwood values are shown as green dots, one for last, this and the upcoming year.



The proposed Heartwood salary is commensurate with RVSD as expected but are above Monterey Bay and Novato for similar experience. The single plots for Sebastopol Charter, Monterey Bay Charter and Sebastopol Charter correspond to single data available. Heartwood values are above State average for Middle Schools, but below the average High Schools (square dots). Heartwood is within ranges provided for EdTec clients.

Position	Years	Heartwood	RVSD	EdTec
Executive Director	6	145,692	176,264	211,150
Dean	1	117,300	117,300	117,300
Director	4	97,173	133,125	191,600

Another measure of compensation is the ratio of the senior administrator to highest paid staff classroom teacher, excluding specialty positions and extra duty assignments. The highest step on a published schedule for classroom teachers AB+60 was used. This should be viewed as a rough metric.



It's recommended to consider an Executive Director salary of \$158,222 for the 2025-26 school year under the current expected budget (June 2025 Adopted Budget).

HEARTWOOD CHARTER SCHOOL & STEPHANIE FELTON-PRIESTNER
Start Date July 01, 2025

THIS EMPLOYMENT AGREEMENT (“Agreement”) is entered into by and between the above named employee (“Employee”) and the Heartwood Charter School (“HCS”) Governing board, a California public charter school approved by the Liberty School District. HCS Governing Board desires to hire employees who will assist HCS in achieving the goals and meeting the requirements of HCS’s charter. The parties recognize that HCS is not governed by the provisions of the California Education Code, except as expressly set forth in the Charter Schools Act of 1992. HCS desires to engage the services of the Employee for purposes of assisting HCS in implementing its purposes, policies, and procedures.

WHEREAS, HCS and Employee wish to enter into an employment relationship under the conditions set forth herein, the parties hereby agree as follows:

A. STATUTORY PROVISIONS RELATING TO CHARTER SCHOOL EMPLOYMENT

1. HCS has been established and operates pursuant to the Charter Schools Act of 1992, Education Code section 47600, *et seq.* HCS has been duly approved by Liberty School District, according to the laws of the State of California.
2. Pursuant to Education Code section 47604, HCS has elected to be formed and to operate as a non-profit public benefit corporation pursuant to the Non-Profit Public Benefit Corporation Law of California (Part 2, commencing with section 5110 *et seq.* of the Corporations Code). As such, HCS is considered a separate legal entity from the Liberty School District, which granted the charter. Liberty School District shall not be liable for any debts and obligations of HCS, and the employee signing below expressly recognizes that he/she is being employed by HCS and not Liberty School District.
3. Pursuant to Education Code section 47610, HCS must comply with all of the provisions set forth in its charter but is otherwise exempt from the laws governing school districts except as specified in Education Code section 47610.
4. HCS shall be deemed the exclusive public school employer of the employees at HCS for purposes of Government Code section 3540.1.

B. EMPLOYMENT TERMS AND CONDITIONS

1. Duties

Employee shall work in the position of Executive Director. Employee will perform such duties as HCS may reasonably assign and Employee will abide by all HCS’s policies and procedures as adopted and amended from time to time. Employee further agrees to abide by HCS’s charter. These duties may be amended from time to time in the sole discretion of HCS.

2. Work Schedule

The work schedule for this position shall be fulltime consisting of varies hours including weekends as needed. Workdays for the Employee shall be consistent with the applicable calendar of workdays for this position.

Employee shall return to work on-site by August 1 of each school year.

Employee will not render services in person or by electronic means, paid or otherwise, for any other person or entity during contracted work hours with HCS.

3. Compensation

The annual salary for this position is **\$158,222**.

4. Employee Benefits

Employee shall be entitled to participate in designated employee benefit programs and plans established by HCS (subject to program and eligibility requirements) for the benefit of its employees, which from time to time may be amended and modified by HCS in its sole discretion.

5. Performance Evaluation

At a minimum, performance evaluation will be conducted annually, on or about the anniversary date of employment with HCS. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems

6. Employee Rights

Employment rights and benefits for employment at HCS shall only be as specified in this Employment Agreement, HCS's charter, the Charter Schools Act and HCS's Employee Handbook, which from time to time may be amended and modified by HCS.

7. Licensure

Employee understands that employment is contingent upon verification and maintenance of any applicable licensure and/or credentials.

8. Child Abuse and Neglect Reporting

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the

scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident. By executing this Agreement, the Employee acknowledges he or she is a child care custodian and is certifying that he or she has knowledge of California Penal Code section 11166 and will comply with its provisions.

9. Fingerprinting/TB Clearance

Fingerprint clearance for Employee will be acquired through submitting the Employee's fingerprints to the California Department of Justice. Employee will be required to assume the cost of all fees related to the fingerprinting process. Employee will be required to submit evidence from a licensed physician and/or licensed entity that he/she was found to be free from active tuberculosis.

10. Conflicts of Interest

Employee understands that, while employed at the School, he or she will have access to confidential and proprietary information. Employee therefore shall not maintain employment or contracts for employment, or engage in any consultant or independent contractor relationship, with any other agency or school that will in any way conflict with his/her employment with HCS.

11. Outside Professional Activities

Upon obtaining prior written approval of the Governing Board, the Employee may undertake for consideration outside professional activities, including consulting, speaking, and writing. The outside activities shall not occur during regular work hours. HCS shall in no way be responsible for any expenses attendant to the performance of such outside activities.

C. GENERAL PROVISIONS

1. Waiver of Breach

The waiver by either party, or the failure of either party to claim a breach of any provision of this Agreement, will not operate or be construed as a waiver of any subsequent breach.

2. Assignment

The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the heirs, legal representatives,

successors and assigns of the parties hereto; provided, however, that this Agreement will not be assignable by either party without prior written consent of the other party.

3. Governing Law

This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of California.

4. Partial Invalidity

If any provision of this Agreement is found to be invalid or unenforceable by any court, the remaining provisions hereof will remain in effect unless such partial invalidity or unenforceability would defeat an essential business purpose of the Agreement.

D. ACCEPTANCE OF EMPLOYMENT

By signing below, the Employee declares as follows:

1. I have read this Agreement and accept employment with HCS on the terms specified herein.
2. All information I have provided to HCS related to my employment is true and accurate.
3. A copy of the job description is attached hereto.
4. This is the entire agreement between HCS Governing Board/ President and me regarding the terms and conditions of my employment. This is a final and complete agreement and there are no other agreements, oral or written, express or implied, concerning the subject matter of this Agreement.

Employee _____ Date: _____
Stephanie Felton Priestner

HCS Board Approval:

Board _____ Date: _____
Mark Puccinelli, HCS Governing Board

Board _____ Date: _____
Greg Browman, HCS Governing Board

Exhibit A Job Description
(to be developed and completed)

Heartwood Charter School

Financial Update

ERIC NOLL

JUNE 24, 2025



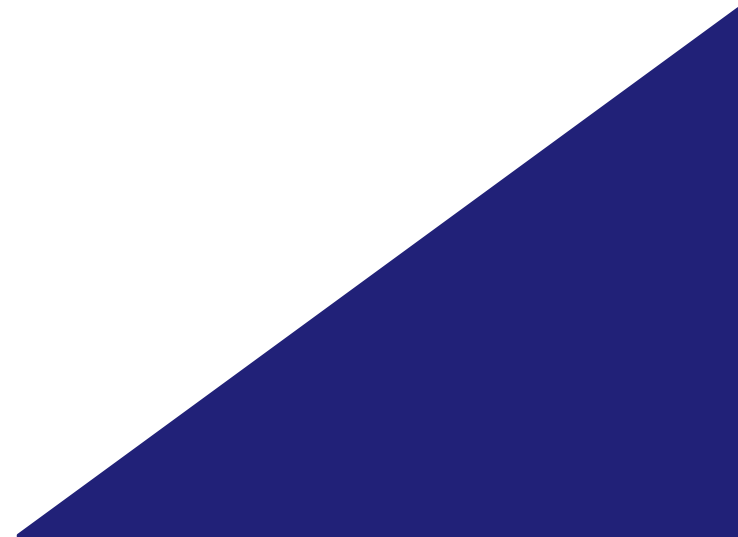
Contents



- **2024-25 Financial Update**
 - Forecast Update

- **2025-26 Budget Development**
 - FY26 State Budget: May Revise
 - MYP
 - Multi-Year Cash Flow
 - Next Steps

- **Exhibits**
 - April Financials
 - April Balance Sheet
 - April Cash Flow
 - MYP



