

REGULAR MEETING
February 2, 2026
5:00 p.m.

Item: Agenda - February 2, 2026



[X] Mailed [] Distributed at meeting

Location: Orange County Department of Education, Boardroom, 200 Kalmus Drive, Costa Mesa, CA 92626
YouTube Livestream: <https://www.youtube.com/live/6M1EgExBa1Y>

ORANGE COUNTY BOARD OF EDUCATION
AGENDA

WELCOME

CALL TO ORDER

STATEMENT OF PRESIDING OFFICER: For the benefit of the record, this Regular Meeting of the Orange County Board of Education is called to order.

ROLL CALL

(*) AGENDA

Regular Meeting of February 2, 2026 – Adoption

(*) MINUTES

Regular Meeting of January 7, 2026 – Approval

INVOCATION

5:00 p.m.

Rev. Ray Jordan, Senior Minister, Interim
Corona del Mar Community Church

PLEDGE OF ALLEGIANCE

INTRODUCTIONS

PUBLIC COMMENTS (General)

CONSENT CALENDAR

- (*) 1. Approve the granting of diplomas to the students listed from Alternative, Community, and Correctional Education Schools and Services, Alternative Education Division.
- (*) 2. Accept the 2nd Quarter Report on Williams Uniform Complaints for Orange County Department of Education ACCESS and Connections for the period of October 1 to December 31, 2025.
- (*) 3. Adopt resolution #02-26 to recognize March 2026 as Arts Education Month.

CHARTER SCHOOLS

- 4. Charter submissions

- (*) 5. Charter School Public Hearing – Samueli Academy Renewal Charter Petition
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.
Discussion Format:
Samueli Academy
Public Comments
Board Questions
- (*) 6. Board action on Samueli Academy renewal charter petition.
- (*) 7. Charter School Public Hearing – Ednovate-OC College Prep Material Revision
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.
Discussion Format:
Ednovate-OC College Prep
Public Comments
Board Questions
- (*) 8. Board action on Ednovate-OC College Prep material revision.
- (*) 9. Charter School Public Hearing – California Republic Leadership Academy
Orange County Material Revision
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.
Discussion Format:
California Republic Leadership Academy-OC
Public Comments
Board Questions
- (*) 10. Board action on California Republic Leadership Academy Orange County material revision.
- (*) 11. Charter School Public Hearing – Vista Condor Global Academy Renewal Charter Petition
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.
Discussion Format:
Vista Condor Global Academy
Public Comments
Board Questions
- (*) 12. Charter School Public Hearing – Suncoast Charter School Countywide Charter Petition
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.

Discussion Format:
Suncoast Charter School
Public Comments
Board Questions

- (*) 13. Charter School Public Hearing – Orange Springs Charter School Material Revision
Aracely Chastain, Executive Director, Charter Schools Unit, will facilitate the public hearing.
Discussion Format:
Orange Springs Charter School
Public Comments
Board Questions

PRESENTATIONS

14. School Site Safety Protocols (Valdes)
15. Anti-fraud Protocols – Childcare Reimbursements (Valdes)
16. Clarification of State School Tiers, Metrics, and Reauthorization Presumptions (Valdes)
- (*) 17. Presentation and adoption of the proclamation recognizing February 2026 as Career and Technical Education (CTE) Month.

BOARD RECOMMENDATIONS

- (*) 18. Adopt Resolution #03-26, Supporting Access to Bilingual Education. (Valdes)
- (*) 19. Adopt Resolution #04-26, Recognizing January 27, 2026, as International Holocaust Remembrance Day. (Shaw)
- (*) 20. Adopt Resolution #05-26, Supporting high-quality charter school petitions. (Barke and Shaw)

STAFF RECOMMENDATIONS

- (*) 21. Board action on Notice of Violation – Explore Academy

INFORMATION ITEMS

COMMUNICATION/INFORMATION/DISCUSSION

- (*) - Mid-Year Update of the 2025-26 OCDE/Connections Local Control and Accountability Plan
- (*) - Mid-Year Update of the 2025-26 CCPA Local Control and Accountability Plan
- (*) - Salary Increases over \$10,000 in accordance with Education Code 1302 and board policy 100-10
- Board Liaison

ANNOUNCEMENTS

- Superintendent
- Deputy Superintendent


LEGISLATIVE UPDATES

COMMITTEE REPORT

BOARD MEMBER COMMENTS

CLOSED SESSION(S) PUBLIC REPORT OUT

ADJOURNMENT



Renee Hendrick
Assistant Secretary, Board of Education

Next Regular Board Meeting - Wednesday, March 4, 2026, at 5:00 p.m.

Location - Orange County Department of Education, Boardroom, 200 Kalmus Drive, Costa Mesa, CA 92626
and via YouTube Livestream.

Individuals with disabilities requiring special accommodations, including agenda or agenda packet materials in alternative formats or auxiliary aids and services, may request assistance by contacting Darou Sisavath, Board Clerk, at (714) 966-4012.

(*) Printed items are included in materials mailed to Board Members.

ORANGE COUNTY BOARD OF EDUCATION
MINUTES

WELCOME

CALL TO ORDER

The Regular Meeting of the Orange County Board of Education was called to order by President Barke at 5:01 p.m., January 7, 2026, in the Board Room, 200 Kalmus Drive, Costa Mesa, CA 92626 and via YouTube live stream <https://www.youtube.com/live/B7e-5Vp1ihs>.