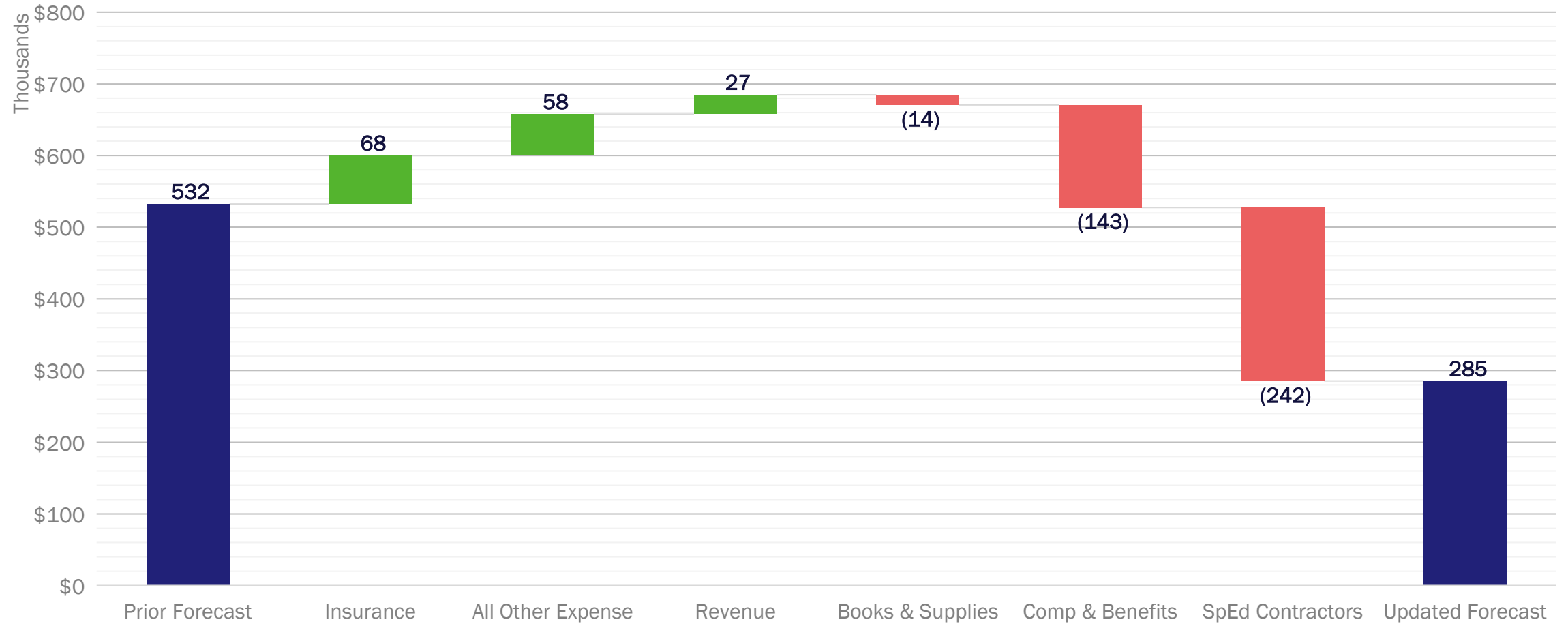
2024-25



2024-25 Forecast Update



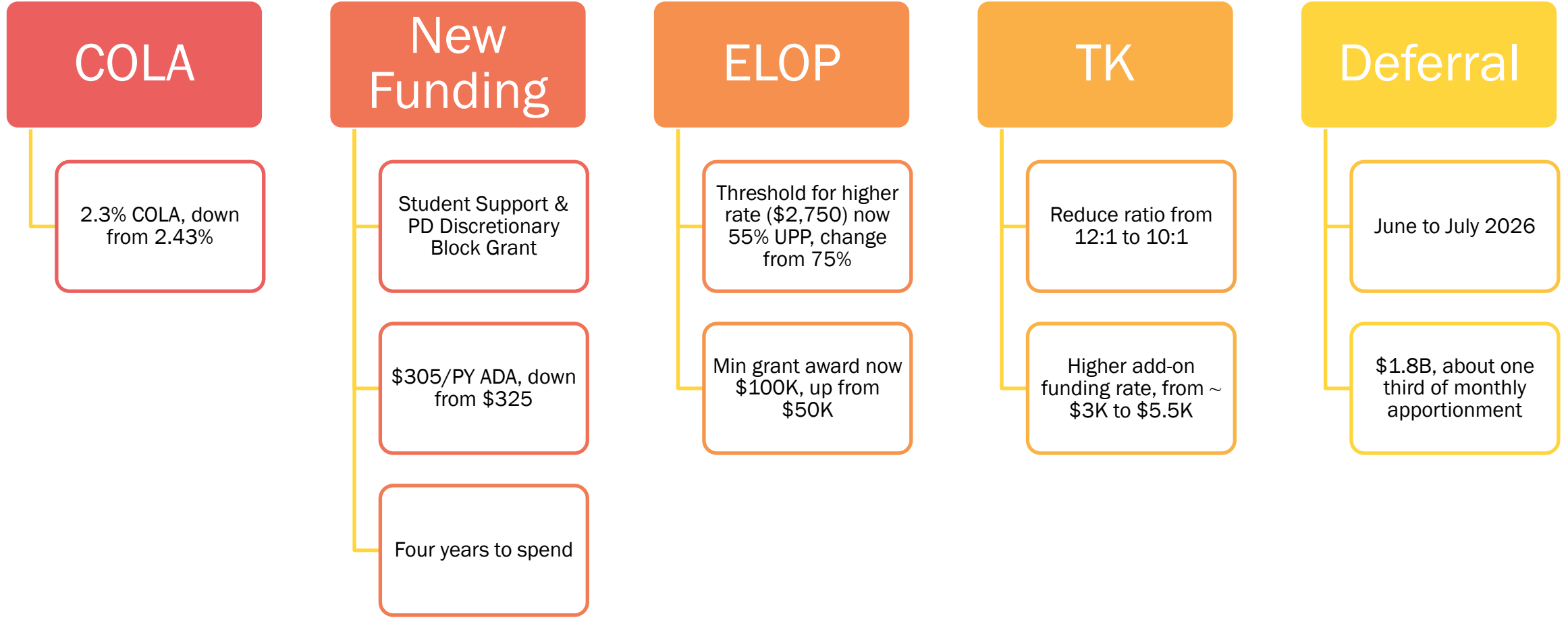
Additional year-end compensation and SpEd Contractors decrease surplus to \$285K



2025-26 & beyond



FY26 State Budget: May Revise

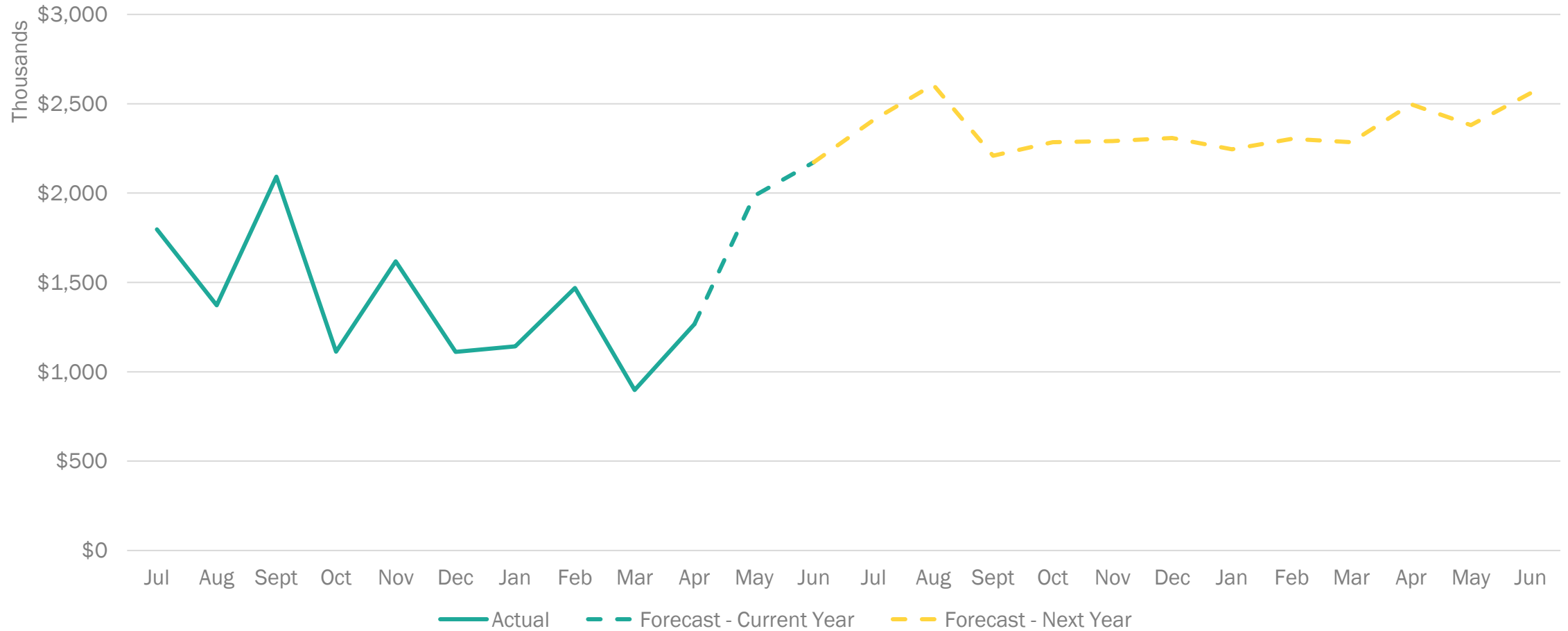


		2024-25	2025-26	2026-27	2027-28
		Current Forecast	Projected Budget	Projected Budget	Projected Budget
Revenue	LCFF Entitlement	8,406,760	8,637,036	9,028,231	9,336,728
	Federal Revenue	97,493	107,155	107,880	109,475
	Other State Revenues	1,290,422	1,329,413	1,121,855	1,124,213
	Local Revenues	34,377	10,000	10,000	10,000
	Fundraising and Grants	63,000	63,000	63,000	63,000
	Total Revenue	9,892,052	10,146,604	10,330,966	10,643,416
Expenses	Comp and Benefits	6,386,322	6,659,272	6,856,213	7,059,007
	Books and Supplies	1,235,369	1,270,332	1,339,008	1,365,789
	Services and Other Ops	1,984,543	1,932,730	1,993,982	2,032,933
	Depreciation	-	-	-	-
	Other Outflows	454	198	-	-
	Total Expenses	9,606,688	9,862,532	10,189,203	10,457,729
	Operating Income	285,364	284,072	141,763	185,687
	Beginning Balance (Audited)	2,746,874	3,032,238	3,316,310	3,458,073
	Operating Income	285,364	284,072	141,763	185,687
Ending Fund Balance (incl. Depreciation)		3,032,238	3,316,310	3,458,073	3,643,760
Ending Fund Balance as % of Expenses		31.56%	33.63%	33.94%	34.84%

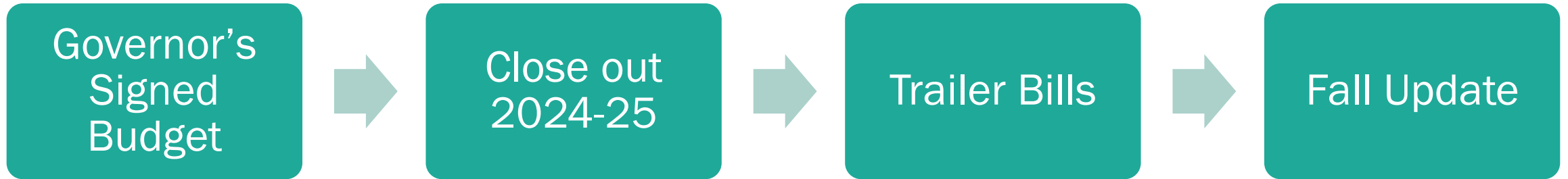
Multi-Year Monthly Cash Balance



Cash stays healthy through June 2026 – 1 month payroll ~\$550K



Next Steps



Exhibits



Heartwood Charter School
Income Statement
As of Apr FY2025

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
SUMMARY											
Revenue											
LCFF Entitlement	918,924	-	-	3,584,386	7,673,527	8,417,892	8,406,760	(11,133)	733,233	4,822,374	43%
Federal Revenue	-	-	-	-	78,000	83,860	97,493	13,633	19,493	97,493	0%
Other State Revenues	131,511	-	289,879	624,581	1,111,895	1,275,346	1,290,422	15,076	178,528	665,842	48%
Local Revenues	6,618	251,859	1,376,276	1,651,867	10,000	25,000	34,377	9,377	24,377	(1,617,490)	4805%
Fundraising and Grants	-	-	-	63,000	60,000	63,000	63,000	-	3,000	-	100%
Total Revenue	1,057,053	251,859	1,666,155	5,923,833	8,933,422	9,865,098	9,892,052	26,954	958,630	3,968,219	60%
Expenses											
Compensation and Benefits	609,035	594,489	615,070	5,184,584	5,821,998	6,243,400	6,386,322	(142,922)	(564,324)	1,201,738	81%
Books and Supplies	66,674	78,208	158,006	914,390	1,155,709	1,221,209	1,235,369	(14,160)	(79,660)	320,979	74%
Services and Other Operating Expenditures	165,442	172,864	238,906	1,474,666	1,676,253	1,866,446	1,984,543	(118,097)	(308,289)	509,877	74%
Depreciation	-	-	-	-	-	-	-	-	-	-	-
Other Outflows & Amortization	1,942	106	1,463	141,047	1,622	1,622	454	1,168	1,168	(140,593)	31068%
Total Expenses	843,093	845,667	1,013,444	7,714,686	8,655,583	9,332,677	9,606,688	(274,011)	(951,105)	1,892,002	80%
Net Income	213,960	(593,808)	652,711	(1,790,853)	277,839	532,421	285,364	(247,057)	7,525	2,076,217	
Fund Balance											
Beginning Balance (Unaudited)					2,664,274	2,713,105	2,713,105				
Audit Adjustment					-	-	33,769				
Net Income					277,839	532,421	285,364				
Ending Fund Balance					2,942,113	3,245,526	3,032,238				
Fund Balance as a % of Expenses						34%	35%				32%

Heartwood Charter School
Income Statement
As of Apr FY2025

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
KEY ASSUMPTIONS											
Enrollment Summary											
K-3					410	396	396	-	(14)		
4-6					182	224	224	-	42		
7-8					84	100	100	-	16		
9-12					24	17	17	-	(7)		
Total Enrolled					700	737	737	-	37		
ADA %											
K-3					94.0%	97.5%	97.0%	-0.5%	3.0%		
4-6					94.0%	97.5%	99.2%	1.7%	5.2%		
7-8					94.0%	97.5%	96.0%	-1.6%	2.0%		
9-12					94.0%	97.5%	99.9%	2.4%	5.9%		
Average ADA %					94.0%	97.5%	97.6%	0.1%	3.6%		
ADA											
K-3					385.40	386.10	384.10	(2.00)	(1.30)		
4-6					171.08	218.40	222.28	3.88	51.20		
7-8					78.96	97.50	95.95	(1.55)	16.99		
9-12					22.56	16.58	16.98	0.40	(5.58)		
Total ADA					658.00	718.58	719.31	0.73	61.31		

Heartwood Charter School
Income Statement
As of Apr FY2025

		Actual			YTD	Budget & Forecast						
		Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
REVENUE												
LCFF Entitlement												
8011	Charter Schools General Purpose Entitlement - State Aid	646,834	-	-	1,976,437	4,270,351	4,875,123	4,835,208	(39,915)	564,857	2,858,771	41%
8012	Education Protection Account Entitlement	29,134	-	-	58,269	131,600	143,716	143,862	146	12,262	85,593	41%
8019	State Aid - Prior Years	(5,944)	-	-	(5,944)	-	-	(5,944)	(5,944)	(5,944)	-	100%
8096	Charter Schools in Lieu of Property Taxes	248,900	-	-	1,555,624	3,271,576	3,399,053	3,433,633	34,581	162,057	1,878,009	45%
SUBTOTAL - LCFF Entitlement		918,924	-	-	3,584,386	7,673,527	8,417,892	8,406,760	(11,133)	733,233	4,822,374	43%
Federal Revenue												
8181	Special Education - Entitlement	-	-	-	-	78,000	83,860	97,493	13,633	19,493	97,493	0%
SUBTOTAL - Federal Revenue		-	-	-	-	78,000	83,860	97,493	13,633	19,493	97,493	0%
Other State Revenue												
8319	Other State Apportionments - Prior Years	1,150	-	16,424	17,573	-	-	17,573	17,573	17,573	-	100%
8381	Special Education - Entitlement (State)	70,146	-	-	214,335	583,426	644,494	645,149	655	61,723	430,814	33%
8382	Special Education Reimbursement (State)	8,712	-	-	26,620	52,449	57,278	59,334	2,056	6,885	32,714	45%
8550	Mandated Cost Reimbursements	-	-	-	12,487	12,393	12,487	12,486	(0)	93	(1)	100%
8560	State Lottery Revenue	37,588	-	-	37,588	171,126	204,894	205,102	208	33,976	167,514	18%
8590	All Other State Revenue	-	-	237,381	237,381	173,578	237,381	237,381	-	63,803	-	100%
8591	Prop 28 Arts & Music in Schools	13,916	-	36,075	78,597	118,922	118,811	113,397	(5,415)	(5,525)	34,800	69%
SUBTOTAL - Other State Revenue		131,511	-	289,879	624,581	1,111,895	1,275,346	1,290,422	15,076	178,528	665,842	48%
Local Revenue												
8660	Interest	3,623	-	-	12,211	10,000	15,000	15,000	-	5,000	2,789	81%
8699	All Other Local Revenue	-	-	19,377	19,377	-	10,000	19,377	9,377	19,377	-	100%
8999	Uncategorized Revenue	2,995	251,859	1,356,899	1,620,279	-	-	-	-	-	(1,620,279)	
SUBTOTAL - Local Revenue		6,618	251,859	1,376,276	1,651,867	10,000	25,000	34,377	9,377	24,377	(1,617,490)	4805%
Fundraising and Grants												
8803	Fundraising	-	-	-	63,000	60,000	63,000	63,000	-	3,000	-	100%
SUBTOTAL - Fundraising and Grants		-	-	-	63,000	60,000	63,000	63,000	-	3,000	-	100%
TOTAL REVENUE												
		1,057,053	251,859	1,666,155	5,923,833	8,933,422	9,865,098	9,892,052	26,954	958,630	3,968,219	60%

Heartwood Charter School
Income Statement
As of Apr FY2025

	Actual			YTD	Budget & Forecast							
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs.	Approved Budget v1 vs.	Current Forecast	% Current Forecast	
								Current Forecast	Current Forecast	Remaining	Spent	
EXPENSES												
Compensation & Benefits												
Certificated Salaries												
1100	Teachers Salaries	309,816	305,566	303,476	2,617,943	2,732,438	3,086,496	3,099,757	(13,260)	(367,319)	481,814	84%
1103	Teacher - Substitute Pay	-	-	-	-	16,426	16,426	16,426	-	-	16,426	0%
1148	Teacher - Special Ed	65,775	77,335	67,372	612,253	772,691	738,931	802,517	(63,586)	(29,826)	190,265	76%
1300	Certificated Supervisor & Administrator Salaries	21,472	21,472	21,472	215,222	378,644	314,542	260,467	54,075	118,177	45,245	83%
	SUBTOTAL - Certificated Salaries	397,063	404,373	392,320	3,445,418	3,900,199	4,156,395	4,179,167	(22,772)	(278,968)	733,749	82%
Classified Salaries												
2100	Classified Instructional Aide Salaries	44,793	31,128	43,820	355,553	293,411	405,647	427,397	(21,750)	(133,986)	71,844	83%
2300	Classified Supervisor & Administrator Salaries	14,906	14,714	15,406	148,609	178,725	183,976	249,051	(65,075)	(70,326)	100,442	60%
2400	Classified Clerical & Office Salaries	26,609	23,695	25,272	243,021	247,684	265,108	281,608	(16,500)	(33,923)	38,587	86%
2905	Other Classified - After School	-	-	-	-	63,000	-	-	-	63,000	-	-
2999	Payroll Temporary Holding Account	-	-	10,159	10,159	-	-	-	-	-	(10,159)	-
	SUBTOTAL - Classified Salaries	86,308	69,536	94,656	757,341	782,820	854,731	958,055	(103,325)	(175,235)	200,715	79%
Employee Benefits												
3100	STRS	50	50	50	150	-	-	-	-	-	(150)	-
3300	OASDI-Medicare-Alternative	36,151	35,421	36,361	314,958	353,303	383,351	392,998	(9,646)	(39,694)	78,040	80%
3400	Health & Welfare Benefits	29,144	24,955	30,776	200,904	240,332	262,268	259,406	2,861	(19,074)	58,503	77%
3500	Unemployment Insurance	16,793	16,454	16,890	135,240	141,299	148,724	147,542	1,182	(6,243)	12,302	92%
3600	Workers Comp Insurance	5,348	5,348	5,348	26,740	65,562	70,156	71,921	(1,765)	(6,359)	45,181	37%
3900	Other Employee Benefits	38,178	38,352	38,668	303,834	338,482	367,775	377,232	(9,457)	(38,750)	73,399	81%
	SUBTOTAL - Employee Benefits	125,665	120,580	128,093	981,825	1,138,979	1,232,274	1,249,100	(16,826)	(110,120)	267,275	79%
Books & Supplies												
4200	Books & Other Reference Materials	-	-	-	-	7,344	7,344	7,344	-	-	7,344	0%
4325	Instructional Materials & Supplies	1,730	1,731	16,215	81,242	27,810	27,810	85,000	(57,190)	(57,190)	3,758	96%
4330	Office Supplies	-	49	-	2,334	12,875	12,875	12,875	-	-	10,541	18%
4352	Homeschool Instructional Funds	62,081	71,305	136,551	808,043	1,050,000	1,105,500	1,058,650	46,850	(8,650)	250,607	76%
4410	Classroom Furniture, Equipment & Supplies	-	848	-	2,497	5,150	5,150	5,150	-	-	2,653	48%
4420	Computers: individual items less than \$5k	1,626	3,503	-	8,904	6,180	6,180	10,000	(3,820)	(3,820)	1,096	89%
4700	Food	-	-	-	-	46,350	46,350	46,350	-	-	46,350	0%
4710	Student Food Services	1,238	259	5,240	10,856	-	10,000	10,000	-	(10,000)	(856)	109%
4720	Other Food	-	513	-	513	-	-	-	-	-	(513)	-
	SUBTOTAL - Books and Supplies	66,674	78,208	158,006	914,390	1,155,709	1,221,209	1,235,369	(14,160)	(79,660)	320,979	74%
Services & Other Operating Expenses												
5200	Travel & Conferences	-	-	-	-	10,300	10,300	10,300	-	-	10,300	0%
5300	Dues & Memberships	-	-	-	1,940	5,516	5,516	5,516	-	-	3,576	35%
5400	Insurance	-	6,397	-	35,846	127,230	133,955	66,330	67,625	60,900	30,484	54%
5510	Utilities - Gas and Electric	699	587	-	1,286	3,461	3,461	3,461	-	-	2,174	37%
5515	Janitorial, Gardening Services & Supplies	5,370	2,785	9,575	38,366	30,900	30,900	30,900	-	-	(7,466)	124%
5530	Utilities - Water	264	262	245	1,820	1,545	1,545	2,000	(455)	(455)	180	91%
5600	Rentals, Leases, & Repairs	831	-	831	3,324	-	3,289	3,289	-	(3,289)	(35)	101%
5610	Rent	-	24,831	17,500	175,824	175,100	225,100	225,100	-	(50,000)	49,276	78%
5617	Repairs and Maintenance - Other Equipment	-	318	-	12,418	4,120	15,000	15,000	-	(10,880)	2,582	83%

Heartwood Charter School
Income Statement
As of Apr FY2025

	Actual			YTD	Budget & Forecast							
	Feb	Mar	Apr	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current	
					Budget v1	Forecast	Forecast	Forecast vs. Current	Budget v1 vs. Current	Forecast Remaining	Forecast Spent	
5803 Accounting Fees	-	-	1,500	6,900	22,117	22,117	22,117	-	-	-	15,217	31%
5809 Banking Fees	40	13	43	183	614	614	614	-	-	-	431	30%
5812 Business Services	17,500	17,500	17,500	175,000	200,000	200,000	200,000	-	-	-	25,000	88%
5820 Consultants - Non Instructional	-	88	(8)	80	-	-	-	-	-	-	(80)	
5824 District Oversight Fees	9,249	-	-	37,460	79,037	86,704	86,590	115	(7,552)	-	49,130	43%
5829 Enrichment Program	2,140	-	-	2,140	50,000	50,000	25,000	25,000	25,000	-	22,860	9%
5830 Field Trips Expenses	-	3,831	1,956	13,148	27,810	27,810	27,810	-	-	-	14,662	47%
5833 Fines and Penalties	-	-	-	-	54	54	54	-	-	-	54	0%
5836 Fingerprinting	94	-	-	4,911	515	5,000	5,000	-	(4,485)	-	89	98%
5845 Legal Fees	14,476	3,937	5,657	69,106	64,890	64,890	64,890	-	-	-	(4,216)	106%
5848 Licenses and Other Fees	-	-	-	-	43	43	43	-	-	-	43	0%
5851 Marketing and Student Recruiting	289	-	-	1,789	4,120	4,120	4,120	-	-	-	2,331	43%
5857 Payroll Fees	835	515	514	5,024	4,326	4,326	6,000	(1,674)	(1,674)	-	976	84%
5860 Printing and Reproduction	-	-	-	74	865	865	865	-	-	-	791	9%
5861 Prior Yr Exp (not accrued)	135	-	-	11,554	-	11,419	11,554	(135)	(11,554)	-	-	100%
5863 Professional Development	2,394	1,688	6,622	30,739	71,235	75,744	42,027	33,716	29,207	-	11,289	73%
5869 Special Education Contract Instructors	108,704	107,108	173,962	780,368	663,320	752,661	994,950	(242,289)	(331,630)	-	214,582	78%
5872 Special Education Encroachment	-	-	-	-	29,128	29,128	29,128	-	-	-	29,128	0%
5875 Staff Recruiting	723	1,059	-	1,783	3,090	3,090	3,090	-	-	-	1,307	58%
5878 Student Assessment	-	-	-	-	8,652	8,652	8,652	-	-	-	8,652	0%
5881 Student Information System	-	428	-	45,972	51,912	51,912	51,912	-	-	-	5,940	89%
5887 Technology Services	-	1,065	1,200	8,479	25,750	25,750	25,750	-	-	-	17,271	33%
5899 Miscellaneous Operating Expenses	-	-	-	-	4,326	4,326	4,326	-	-	-	4,326	0%
5910 Communications - Internet / Website Fees	1,185	-	1,205	4,665	1,622	3,500	3,500	-	(1,878)	-	(1,165)	133%
5915 Postage and Delivery	302	235	387	2,753	2,060	2,060	2,060	-	-	-	(693)	134%
5920 Communications - Telephone & Fax	212	216	216	1,715	2,596	2,596	2,596	-	-	-	881	66%
SUBTOTAL - Services & Other Operating Exp.	165,442	172,864	238,906	1,474,666	1,676,253	1,866,446	1,984,543	(118,097)	(308,289)	509,877	74%	
Capital Outlay & Depreciation												
SUBTOTAL - Capital Outlay & Depreciation	-	-	-	-	-	-	-	-	-	-	-	
Other Outflows & Amortization												
7438 Long term debt - Interest	56	-	-	454	1,622	1,622	454	1,168	1,168	-	-	100%
7999 Uncategorized Expense	1,886	106	1,463	140,593	-	-	-	-	-	-	(140,593)	
SUBTOTAL - Other Outflows & Amortization	1,942	106	1,463	141,047	1,622	1,622	454	1,168	1,168	(140,593)	31068%	
TOTAL EXPENSES	843,093	845,667	1,013,444	7,714,686	8,655,583	9,332,677	9,606,688	(274,011)	(951,105)	1,892,002	80%	

Heartwood Charter School
Monthly Cash Forecast
As of Apr FY2025

	2024-25													Forecast	Remaining Balance
	Actuals & Forecast														
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Actuals	Feb Actuals	Mar Actuals	Apr Actuals	May Forecast	Jun Forecast			
Beginning Cash	2,598,616	1,796,758	1,371,695	2,091,977	1,112,987	1,617,964	1,111,415	1,143,064	1,468,858	898,136	1,266,326	1,984,896			
REVENUE															
LCFF Entitlement	-	-	546,027	-	1,049,318	248,900	821,217	918,924	-	-	2,782,989	824,280	8,406,760	1,215,105	
Federal Revenue	-	-	-	-	-	-	-	-	-	-	48,747	-	97,493	48,747	
Other State Revenue	-	-	51,542	-	92,774	-	58,874	131,511	-	289,879	138,968	325,391	1,290,422	201,483	
Other Local Revenue	-	-	1,532	425	5,639	1,541	7,977	6,618	251,859	1,376,276	(1,620,928)	3,438	34,377	-	
Fundraising & Grants	-	-	-	-	63,000	-	-	-	-	-	(63,000)	-	63,000	63,000	
TOTAL REVENUE	-	-	599,101	425	1,210,731	250,441	888,068	1,057,053	251,859	1,666,155	1,286,776	1,153,108	9,892,052	1,528,335	
EXPENSES															
Certificated Salaries	28,117	253,355	385,914	381,279	420,713	382,849	399,434	397,063	404,373	392,320	314,628	419,121	4,179,167	-	
Classified Salaries	35,501	38,918	94,140	92,228	97,504	72,787	75,763	86,308	69,536	94,656	39,175	161,540	958,055	-	
Employee Benefits	36,140	72,238	123,189	112,107	71,469	67,467	124,877	125,665	120,580	128,093	170,999	96,276	1,249,100	-	
Books & Supplies	11,565	20,104	110,172	160,325	129,251	71,928	108,157	66,674	78,208	158,006	144,495	130,134	1,235,369	46,350	
Services & Other Operating Expenses	32,554	27,388	98,077	212,444	204,616	137,205	185,172	165,442	172,864	238,906	131,599	145,077	1,984,543	233,200	
Capital Outlay & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other Outflows	2,604	326	13,861	386	62,122	53,642	4,594	1,942	106	1,463	(140,593)	-	454	-	
TOTAL EXPENSES	146,481	412,329	825,355	958,768	985,674	785,878	897,997	843,093	845,667	1,013,444	660,304	952,148	9,606,688	279,550	
Operating Cash Inflow (Outflow)	(146,481)	(412,329)	(226,253)	(958,343)	225,057	(535,437)	(9,929)	213,960	(593,808)	652,711	626,472	200,961	285,364	1,248,784	
Accounts Receivable	(549,504)	-	1,100,547	-	363,716	37,737	-	(100,133)	-	(10,781)	335,932	132,829	-	-	
Other Current Assets	552	-	-	-	-	-	-	-	-	-	-	-	-	-	
Accounts Payable	15,545	16,121	(46,952)	(50,453)	(61,013)	2,191	(11,801)	220,337	749	(2,725)	(206,614)	-	-	-	
Other Current Liabilities	(2,311)	15,778	(132,117)	9,158	(30,204)	(33,526)	38,657	(15,351)	(352)	(20,233)	(37,220)	-	-	-	
Summer Holdback	(105,229)	(44,635)	18,565	20,649	23,295	22,486	22,659	22,856	22,689	22,673	-	-	-	-	
Deferred Revenue	(14,429)	-	14,429	-	-	-	-	-	-	(273,456)	-	(145,702)	-	-	
Loans Payable (Long-Term)	-	-	(7,937)	-	(15,874)	-	(7,937)	(15,874)	-	-	-	-	-	-	
Ending Cash	1,796,758	1,371,695	2,091,977	1,112,987	1,617,964	1,111,415	1,143,064	1,468,858	898,136	1,266,326	1,984,896	2,172,984			

Heartwood Charter School

Balance Sheet

As of Apr FY2025

	Jun FY24	Apr FY25	Projected Jun FY25
ASSETS			
Cash Balance	2,598,616	1,266,326	2,172,984
Accounts Receivable	1,310,345	468,761	1,528,335
Other Current Assets	552	-	-
TOTAL ASSETS	3,909,512	1,735,088	3,701,319
LIABILITIES & EQUITY			
Accounts Payable	124,615	206,616	279,552
Other Current Liabilities	207,722	37,220	-
Summer Holdback	162,274	188,282	188,282
Deferred Revenue	564,859	291,404	145,702
Loans Payable (Long-Term)	103,167	55,545	55,545
Beginning Net Assets	2,535,036	2,746,874	2,746,874
Net Income (Loss) to Date	211,840	(1,790,853)	285,364
TOTAL LIABILITIES & EQUITY	3,909,512	1,735,088	3,701,319

Heartwood Charter School
Multi-year Projection
As of Apr FY2025

	Year 1	Year 2	Year 3	Year 4
	2024-25	2025-26	2026-27	2027-28
SUMMARY				
Revenue				
LCFF Entitlement	8,406,760	8,637,036	9,028,231	9,336,728
Federal Revenue	97,493	107,155	107,880	109,475
Other State Revenues	1,290,422	1,329,413	1,121,855	1,124,213
Local Revenues	34,377	10,000	10,000	10,000
Fundraising and Grants	63,000	63,000	63,000	63,000
Total Revenue	9,892,052	10,146,604	10,330,965	10,643,416
Expenses				
Compensation and Benefits	6,386,322	6,659,272	6,856,213	7,059,007
Books and Supplies	1,235,369	1,270,332	1,339,008	1,365,789
Services and Other Operating Expenditures	1,984,543	1,932,730	1,993,982	2,032,933
Depreciation	-	-	-	-
Other Outflows & Amortization	454	198	-	-
Total Expenses	9,606,688	9,862,533	10,189,203	10,457,729
Net Income	285,364	284,071	141,762	185,687
Fund Balance				
Beginning Balance (Unaudited)	2,713,105	3,032,238	3,316,310	3,458,072
Audit Adjustment	33,769			
Beginning Balance (Audited)	2,746,874	3,032,238	3,316,310	3,458,072
Net Income	285,364	284,071	141,762	185,687
Ending Fund Balance	3,032,238	3,316,310	3,458,072	3,643,759
Total Revenue Per ADA	13,752	14,206	14,254	14,685
Total Expenses Per ADA	13,355	13,808	14,058	14,428
Net Income Per ADA	397	398	196	256
Fund Balance as a % of Expenses	32%	34%	34%	35%

Heartwood Charter School
Multi-year Projection
As of Apr FY2025

	Year 1	Year 2	Year 3	Year 4
	2024-25	2025-26	2026-27	2027-28
Key Assumptions				
Enrollment Breakdown				
TK	58	42	40	40
K	82	68	70	70
1	87	83	83	83
2	95	86	82	82
3	74	91	81	81
4	90	76	84	84
5	67	82	86	86
6	67	70	72	72
7	49	65	64	64
8	51	47	59	59
9	5	23	23	23
10	3	4	4	4
11	4	3	3	3
12	5	4	4	4
Total Enrolled	737	744	755	755
ADA %				
K-3	97.0%	96.0%	96.0%	96.0%
4-6	99.2%	96.0%	96.0%	96.0%
7-8	96.0%	96.0%	96.0%	96.0%
9-12	99.9%	96.0%	96.0%	96.0%
Average ADA %	97.6%	96.0%	96.0%	96.0%
ADA				
K-3	384	355	342	342
4-6	222	219	232	232
7-8	96	108	118	118
9-12	17	33	33	33
Total ADA	719	714	725	725

Heartwood Charter School
Multi-year Projection
As of Apr FY2025

		Year 1	Year 2	Year 3	Year 4
		2024-25	2025-26	2026-27	2027-28
REVENUE					
LCFF Entitlement					
8011	Charter Schools General Purpose Entitlement - State Aid	4,835,208	5,100,807	5,416,709	5,731,928
8012	Education Protection Account Entitlement	143,862	142,848	144,960	144,960
8019	State Aid - Prior Years	(5,944)	-	-	-
8096	Charter Schools in Lieu of Property Taxes	3,433,633	3,393,382	3,466,561	3,459,840
SUBTOTAL - LCFF Entitlement		8,406,760	8,637,036	9,028,231	9,336,728
Federal Revenue					
8181	Special Education - Entitlement	97,493	107,155	107,880	109,475
SUBTOTAL - Federal Revenue		97,493	107,155	107,880	109,475
Other State Revenue					
8319	Other State Apportionments - Prior Years	17,573	-	-	-
8381	Special Education - Entitlement (State)	645,149	659,989	665,026	665,026
8382	Special Education Reimbursement (State)	59,334	56,932	57,774	57,774
8550	Mandated Cost Reimbursements	12,486	15,381	16,428	17,257
8560	State Lottery Revenue	205,102	203,657	206,668	206,668
8590	All Other State Revenue	237,381	255,329	73,200	73,200
8591	Prop 28 Arts & Music in Schools	113,397	138,125	102,759	104,288
SUBTOTAL - Other State Revenue		1,290,422	1,329,413	1,121,855	1,124,213
Local Revenue					
8660	Interest	15,000	10,000	10,000	10,000
8699	All Other Local Revenue	19,377	-	-	-
SUBTOTAL - Local Revenue		34,377	10,000	10,000	10,000
Fundraising and Grants					
8803	Fundraising	63,000	63,000	63,000	63,000
SUBTOTAL - Fundraising and Grants		63,000	63,000	63,000	63,000
TOTAL REVENUE		9,892,052	10,146,604	10,330,965	10,643,416

Heartwood Charter School
Multi-year Projection
As of Apr FY2025

		Year 1	Year 2	Year 3	Year 4
		2024-25	2025-26	2026-27	2027-28
EXPENSES					
Compensation & Benefits					
Certificated Salaries					
1100	Teachers Salaries	3,099,757	3,078,588	3,170,945	3,266,074
1103	Teacher - Substitute Pay	16,426	16,919	17,426	17,949
1148	Teacher - Special Ed	802,517	908,567	935,824	963,899
1300	Certificated Supervisor & Administrator Salaries	260,467	273,595	281,803	290,257
SUBTOTAL - Certificated Salaries		4,179,167	4,277,669	4,405,999	4,538,179
Classified Salaries					
2100	Classified Instructional Aide Salaries	427,397	478,869	493,235	508,032
2300	Classified Supervisor & Administrator Salaries	249,051	319,604	329,193	339,068
2400	Classified Clerical & Office Salaries	281,608	273,061	281,253	289,690
SUBTOTAL - Classified Salaries		958,055	1,071,534	1,103,680	1,136,790
Employee Benefits					
3300	OASDI-Medicare-Alternative	392,998	409,214	421,490	434,135
3400	Health & Welfare Benefits	259,406	274,322	279,809	285,405
3500	Unemployment Insurance	147,542	158,755	163,424	168,233
3600	Workers Comp Insurance	71,921	74,889	77,136	79,450
3900	Other Employee Benefits	377,232	392,889	404,676	416,816
SUBTOTAL - Employee Benefits		1,249,100	1,310,070	1,346,534	1,384,038
Books & Supplies					
4200	Books & Other Reference Materials	7,344	7,491	7,641	7,793
4325	Instructional Materials & Supplies	85,000	86,700	88,434	90,203
4330	Office Supplies	12,875	13,133	13,395	13,663
4352	Homeschool Instructional Funds	1,058,650	1,090,079	1,155,150	1,178,253
4410	Classroom Furniture, Equipment & Supplies	5,150	5,253	5,358	5,465
4420	Computers: individual items less than \$5k	10,000	10,200	10,404	10,612
4700	Food	46,350	47,277	48,223	49,187
4710	Student Food Services	10,000	10,200	10,404	10,612
SUBTOTAL - Books and Supplies		1,235,369	1,270,332	1,339,008	1,365,789
Services & Other Operating Expenses					
5200	Travel & Conferences	10,300	10,506	10,716	10,930
5300	Dues & Memberships	5,516	5,626	5,738	5,853
5400	Insurance	66,330	68,299	70,695	72,109
5510	Utilities - Gas and Electric	3,461	3,530	3,601	3,673
5515	Janitorial, Gardening Services & Supplies	30,900	31,518	32,148	32,791
5530	Utilities - Water	2,000	2,040	2,081	2,122
5600	Rentals, Leases, & Repairs	3,289	-	-	-
5610	Rent	225,100	229,602	234,194	238,878
5617	Repairs and Maintenance - Other Equipment	15,000	15,300	15,606	15,918
5803	Accounting Fees	22,117	22,559	23,010	23,470
5809	Banking Fees	614	626	639	651
5812	Business Services	200,000	207,500	215,000	215,000
5824	District Oversight Fees	86,590	90,741	96,748	102,055
5829	Enrichment Program	25,000	25,500	26,010	26,530
5830	Field Trips Expenses	27,810	28,366	28,934	29,512
5833	Fines and Penalties	54	55	56	57

Heartwood Charter School
Multi-year Projection
As of Apr FY2025

	Year 1	Year 2	Year 3	Year 4
	2024-25	2025-26	2026-27	2027-28
5836 Fingerprinting	5,000	5,100	5,202	5,306
5845 Legal Fees	64,890	66,188	67,512	68,862
5848 Licenses and Other Fees	43	44	45	46
5851 Marketing and Student Recruiting	4,120	4,202	4,286	4,372
5857 Payroll Fees	6,000	6,120	6,242	6,367
5860 Printing and Reproduction	865	883	900	918
5861 Prior Yr Exp (not accrued)	11,554	-	-	-
5863 Professional Development	42,027	44,791	45,687	46,600
5869 Special Education Contract Instructors	994,950	930,000	962,625	981,878
5872 Special Education Encroachment	29,128	29,711	30,305	30,911
5875 Staff Recruiting	3,090	3,152	3,215	3,279
5878 Student Assessment	8,652	8,825	9,002	9,182
5881 Student Information System	51,912	52,950	54,009	55,089
5887 Technology Services	25,750	26,265	26,790	27,326
5899 Miscellaneous Operating Expenses	4,326	4,413	4,501	4,591
5910 Communications - Internet / Website Fees	3,500	3,570	3,641	3,714
5915 Postage and Delivery	2,060	2,101	2,143	2,186
5920 Communications - Telephone & Fax	2,596	2,648	2,700	2,754
SUBTOTAL - Services & Other Operating Exp.	1,984,543	1,932,730	1,993,982	2,032,933
Depreciation Expense				
SUBTOTAL - Depreciation Expense	-	-	-	-
Other Outflows & Amortization				
7438 Long term debt - Interest	454	198	-	-
SUBTOTAL - Other Outflows & Amortization	454	198	-	-
TOTAL EXPENSES	9,606,688	9,862,533	10,189,203	10,457,729

**CHARTER SCHOOL
BUDGET REPORT - ALTERNATIVE FORM**

Charter School Name: Heartwood Charter
 (name continued) _____
 CDS #: 49-70797-0139568 _____
 Charter Approving Entity: Liberty Elementary _____
 County: Sonoma _____
 Charter #: 2071 _____
 Budgeting Period: 2025-26 _____

This charter school uses the following basis of accounting:

- 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	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
A. REVENUES					
1. LCFF Sources					
State Aid - Current Year	8011	4,835,208.27	5,100,806.66		5,100,806.66
Education Protection Account State Aid - Current Year	8012	143,862.00	142,848.00		142,848.00
State Aid - Prior Years	8019	(5,944.00)	-		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	3,433,633.48	3,393,381.74		3,393,381.74
Other Revenue Limit Transfers	8091, 8097				0.00
Total, LCFF/Revenue Limit Sources		8,406,759.75	8,637,036.40	0.00	8,637,036.40
2. Federal Revenues					
No Child Left Behind/Every Student Succeeds Act	8290	0.00		-	0.00
Special Education - Federal	8181, 8182	97,493.24		107,155.00	107,155.00
Child Nutrition - Federal	8220	0.00		-	0.00
Donated Food Commodities	8221				0.00
Other Federal Revenues	8110, 8260-8299	0.00		-	0.00
Total, Federal Revenues		97,493.24	0.00	107,155.00	107,155.00
3. Other State Revenues					
Special Education - State	StateRevSE	704,483.14		716,920.91	716,920.91
All Other State Revenues	StateRevAO	585,939.18	219,038.03	393,453.65	612,491.68
Total, Other State Revenues		1,290,422.32	219,038.03	1,110,374.57	1,329,412.60
4. Other Local Revenues					
All Other Local Revenues	LocalRevAO	97,376.80	73,000.00	-	73,000.00
Total, Local Revenues		97,376.80	73,000.00	0.00	73,000.00
5. TOTAL REVENUES					
		9,892,052.11	8,929,074.43	1,217,529.57	10,146,604.00
B. EXPENDITURES					
1. Certificated Salaries					
Certificated Teachers' Salaries	1100	3,918,699.92	3,098,210.46	905,863.13	4,004,073.59
Certificated Pupil Support Salaries	1200	0.00	-	-	0.00
Certificated Supervisors' and Administrators' Salaries	1300	260,467.00	273,595.00	-	273,595.00
Other Certificated Salaries	1900	0.00	-	-	0.00
Total, Certificated Salaries		4,179,166.92	3,371,805.46	905,863.13	4,277,668.59
2. Non-certificated Salaries					
Non-certificated Instructional Aides' Salaries	2100	427,397.04	478,868.76	-	478,868.76
Non-certificated Support Salaries	2200	0.00	-	-	0.00
Non-certificated Supervisors' and Administrators' Sal.	2300	249,050.87	319,604.40	-	319,604.40
Clerical and Office Salaries	2400	281,607.52	273,060.75	-	273,060.75
Other Non-certificated Salaries	2900	0.00	-	-	0.00
Total, Non-certificated Salaries		958,055.44	1,071,533.91	0.00	1,071,533.91

Description	Object Code	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
3. Employee Benefits					
STRS	3101-3102	0.00	-	-	0.00
PERS	3201-3202	0.00	-	-	0.00
OASDI / Medicare / Alternative	3301-3302	392,997.51	339,915.46	69,298.53	409,213.99
Health and Welfare Benefits	3401-3402	259,406.40	122,569.52	151,752.74	274,322.27
Unemployment Insurance	3501-3502	147,542.37	131,180.42	27,574.89	158,755.31
Workers' Compensation Insurance	3601-3602	71,921.11	62,206.75	12,682.08	74,888.84
OPEB, Allocated	3701-3702	0.00	-	-	0.00
OPEB, Active Employees	3751-3752	0.00	-	-	0.00
Other Employee Benefits	3901-3902	377,232.48	176,988.37	215,900.84	392,889.21
Total, Employee Benefits		1,249,099.87	832,860.52	477,209.09	1,310,069.62

4. Books and Supplies					
Approved Textbooks and Core Curricula Materials	4100	0.00	-	-	0.00
Books and Other Reference Materials	4200	7,343.90	7,490.78	-	7,490.78
Materials and Supplies	4300	1,156,525.00	1,168,110.04	21,801.58	1,189,911.62
Noncapitalized Equipment	4400	15,150.00	15,453.00	-	15,453.00
Food	4700	56,350.00	57,477.00	-	57,477.00
Total, Books and Supplies		1,235,368.90	1,248,530.82	21,801.58	1,270,332.40
5. Services and Other Operating Expenditures					
Subagreements for Services	5100	0.00	-	-	0.00
Travel and Conferences	5200	10,300.00	10,506.00	-	10,506.00
Dues and Memberships	5300	5,515.65	5,625.96	-	5,625.96
Insurance	5400	66,330.00	68,299.20	-	68,299.20
Operations and Housekeeping Services	5500	36,360.80	37,088.02	-	37,088.02
Rentals, Leases, Repairs, and Noncap. Improvements	5600	243,388.67	244,902.00	-	244,902.00
Transfers of Direct Costs	5700-5799				0.00
Professional/Consulting Services and Operating Expend.	5800	1,614,491.97	583,199.37	974,790.75	1,557,990.12
Communications	5900	8,155.60	8,318.71	-	8,318.71
Total, Services and Other Operating Expenditures		1,984,542.69	957,939.26	974,790.75	1,932,730.01
6. Capital Outlay (Objects 6100-6170, 6200-6500 - modified accrual basis)					
Land and Improvements of Land	6100-6170	0.00	-	-	0.00
Buildings and Improvements of Buildings	6200	0.00	-	-	0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0.00	-	-	0.00
Equipment	6400	0.00	-	-	0.00
Equipment Replacement	6500	0.00	-	-	0.00
<i>Depreciation Expense (for accrual basis only)</i>	6900	0.00	-	-	0.00
Total, Capital Outlay		0.00	0.00	0.00	0.00
7. Other Outgo					
Tuition to Other Schools	7110-7143				0.00
Transfers of Pass-through Revenues to Other LEAs	7211-7213				0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE				0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO				0.00
All Other Transfers	7281-7299	0.00	-	-	0.00
Transfers of Indirect Costs	7300-7399	0.00	-	-	0.00
Debt Service:					
Interest	7438	454.00	198.00	-	198.00
Principal	7439	0.00	-	-	0.00
Total, Other Outgo		454.00	198.00	0.00	198.00
8. TOTAL EXPENDITURES		9,606,687.81	7,482,867.98	2,379,664.56	9,862,532.53
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		285,364.30	1,446,206.45	(1,162,134.99)	284,071.46

Description	Object Code	Est. Actuals Prior Year	Current Budget Year		Total
			Unrest.	Rest.	
D. OTHER FINANCING SOURCES / USES					
1. Other Sources	8930-8979				0.00
2. Less: Other Uses	7630-7699				0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999		(1,162,134.99)	1,162,134.99	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		0.00	(1,162,134.99)	1,162,134.99	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		285,364.30	284,071.46	0.00	284,071.46
F. FUND BALANCE, RESERVES					
1. Beginning Fund Balance					
a. As of July 1	9791	2,713,105.00	3,032,238.30	0.00	3,032,238.30
b. Adjustments to Beginning Balance	9793, 9795	33,769.00	0.00	0.00	0.00
c. Adjusted Beginning Balance		2,746,874.00	3,032,238.30	0.00	3,032,238.30
2. Ending Fund Balance, June 30 (E + F.1.c.)		3,032,238.30	3,316,309.76	0.00	3,316,309.76
Components of Ending Fund Balance (Modified Accrual Basis)					
a. Nonspendable					
Revolving Cash	9711				0.00
Stores	9712				0.00
Prepaid Expenditures	9713				0.00
All Others	9719				0.00
b. Restricted	9740				0.00
c. Committed					0.00

Stabilization Arrangements	9750				0.00
Other Commitments	9760				0.00
d. Assigned					0.00
Other Assignments	9780				0.00
e. Unassigned/Unappropriated					0.00
Reserve for Economic Uncertainties	9789	480,334.39	493,126.63		493,126.63
Unassigned / Unappropriated Amount	9790M				0.00
Components of Ending Net Position (Accrual Basis)					
1. Net Investment in Capital Assets	9796				-
2. Restricted Net Position	9797				-
3. Unrestricted Net Position	9790A	2,551,904	2,823,183	-	2,823,183

**CHARTER SCHOOL
MULTI-YEAR PROJECTION - ALTERNATIVE FORM**

Charter School Name: Heartwood Charter
 (continued) 0
 CDS #: 49-70797-0139568
 Charter Approving Entity: Liberty Elementary
 County: Sonoma
 Charter #: 2071
 Fiscal Year: 2025-26

This charter school uses the following basis of accounting:

- 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	FY 2025-26			Totals for 2026-27	Totals for 2027-28
		Unrestricted	Restricted	Total		
A. REVENUES						
1. LCFF/Revenue Limit Sources						
State Aid - Current Year	8011	5,100,806.66	0.00	5,100,806.66	5,416,709.48	5,731,927.75
Education Protection Account State Aid - Current Year	8012	142,848.00	0.00	142,848.00	144,960.00	144,960.00
State Aid - Prior Years	8019	0.00	0.00	0.00	0.00	0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	3,393,381.74	0.00	3,393,381.74	3,466,561.32	3,459,840.05
Other LCFF Transfers	8091, 8097	0.00	0.00	0.00		
Total, LCFF Sources		8,637,036.40	0.00	8,637,036.40	9,028,230.80	9,336,727.80
2. Federal Revenues						
No Child Left Behind/Every Student Succeeds Act	8290	0.00	0.00	0.00	0.00	0.00
Special Education - Federal	8181, 8182	0.00	107,155.00	107,155.00	107,880.00	109,475.00
Child Nutrition - Federal	8220	0.00	0.00	0.00	0.00	0.00
Donated Food Commodities	8221	0.00	0.00	0.00		
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00	0.00	0.00
Total, Federal Revenues		0.00	107,155.00	107,155.00	107,880.00	109,475.00
3. Other State Revenues						
Special Education - State	StateRevSE	0.00	716,920.91	716,920.91	722,799.90	722,799.90
All Other State Revenues	StateRevAO	219,038.03	393,453.65	612,491.68	399,054.70	401,413.00
Total, Other State Revenues		219,038.03	1,110,374.57	1,329,412.60	1,121,854.60	1,124,212.90
4. Other Local Revenues						
All Other Local Revenues	LocalRevAO	73,000.00	0.00	73,000.00	73,000.00	73,000.00
Total, Local Revenues		73,000.00	0.00	73,000.00	73,000.00	73,000.00
5. TOTAL REVENUES		8,929,074.43	1,217,529.57	10,146,604.00	10,330,965.40	10,643,415.70
B. EXPENDITURES						
1. Certificated Salaries						
Certificated Teachers' Salaries	1100	3,098,210.46	905,863.13	4,004,073.59	4,124,195.80	4,247,921.67
Certificated Pupil Support Salaries	1200	0.00	0.00	0.00	0.00	0.00
Certificated Supervisors' and Administrators' Salaries	1300	273,595.00	0.00	273,595.00	281,802.85	290,256.94
Other Certificated Salaries	1900	0.00	0.00	0.00	0.00	0.00
Total, Certificated Salaries		3,371,805.46	905,863.13	4,277,668.59	4,405,998.65	4,538,178.61
2. Non-certificated Salaries						
Non-certificated Instructional Aides' Salaries	2100	478,868.76	0.00	478,868.76	493,234.82	508,031.87
Non-certificated Support Salaries	2200	0.00	0.00	0.00	0.00	0.00
Non-certificated Supervisors' and Administrators' Sal.	2300	319,604.40	0.00	319,604.40	329,192.54	339,068.31
Clerical and Office Salaries	2400	273,060.75	0.00	273,060.75	281,252.57	289,690.15
Other Non-certificated Salaries	2900	0.00	0.00	0.00	0.00	0.00
Total, Non-certificated Salaries		1,071,533.91	0.00	1,071,533.91	1,103,679.93	1,136,790.32

Description	Object Code	FY 2025-26			Totals for 2026-27	Totals for 2027-28
		Unrestricted	Restricted	Total		
3. Employee Benefits						
STRS	3101-3102	0.00	0.00	0.00	0.00	0.00
PERS	3201-3202	0.00	0.00	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	339,915.46	69,298.53	409,213.99	421,490.41	434,135.12
Health and Welfare Benefits	3401-3402	122,569.52	151,752.74	274,322.27	279,808.71	285,404.89
Unemployment Insurance	3501-3502	131,180.42	27,574.89	158,755.31	163,423.89	168,232.53
Workers' Compensation Insurance	3601-3602	62,206.75	12,682.08	74,888.84	77,135.50	79,449.57
OPEB, Allocated	3701-3702	0.00	0.00	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00	0.00	0.00
Other Employee Benefits	3901-3902	176,988.37	215,900.84	392,889.21	404,675.89	416,816.16
Total, Employee Benefits		832,860.52	477,209.09	1,310,069.62	1,346,534.40	1,384,038.27
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	0.00	0.00	0.00	0.00	0.00

Books and Other Reference Materials	4200	7,490.78	0.00	7,490.78	7,640.59	7,793.41
Materials and Supplies	4300	1,168,110.04	21,801.58	1,189,911.62	1,256,979.15	1,282,118.73
Noncapitalized Equipment	4400	15,453.00	0.00	15,453.00	15,762.06	16,077.30
Food	4700	57,477.00	0.00	57,477.00	58,626.54	59,799.07
Total, Books and Supplies		1,248,530.82	21,801.58	1,270,332.40	1,339,008.34	1,365,788.51
5. Services and Other Operating Expenditures						
Subagreements for Services	5100	0.00	0.00	0.00	0.00	0.00
Travel and Conferences	5200	10,506.00	0.00	10,506.00	10,716.12	10,930.44
Dues and Memberships	5300	5,625.96	0.00	5,625.96	5,738.48	5,853.25
Insurance	5400	68,299.20	0.00	68,299.20	70,695.18	72,109.08
Operations and Housekeeping Services	5500	37,088.02	0.00	37,088.02	37,829.78	38,586.37
Rentals, Leases, Repairs, and Noncap. Improvements	5600	244,902.00	0.00	244,902.00	249,800.04	254,796.04
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00		
Professional/Consulting Services and Operating Expend.	5800	583,199.37	974,790.75	1,557,990.12	1,610,717.01	1,642,003.36
Communications	5900	8,318.71	0.00	8,318.71	8,485.09	8,654.79
Total, Services and Other Operating Expenditures		957,939.26	974,790.75	1,932,730.01	1,993,981.70	2,032,933.34
6. Capital Outlay (Obj. 6100-6170, 6200-6500 for mod. accr. basis only)						
Land and Land Improvements	6100-6170	0.00	0.00	0.00	0.00	0.00
Buildings and Improvements of Buildings	6200	0.00	0.00	0.00	0.00	0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0.00	0.00	0.00	0.00	0.00
Equipment	6400	0.00	0.00	0.00	0.00	0.00
Equipment Replacement	6500	0.00	0.00	0.00	0.00	0.00
Depreciation Expense (for accrual basis only)	6900	0.00	0.00	0.00	0.00	0.00
Total, Capital Outlay		0.00	0.00	0.00	0.00	0.00
7. Other Outgo						
Tuition to Other Schools	7110-7143	0.00	0.00	0.00		
Transfers of Pass-through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00		
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0.00	0.00	0.00		
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00		
All Other Transfers	7280-7299	0.00	0.00	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00	0.00	0.00
Debt Service:						
Interest	7438	198.00	0.00	198.00	0.00	0.00
Principal (for modified accrual basis only)	7439	0.00	0.00	0.00	0.00	0.00
Total, Other Outgo		198.00	0.00	198.00	0.00	0.00
8. TOTAL EXPENDITURES		7,482,867.98	2,379,664.56	9,862,532.53	10,189,203.02	10,457,729.05
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		1,446,206.45	(1,162,134.99)	284,071.46	141,762.38	185,686.65

Description	Object Code	FY 2025-26			Totals for 2026-27	Totals for 2027-28
		Unrestricted	Restricted	Total		
D. OTHER FINANCING SOURCES / USES						
1. Other Sources	8930-8979	0.00	0.00	0.00		
2. Less: Other Uses	7630-7699	0.00	0.00	0.00		
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(1,162,134.99)	1,162,134.99	0.00		
4. TOTAL OTHER FINANCING SOURCES / USES		(1,162,134.99)	1,162,134.99	0.00	0.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		284,071.46	0.00	284,071.46	141,762.38	185,686.65
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	3,032,238.30	0.00	3,032,238.30	3,316,309.76	3,458,072.14
b. Adjustments to Beginning Balance	9793, 9795	0.00	0.00	0.00		
c. Adjusted Beginning Balance		3,032,238.30	0.00	3,032,238.30	3,316,309.76	3,458,072.14
2. Ending Fund Balance, June 30 (E + F.1.c.)		3,316,309.76	0.00	3,316,309.76	3,458,072.14	3,643,758.79
Components of Ending Fund Balance:						
a. Nonspendable						
Revolving Cash (equals object 9130)	9711	0.00	0.00	0.00		
Stores (equals object 9320)	9712	0.00	0.00	0.00		
Prepaid Expenditures (equals object 9330)	9713	0.00	0.00	0.00		
All Others	9719	0.00	0.00	0.00		
b. Restricted	9740	0.00	0.00	0.00		
c. Committed						
Stabilization Arrangements	9750	0.00	0.00	0.00		
Other Commitments	9760	0.00	0.00	0.00		
d. Assigned						
Other Assignments	9780	0.00	0.00	0.00		
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	493,126.63	0.00	493,126.63	509,460.15	522,886.45
Unassigned/Unappropriated Amount	9790	0.00	0.00	0.00		

Components of Ending Net Position (Accrual Basis)						
1. Net Investment in Capital Assets	9796	0.00	0.00	0.00		
2. Restricted Net Position	9797	0.00	0.00	0.00		
3. Unrestricted Net Position	9790A	2,823,183.14	0.00	2,823,183.14	2,948,611.99	3,120,872.33

Addendum to Board Enrollment Policy for 2025-26
June 24, 2025 Proposed

The following enrollment preferences will be implemented, provided there is space in the desired program and grade, and in accordance with the following priority:

1. Returning students, currently enrolled at Heartwood Charter School for the 2024-25 school year.
2. Siblings of returning students, currently enrolled at Heartwood Charter School.
3. Children of Heartwood staff, faculty and board members who are new applicants to Heartwood Charter School. Children of Heartwood staff will have priority as approved by School Administration, regardless of Class Enrollment status or whether class is full, closed or frozen, and ahead of waitlisted students.
4. Previously enrolled Bothin Program Kindergarten students, who are applying for K or 1st grade.
5. New enrollees for Bothin Program Kindergarten, who are not in any above group, with a public lottery to be held if Intent to Enroll forms exceed available space.
6. Waitlisted students, in order of receipt of 2024-25 Intent to Enroll forms.

Permanent Changes to Enrollment Policy

1. Admissions to the Independent Study and Bothin Programs will be made on a first come, first serve basis, based on date and time of completed Intent to Enroll form.
2. Children of Heartwood staff are given priority enrollment, regardless of Enrollment Status of program or class, subject to approval by Administration.
3. For the Bothin Program Transitional Kindergarten and Kindergarten groups, a public lottery will be held if the programs are oversubscribed.
4. Once admission is made to a program and geographic area, a student may not change program or geographic area for the remainder of the school year.

Enrollment Maximum Limits

Homeschool Program Target	568
Homeschool Program Peak (allows siblings)	585
Homeschool Program K Additional Enrollment	30
Homeschool Program Total	615
Bothin Program	195
Total Enrollment	815

The enrollment limits shall be filled according to the following priority:

1. The Homeschool students shall be admitted in order of date and time of receipt of Intent to Enroll forms.
2. The Homeschool TK/K students shall have priority up to 100 students, at least 40 of which shall be TK. This priority is ahead of new students in other grades.
3. The Homeschool Program Marin Resident limit will be reached when the first of either of the Marin Resident limit or the Homeschool Total limit is reached, if enrollment between counties is met.
4. Any change of any of these maximum limits will require action by Heartwood's Board of Directors.



HEARTWOOD

CHARTER SCHOOL

Instructional Continuity Plan
For Non-Classroom Based Schools that Provide In-Person Instruction

Board Adopted: June 24, 2025

TABLE OF CONTENTS

INTRODUCTION 3

DEFINITIONS 3

STUDENT AND FAMILY ENGAGEMENT 3

 Initial Notification..... 4

 Remote Instruction..... 4

 Communication..... 5

INSTRUCTION AND ASSESSMENT 6

 Independent Study Agreements 6

 Course Content..... 6

 Assessments 6

 Academic Support..... 6

EQUITABLE ACCESS 6

 Students with Disabilities 7

 English Learners 7

 Foster Students and Students Experiencing Homelessness 7

 Mental Health Needs..... 8

ADDITIONAL SUPPORT SERVICES 8

 Meals..... 8

 Alternative Sources of Electricity & Internet 8

 After School Care 8

RETURN TO IN-PERSON LEARNING 9

Board Policy Instructional Continuity Plan

June 24, 2025 Proposed

INTRODUCTION

Pursuant to Senate Bill 153 and California Education Code section 32282, subdivision (a)(3)(A), Heartwood Charter School (“HCS” or “Charter School”) adopts the following Instructional Continuity Plan (“ICP”) to establish communication with students and their families and provide instruction to students when in-person instruction is disrupted due to a qualifying emergency or a natural disaster pursuant to California Education Code 41422 and 43692(a), and it materially reduces the Charter School’s average daily attendance (“Emergency Event”).

The Instructional Continuity Plan (“ICP”) states how HCS will:

1. Establish communication with students and families not later than five (5) calendar days of an Emergency Event that disrupts in-person education, with the goal being to establish two-way communication and to identify and provide students with social-emotional, mental health, and academic supports; and
2. Establish access to alternative in-person instruction, remote instruction, or a hybrid model no more than ten (10) instructional days after an Emergency Event disrupts in-person education.

DEFINITIONS

“Remote Learning” means instruction in which the student and certificated teacher are in different locations and instruction shall be aligned with traditional independent study per Education Code 51745-51747.5. Instructional time shall be based on the time value of the learning tasks and assignments delegated by the teacher.

“In-person instruction” means instruction under the immediate physical supervision and control of a certificated employee of the Charter School while engaged in educational activities required of the student at the Charter School’s Resource Center(s) or at an alternative location, such as another school that may be site-based.

“Two-way communication” may include phone calls, email, or instant messaging through ParentSquare, the Charter School’s portal.

“Emergency or natural disaster” may include wildfires, earthquakes, severe weather, floods, landslides, tsunamis, pandemic, infectious disease outbreaks, chemical/hazardous materials spill or threat, etc.

STUDENT AND FAMILY ENGAGEMENT

To provide consistency during an Emergency Event, the Charter School’s primary mode of communication shall be through ParentSquare. This platform provides a secure environment to communicate with each student and their parent/guardian through instant messages, classroom postings, flyers, and embedded documents. In addition to ParentSquare, teachers will communicate with parents/guardians on a regular basis through traditional communication channels (i.e. phone calls, online classroom postings, Zoom, etc.) regarding each student’s academic progress, attendance/participation, behavior, and social-emotional well-being.

Board Policy Instructional Continuity Plan

June 24, 2025 Proposed

Initial Notification

HCS shall:

Engage students and families as soon as practicable following an Emergency Event that disrupts in-person learning. The initial communication establishing two-way communication with students and their families shall occur no later than five (5) calendar days following an Emergency Event. This communication shall:

- Notify students and families that in-person instruction at Resource Centers or remote instruction will be disrupted as a result of the emergency or natural disaster;
- Provide students and families with a status update, based on the most up-to-date and credible sources available, on the nature and extent of the emergency or natural disaster;
- Inform the Charter School community of the methods the school will use to communicate with students and families while in-person instruction is disrupted;
- Request that students and families check in and report their physical well-being, as well as any immediate social-emotional, mental health, and academic needs;
- Provide support for students' social-emotional, mental health, and academic needs by using internal resources to the extent available, and by referring families to any community-based or emergency-focused resources and services providers that may be available; and

Remote Instruction

Charter School shall provide access to in-person, remote, or hybrid instruction as soon as practicable, but no more than ten (10) instructional days following the emergency or natural disaster, which includes:

- If in-person instruction is not feasible, the Charter School will transfer the in-person instruction to remote instruction pursuant to HCS's Independent Study Policy and procedures;
- Provide access to instructional resources such as a laptop, internet, and instructional materials to participate in remote instruction as follows: pick up at the Bothin Resource Center, through CST intervention and our Lending Library members
- If the online portal is not accessible due to unforeseen disruptions, students and families will be provided with Zoom access to ensure schoolwork from teachers related to assignments, instruction, and assessments is uninterrupted; or
- If an Emergency Event disrupts in-person learning and independent study is not feasible, a student may also be offered enrollment in or be temporarily reassigned to another site, school district, county office of education, or charter school¹. This information will be determined on a case-by-

¹ When a student is temporarily reassigned to another LEA outside of the school district in which the student's parent(s) or guardian resides, then, notwithstanding any other law, that student shall be deemed to have complied with the residency

Board Policy Instructional Continuity Plan

June 24, 2025 Proposed

case basis and communicated to each impacted family. The Charter School has established partnerships with Liberty Elementary School District to temporarily support HCS's students

Communication

HCS' communication platform is ParentSquare and all communications regarding an Emergency Event will be posted on this platform, which is accessible to all students, parents/guardians, and HCS employees.

ParentSquare will also be used to provide instructions to the school community regarding how and when families will access instruction, academic supports, social-emotional resources, and important updates regarding when in-person instruction will resume at the Resource Center(s).

Other forms of communication will be as follows:

- Questions regarding academic instruction, assessments, homework, etc. will occur through ParentSquare;
- Teachers will communicate with parents/guardians on a regular basis through traditional communication channels (i.e. ParentSquare, Google Classroom, etc);
- The Charter School's website and ParentSquare will:
 - Identify whether instruction may continue through in-person, remote, or hybrid;
 - Provide updates and solutions about the impact the Emergency Event is having on providing in-person, remote, or hybrid instruction; and
 - Provide an outlook for when and how normal operations will resume through the Charter School's ParentSquare, and when in-person or remote instruction will resume.
- If the Emergency Event has negatively impacted power or internet services, flyers will be posted at local community centers, libraries, and other publicly accessible locations.

This information will be provided upon the Charter School's emergency closure and updated every day.

INSTRUCTION AND ASSESSMENT

Independent Study Agreements

All students will be asked to sign an independent study agreement during the enrollment/re-enrollment period every year to ensure agreements are in place prior to an Emergency Event that limits or prevents access to the school site.

Course Content

The Charter School shall provide content aligned to grade level standards that are substantially equivalent to in-person instruction. For high school grade levels, this shall include access to all courses offered by

requirements for attendance in the LEA that is temporarily serving the student pursuant to this ICP.

Board Policy Instructional Continuity Plan

June 24, 2025 Proposed

the Charter School for graduation and approved by the UC or CSU as creditable under the A-G admissions criteria.

Assessments

Teachers will use the following assessment tools to check for student understanding: Renaissance/STAR.

The Charter School will use multiple assessment tools to determine each student's areas of progress and growth, including: Renaissance/STAR, IXL, AMIRA.

Each student and their parent/guardian will receive confidential results of the above assessments through Regonline

Academic Support

Students demonstrating the need for additional support will be contacted by Academic Specialists and Special Education to discuss remedial measures or to convene a Student Support Team ("SST"), Section 504, or Individualized Education Program ("IEP") Team meeting to review additional accommodations, services, or support.

Teachers will maintain virtual office hours to provide students or a student's parent/guardian the opportunity to clarify assignments, request additional academic support, or address other areas of concern. Each teacher's office hours will be posted within their virtual classroom.

EQUITABLE ACCESS

The Charter School shall utilize its multi-tiered systems of support ("MTSS") to address the needs of students who are not performing at grade level, or who need support in other areas, such as English Learners, students in foster care or students who are experiencing homelessness, and/or students requiring mental health support. The Charter School complies with the Individuals with Disabilities Education Act ("IDEA") and is committed to meeting the needs of individuals with exceptional needs in order to be consistent with the student's individualized education program ("IEP"). Policies, procedures, and guidelines are in place to ensure that students are identified, assessed, and provided a free appropriate public education ("FAPE") in the least restrictive environment. The Charter School complies with Section 504 of the federal Rehabilitation act of 1973 (29 U.S.C. Sec. 794) and is committed to providing equivalent access to and providing a FAPE to all students with disabilities.

Students with Disabilities

The Charter School shall provide and maintain all accommodations and services in accordance with the emergency alternative plan outlined within each student's IEP and Section 504 Plan.

The Director of Special Education will oversee the implementation of each student's IEP within the remote learning environment. All inquiries related to a student's IEP should be directed to Director of Special Education at Heather Deyden (sped@heartwoodcharterschool.org).

Board Policy Instructional Continuity Plan **June 24, 2025 Proposed**

The Bothin School Counselor will oversee the implementation of each student's Section 504 Plan within the remote learning environment. All inquiries related to a student's Section 504 Plan should be directed to the Bothin School Counselor at sped@heartwoodcharterschool.org.

English Learners

All students who are English Learners ("EL") will receive English Language Development ("ELD") support while enrolled in remote learning. Each teacher will be responsive to each EL students' different strengths, needs and identities, and support the socio-emotional health and development of ELs through structured lessons that explicitly target language development skills in reading, writing, listening, and speaking, interactive activities, scaffolding, visual aids, differentiated instruction to meet each student's unique needs.

The ELPAC Coordinator will oversee the implementation of designated and integrated ELD within the remote learning environment. All inquiries related to an EL should be directed to the ELPAC Coordinator at scott@heartwoodcharterschool.org.

Foster Students and Students Experiencing Homelessness

A student in foster care or a student who is experiencing homelessness will be provided additional support through the Charter School's MTSS and may contact the Homeless and Foster Student Liaison at Heather@heartwoodcharterschool.org for additional support.

The National Center for Homeless Education's Helpline is also staffed Monday-Friday, 9:00 AM to 5:30 PM Eastern Time. Email: NCHE.helpline@safalpartners.com or phone: +1 305-306-8495.

Mental Health Needs

HCS recognizes that when an Emergency Event occurs it can cause unidentified and unaddressed mental health challenges. Access to mental health services is not only critical to improving the physical and emotional safety of students and employees, but it also helps address barriers to learning and provides support so that all students can learn problem-solving skills and achieve in school and, ultimately, in life. The following resources are available to your child during an emergency:

Available through the Charter School: 30 minute weekly remote counseling sessions with School Counselors, to request this please email sped@heartwoodcharterschool.org.

Available in the Community:

- **National Suicide Prevention Lifeline**
In a crisis, call 9-1-1 or the National Suicide Prevention Lifeline at 1-800-273-TALK (8255).
- **Sonoma County Warm Line**
Call (707) 565-2652 for free and private support if you or someone you know is experiencing emotional stress and anxiety during the COVID-19

Board Policy Instructional Continuity Plan

June 24, 2025 **Proposed**

pandemic. This warm line is available 7 days a week from 10:00 a.m. to 7:00 p.m. Telephone interpretation is available for other languages.

- **24-hour Emergency Mental Health**
Hotline (800) 746-8181
- **North Bay Suicide Prevention**
Hotline (855) 587-6373
- **Socoemergency.org:**
This website, maintained by the County of Sonoma, offers a range of supports and resources.
- **Virtual Local Assistance Center (VLAC)**
The Virtual Local Assistance Center (VLAC) is a resource listing of governments and support services to help residents impacted by COVID-19.
- <https://www.huckleberryyouth.org/counseling-programs/>
- **APPLE FamilyWorks** (415) 492-0720
- **Asian Advocacy Project** (415) 491-9677
- **Comm. Institute for Psychotherapy** (415) 459-5999
- **Comm. Violence Solutions** 1-800-670-7273
- **Enterprise Resource Center** (415) 457-4554
- **Family Service Agency** (415) 491-5700
- **Hospice by the Bay (Grief)** (415) 927-2273
- **Jewish Family & Children Services** (415) 491-7960
- **Marin Interfaith Street Chaplaincy** (415) 302-0248
- **Novato Youth Center** (415) 892-1643

Available Nationally:

- National Suicide Prevention Hotline - This organization provides confidential support for adults and youth in distress, including prevention and crisis resources. Available 24 hours at 988 or 1-800-273-8255.
- The Trevor Project - This organization provides suicide prevention and crisis intervention for LGBTQ youth between the ages of 13 and 24. **Available at 1-866-488-7386 or visit <https://www.thetrevorproject.org/>.**
- Big Brothers/Big Sisters of America – This organization is a community- based mentorship program. Community-specific program information can be found online at <https://www.bbbs.org> or by calling (813) 720-8778.

ADDITIONAL SUPPORT SERVICES

Meals

If meal service is disrupted **at the** Charter School, meals will be provided through the following methods: Sonoma County Office of Education and Marin County Office of Education locations, depending on availability.

Board Policy Instructional Continuity Plan

June 24, 2025 Proposed

Alternative Sources of Electricity & Internet

If power and internet are lost in only a minority of areas, the Charter School will contract with ATT to provide mobile electricity and internet access to reduce interruptions to student learning in affected areas.

RETURN TO IN-PERSON LEARNING

The conditions to be met prior to returning to in-person learning may include, but are not limited to the following:

- Evacuation orders lifted
- Power and utilities functioning
- Healthy air quality
- Access to safe and clean water
- Campus is free from debris and hazards
- Internet fiber lines are connected and functioning
- Staff are available to cover those affected by the Emergency Event
- Kitchen is up and running for meals



HEARTWOOD

CHARTER SCHOOL

TITLE IX, HARASSMENT, INTIMIDATION, DISCRIMINATION, AND BULLYING POLICY

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]

Discrimination, sexual harassment, harassment, intimidation, and bullying are all disruptive behaviors, which interfere with students' ability to learn, negatively affect student engagement, diminish school safety, and contribute to a hostile school environment. As such, Heartwood Charter School ("HCS" or the "Charter School") prohibits any acts of discrimination, sexual harassment, harassment, intimidation, and bullying altogether.

As used in this policy, discrimination, sexual harassment, harassment, intimidation, and bullying are described as the intentional conduct, including verbal, physical, written communication or cyber-bullying, including cyber sexual bullying, based on the actual or perceived characteristics of mental or physical disability, sex (including pregnancy and related conditions, and parental status), sexual orientation, gender, gender identity, gender expression, immigration status, nationality (including national origin, country of origin, and citizenship), race or ethnicity (including ancestry, color, ethnic group identification, ethnic background, and traits associated with race, including, but not limited to, hair texture and protective hairstyles such as braids, locs, and twists), religion (including agnosticism and atheism), religious affiliation, medical condition, genetic information, marital status, age, or any combination of those characteristics, association with a person or group with one or more of these actual or perceived characteristics or any combination of those characteristics, or based on any other characteristic protected under applicable state or federal law or local ordinance. Hereafter, such actions are referred to as "misconduct prohibited by this Policy."

To the extent possible, the Charter School will make reasonable efforts to prevent students from being discriminated against, harassed, intimidated, and/or bullied, and will take action to investigate, respond, address and report on such behaviors in a timely manner. HCS school staff who witness acts of misconduct prohibited by this Policy will take immediate steps to intervene when safe to do so.

Moreover, the Charter School will not condone or tolerate misconduct prohibited by this Policy by any employee, independent contractor or other person with whom HCS does business, or any other individual, student, or volunteer. HCS will promptly and thoroughly investigate and respond to any complaint of misconduct prohibited by this Policy in a manner that is not deliberately indifferent and will take appropriate corrective action, if warranted.

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]

This policy applies to incidents occurring on the school campus, at school-sponsored events and activities regardless of the location, through school-owned technology, and through other electronic means, whether perpetrated by a student, employee, parent/guardian, volunteer, independent contractor or other person with whom HCS does business, and all acts of HCS's Board of Directors ("Board") in enacting policies and procedures that govern HCS.

HCS complies with all applicable state and federal laws and regulations and local ordinances in its investigation of and response to reports of misconduct prohibited by this Policy.

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

Heather Deyden
Asst Director of Operations
Heather@heartwoodcharterschool.org

Definitions

Harassment means conduct based upon one or more of the protected characteristics listed above that is severe or pervasive, which unreasonably disrupts an individual's educational or work environment or that creates a hostile educational or work environment. Harassment includes, but is not limited to:

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

Sexual Harassment

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

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

Under Title IX, "sexual harassment" means conduct on the basis of sex that satisfies one or more of the following:

- An employee of the recipient conditioning the provision of an aid, benefit, or service of the recipient on an individual's participation in unwelcome sexual conduct;

- Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the recipient's education program or activity; or
- “Sexual assault” as defined in 20 U.S.C. 1092(f)(6)(A)(v), “dating violence” as defined in 34 U.S.C. 12291(a)(10), “domestic violence” as defined in 34 U.S.C. 12291(a)(8), or “stalking” as defined in 34 U.S.C. 12291(a)(30).

Under California Education Code section 212.5, sexual harassment consists of conduct on the basis of sex, including but not limited to unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct on the basis of sex, regardless of whether or not the conduct is motivated by sexual desire, when: (a) Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's employment, education, academic status, or progress; (b) submission to, or rejection of, the conduct by the individual is used as the basis of employment, educational or academic decisions affecting the individual; (c) the conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment; and/or (d) submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

Examples of conduct that may fall within the Title IX definition of sexual harassment, the Education Code definition of sexual harassment, or both:

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

- Reading publicly or otherwise publicizing in the work or educational environment materials that are in any way sexually revealing, sexually suggestive, sexually demeaning or pornographic.
- Displaying signs or other materials purporting to segregate an individual by sex in an area of the work or educational environment (other than restrooms or similar rooms).

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

Bullying is defined as any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act. Bullying includes one or more acts committed by a student or group of students that may constitute hate violence or create an intimidating and/or hostile educational environment, directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:

- Placing a reasonable student¹ or students in fear of harm to that student's or those students' person or property.
- Causing a reasonable student to experience a substantially detrimental effect on the student's physical or mental health.
- Causing a reasonable student to experience a substantial interference with the student's academic performance.
- Causing a reasonable student to experience a substantial interference with the student's ability to participate in or benefit from the services, activities, or privileges provided by HCS.

Cyberbullying is an electronic act that includes the transmission of harassing communication, direct threats, or other harmful texts, sounds, video or images on the Internet, social media, or other technologies using a telephone, computer, or any wireless communication device. Cyberbullying also includes breaking into another person's electronic account and assuming that person's identity in order to damage that person's reputation.

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

- A message, text, sound, video, or image.
- A post on a social network Internet Web site including, but not limited to:
 - Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in the definition of "bullying," above.

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

- Creating a credible impersonation of another actual student for the purpose of having one or more of the effects listed in the definition of “bullying,” above. “Credible impersonation” means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
- Creating a false profile for the purpose of having one or more of the effects listed in the definition of “bullying,” above. “False profile” means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.
- An act of “Cyber sexual bullying” including, but not limited to:
 - The dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in the definition of “bullying,” above. A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
 - “Cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
- Notwithstanding the definitions of “bullying” and “electronic act” above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

Formal Complaint of Sexual Harassment means a written document filed and signed by a complainant who is participating in or attempting to participate in HCS’s education program or activity or signed by the Coordinator alleging sexual harassment against a respondent and requesting that HCS investigate the allegation of sexual harassment. At the time of filing a formal complaint of sexual harassment, a complainant must be participating in or attempting to participate in HCS’s education program or activity.

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

Bullying and Cyberbullying Prevention Procedures

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

Cyberbullying Prevention Procedures

HCS advises students:

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

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]

- That personal information revealed on social media can be shared with anyone including parents, teachers, administrators, and potential employers. Students should never reveal information that would make them uncomfortable if the world had access to it.
- To consider how it would feel receiving such comments before making comments about others online.

HCS informs its employees, students, and parents/guardians of HCS's policies regarding the use of technology in and out of the classroom. HCS encourages parents/guardians to discuss these policies with their children to ensure their children understand and comply with such policies.

Education

HCS employees cannot always be present when bullying incidents occur, so educating students about bullying is a key prevention technique to limit bullying from happening. HCS advises students that hateful and/or demeaning behavior is inappropriate and unacceptable in our society and at HCS and encourages students to practice compassion and respect each other.

HCS educates students to accept all student peers regardless of protected characteristics (including but not limited to actual or perceived sexual orientation, gender identification, physical or cognitive disabilities, race, ethnicity, religion, and immigration status) and about the negative impact of bullying other students based on protected characteristics.

HCS's bullying prevention education also discusses the differences between appropriate and inappropriate behaviors and includes sample situations to help students learn and practice appropriate behavior and to develop techniques and strategies to respond in a non-aggressive way to bullying-type behaviors. Students will also develop confidence and learn how to advocate for themselves and others, and when to go to an adult for help.

HCS informs HCS employees, students, and parents/guardians of this Policy and encourages parents/guardians to discuss this Policy with their children to ensure their children understand and comply with this Policy.

Professional Development

HCS annually makes available the online training module developed by the California Department of Education pursuant Education Code section 32283.5(a) to its certificated employees and all other HCS employees who have regular interaction with students.

HCS informs certificated employees about the common signs that a student is a target of bullying including:

- Physical cuts or injuries
- Lost or broken personal items
- Fear of going to school/practice/games
- Loss of interest in school, activities, or friends
- Trouble sleeping or eating
- Anxious/sick/nervous behavior or distracted appearance
- Self-destructiveness or displays of odd behavior
- Decreased self-esteem

Charter School also informs certificated employees about the groups of students determined by HCS and available research to be at elevated risk for bullying and provides its certificated employees with information on existing school and community resources related to the support of these groups. These groups include but are not limited to:

- Students who are lesbian, gay, bisexual, transgender, or questioning youth (“LGBTQ”) and those youth perceived as LGBTQ; and
- Students with physical or learning disabilities.

HCS encourages its employees to demonstrate effective problem-solving, anger management, and self-confidence skills for HCS’s students.

Grievance Procedures

Scope of Grievance Procedures

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

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

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

Submitting a Report or Complaint

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

Reports and complaints of misconduct prohibited by this Policy shall be submitted to the Coordinator (or the [INSERT TITLE] if the complaint is against the Coordinator) as soon as possible after the incidents giving rise to the report or complaint.

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]

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

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

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

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

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

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

Supportive Measures Under Title IX

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

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

Investigation and Response

Upon receipt of a report or complaint of misconduct prohibited by this Policy, the Coordinator or designee will promptly initiate an investigation. In most cases, a thorough investigation will take no more than thirty (30) school days.

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

If the complaint is against the Coordinator, the Executive Director or designee will conduct a fact-finding investigation and provide the complainant with information about the investigation and resolution of the incident/situation.

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

- Notice of the Allegations
 - Upon receipt of a formal complaint of sexual harassment, the Coordinator will give all known parties written notice of its grievance process, including any voluntary informal resolution process. The notice will include:
 - A description of the allegations of sexual harassment at issue and to the extent known, the identities of the parties involved in the incident, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident;
 - A statement that the respondent is presumed not responsible for the alleged conduct until a final decision is reached;
 - A statement that the parties may have an advisor of their choice, who may be an attorney, and may inspect and review evidence; and
 - A statement that HCS prohibits an individual from knowingly making false statements or knowingly submitting false information during the grievance process.

- Emergency Removal
 - HCS may place a non-student employee respondent on administrative leave during the pendency of a formal complaint of sexual harassment grievance process in accordance with HCS's policies.
 - HCS may remove a respondent from HCS's education program or activity on an emergency basis, in accordance with HCS's policies, provided that HCS undertakes an individualized safety and risk analysis, determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal, and provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.
 - This provision may not be construed to modify any rights under the IDEA, Section 504, or the ADA.
- Informal Resolution
 - If a formal complaint of sexual harassment is filed, HCS may offer a voluntary informal resolution process, such as mediation, to the parties at any time prior to reaching a determination regarding responsibility. If HCS offers such a process, it will do the following:
 - Provide the parties with advance written notice of:
 - The allegations;
 - The requirements of the voluntary informal resolution process including the circumstances under which the parties are precluded from resuming a formal complaint of sexual harassment arising from the same allegations;
 - The parties' right to withdraw from the voluntary informal resolution process and resume the grievance process at any time prior to agreeing to a resolution; and
 - Any consequences resulting from participating in the voluntary informal resolution process, including the records that will be maintained or could be shared; and
 - Obtain the parties' advance voluntary, written consent to the informal resolution process.
 - HCS will not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.
- Investigation Process
 - The decisionmaker will not be the same person(s) as the Coordinator or the investigator. HCS shall ensure that all decisionmakers and investigators do not have a conflict of interest or bias for or against complainants or respondents.
 - In most cases, a thorough investigation will take no more than thirty (30) school days. If the Coordinator determines that an investigation will take longer than thirty (30) school days and needs to be delayed or extended due to good cause, the Coordinator or designee will inform the complainant and any respondents in writing of the reasons for the delay or extension. The entire Title IX process, including informal resolution, opportunities to respond, and determination of responsibility may take ninety (90) calendar days or longer, depending on the complexity of the investigation and the issues raised.

- The parties will be provided with an equal opportunity to present witnesses, to inspect and review any evidence obtained that is directly related to the allegations raised, and to have an advisor present during any investigative meeting or interview.
- The parties will not be prohibited from discussing the allegations under investigation or to gather and present relevant evidence.
- A party whose participation is invited or expected at an investigative meeting or interview will receive written notice of the date, time, location, participants, and purpose of the meeting or interview with sufficient time for the party to prepare to participate.
- Prior to completion of the investigative report, HCS will send to each party and the party's advisor, if any, a copy of the evidence subject to inspection and review, and the parties will have at least ten (10) days to submit a written response for the investigator's consideration prior to the completion of the investigation report.
- The investigator will complete an investigation report that fairly summarizes relevant evidence and send a copy of the report to each party and the party's advisor, if any, at least ten (10) days prior to the determination of responsibility.
- Dismissal of a Formal Complaint of Sexual Harassment
 - If the alleged harassment did not occur in HCS's education program or activity, or against a person in the United States, or would not constitute sexual harassment under Title IX even if proved, the formal complaint with regard to that conduct must be dismissed for purposes of sexual harassment under Title IX. However, such a dismissal does not preclude action under another applicable HCS policy.
 - HCS may dismiss a formal complaint of sexual harassment if:
 - The complainant provides a written withdrawal of the complaint to the Coordinator;
 - The respondent is no longer employed or enrolled at HCS; or
 - The specific circumstances prevent HCS from gathering evidence sufficient to reach a decision on the formal complaint or the allegations therein.
 - If a formal complaint of sexual harassment or any of the claims therein are dismissed, HCS will promptly send written notice of the dismissal and the reason(s) for the dismissal simultaneously to the parties.
- Determination of Responsibility
 - The standard of evidence used to determine responsibility is the preponderance of the evidence standard.
 - Determinations will be based on an objective evaluation of all relevant evidence and credibility determinations will not be based on a person's status as a complainant, respondent, or witness.
 - HCS will send a written decision on the formal complaint to the complainant and respondent simultaneously that describes:
 - The allegations in the formal complaint of sexual harassment;
 - All procedural steps taken including any notifications to the parties, interviews with parties and witnesses, site visits, and methods used to gather other evidence;
 - The findings of facts supporting the determination;
 - The conclusions about the application of HCS's code of conduct to the facts;

- The decision and rationale for each allegation;
- Any disciplinary sanctions the recipient imposes on the respondent, and whether remedies designed to restore or preserve equal access to the education program or activity will be provided to the complainant; and
- The procedures and permissible bases for appeals.

Consequences

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

Right of Appeal

Should the reporting individual find HCS's resolution unsatisfactory for complaints within the scope of this Policy, other than formal complaints of sexual harassment, the reporting individual may, within five (5) business days of notice of HCS's decision or resolution, submit a written appeal to the President of the HCS Board, who will review the investigation and render a final decision.

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

- The complainant and the respondent shall have the same appeal rights and HCS will implement appeal procedures equally for both parties.
- Within five (5) business days of HCS's written decision or dismissal of the complaint, the complainant or respondent may submit a written appeal to the President of the Board, who will serve as the appeal decisionmaker or designate an appeal decisionmaker.
- The decisionmaker for the appeal will not be the same person(s) as the Coordinator, the investigator or the initial decisionmaker.
- The complainant and respondent may appeal from a determination regarding responsibility, and from HCS's dismissal of a formal complaint or any allegations therein, on the following bases:
 - Procedural irregularity that affected the outcome of the matter;
 - New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and
 - The Title IX Coordinator, investigator(s), or decisionmaker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.
- HCS will notify the other party in writing when an appeal is filed.
- The decisionmaker for the appeal will: 1) give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome; 2) issue a written decision describing the result of the appeal and the rationale for the result; and 3) provide the written decision simultaneously to both parties.

Recordkeeping

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]

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

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

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

Board Policy #: [INSERT]
Adopted/Ratified: [INSERT]
Revision Date: [INSERT]



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

Your Name: _____ Date: _____

Date of Alleged Incident(s): _____

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

List any witnesses that were present: _____

Where did the incident(s) occur? _____

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

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

Signature of Complainant

Date: _____

Print Name

To be completed by the Charter School:

Received by: _____ Date: _____

Follow up Meeting with Complainant held on: _____

4865-0092-2159, v. 4

Heartwood School Board Meeting Calendar

2025-26 School Year

6/24/2025

Dates and times subject to change

Special meetings may be scheduled as needed

Date	Time	Type	Location
Tuesday, August 5, 2025	9:30 AM	Special	Liberty Elementary School and videoconference
Thursday, September 4, 2025	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, September 30, 2025	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, October 21, 2025	9:30 AM	Special	Liberty Elementary School and videoconference
Tuesday, November 18, 2025	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, December 9, 2025	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, January 20, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, February 24, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, March 10, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, April 21, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, May 19, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference
Tuesday, June 16, 2026	6:30 PM	Special LCAP	Liberty Elementary School and videoconference
Tuesday, June 23, 2026	9:30 AM	Regular	Liberty Elementary School and videoconference