ROLL CALL

Present:
Lisa Sparks, Ph.D.
Jorge Valdes, Esq.
Mari Barke
Tim Shaw
Ken L. Williams, D.O.

AGENDA

Motion by Valdes, seconded by Shaw and carried by a vote of 5-0 to approve the agenda of the Regular meeting of January 7, 2026.

MINUTES

Motion by Williams, seconded by Sparks and carried by a vote of 5-0 to approve the minutes of the Regular meeting of December 3, 2025.

INVOCATION

Pastor Christina Williams
Harbor Light Church, Costa Mesa

PLEDGE OF ALLEGIANCE

Tim Shaw, Board Vice President

INTRODUCTIONS

None

PUBLIC COMMENTS (General)

- Allison
- Haoyu
- Katherine
- Javier
- Heidi
- Chris
- Ronna
- Brittania
- Laurie
- Michele

CONSENT CALENDAR

Motion by Sparks, seconded by Shaw and carried by a vote of 5-0 to approve Consent Calendar items #1, #2, and #3.

1. Approve the granting of diplomas to the students listed from Alternative, Community, and Correctional Education Schools and Services, Alternative Education Division.
2. Approve new Board Meeting dates for July 2026 through June 2027.
3. Receive the Orange County Department of Education's audit report from Nigro & Nigro for fiscal year ending June 30, 2025.
4. Motion by Shaw, seconded by Williams and carried by a vote of 5-0 to approve membership dues of \$7,557 for the Association of California County Boards of Education (ACCBE), effective January 1, 2026 – December 31, 2026.

CHARTER SCHOOLS

5. Charter submissions
 - Vista Condor Global Academy
 - Suncoast Charter
 - Tomorrow's Collaborative Leadership (TLC)

Note

Board Vice President Tim Shaw recused himself from discussion and participation regarding Item #6, Samueli Academy Renewal Charter Petition.

6. Charter School Public Hearing – Samueli Academy Renewal Charter Petition
Aracely Chastain, Executive Director, Charter Schools Unit, facilitated the public hearing.
 - Anthony Saba, Executive Director, Samueli Academy

PUBLIC COMMENTS (item #6)

- Kiara
 - Margie
 - Amy
 - Brandon
 - Diana
 - Owen
 - Martin
 - Isaac
 - Claudia
 - Cristina
 - Mark & Isela
7. Charter School Public Hearing – Ednovate-OC College Prep
Aracely Chastain, Executive Director, Charter Schools Unit, facilitated the public hearing.

- Katie Hart, Chief Operating Officer, Ednovate Charter Schools

PUBLIC COMMENTS (item #7)

- Isela
 - Genesis
 - Alex
8. Charter School Public Hearing – California Republic Leadership Academy
Orange County
Aracely Chastain, Executive Director, Charter Schools Unit, facilitated the public hearing.
- Gary Davis, Executive Director, CRLA

BOARD RECOMMENDATIONS

9. Motion by Williams, seconded by Sparks and carried by a vote of 5-0 to adopt Resolution #01-26 to recognize February 2026 as National Black History Month.

INFORMATION ITEMS

COMMUNICATION/INFORMATION/DISCUSSION

- Board Liaison Update – Brandon Guevara
 - Presented a semi-annual board liaison update focused on transparency and communication.
 - Reported launching social media and newsletters to improve public access and awareness.
 - Noted improved coordination and clearer structure for the liaison role.
 - Outlined next steps to expand outreach and use data to refine messaging and alignment.

ANNOUNCEMENTS

- Superintendent
 - Student Advocates for Mental Health program
 - Uses peer leadership to promote mental health awareness and suicide prevention.
 - Since 2020, it has trained nearly 6000 student leaders across 97 schools and reached over 153000 students, families, and staff.
 - Although current funding ends in June, leadership emphasized mental health remains a priority and efforts will continue to sustain the program.
- Deputy Superintendent
 - Next board meeting is on Monday, February 2, 2026; submission deadline is January 16; board packet delivery is January 28
 - Office closed: January 19, Martin Luther King Day
 - Charter School Oversight
 - Governor's Budget
 - Childcare Reimbursements

LEGISLATIVE UPDATE

- Trustee Shaw – Tax credit

BOARD MEMBER COMMENTS

- Trustee Valdes – Discussion of comments received regarding interest income, teacher starting salaries, and negotiations.
- Trustee Shaw – Acknowledged Dr. Sonje Berg and his accomplishments, including his 25 years in the Air Force.
- Trustee Barke – Attended the Sunburst Youth Academy graduation.

ADJOURNMENT

On a motion duly made and seconded, the January 7, 2026, board meeting adjourned at 7:33 p.m.



Renee Hendrick
Assistant Secretary, Board of Education

Mari Barke
President, Board of Education

Next Regular Board Meeting – Monday, February 2, 2026

Location - Orange County Department of Education, Boardroom, 200 Kalmus Drive, Costa Mesa, CA 92626
and via YouTube Livestream

Individuals with disabilities requiring special accommodations, including agenda or agenda packet materials in alternative formats or auxiliary aids and services, may request assistance by contacting Darou Sisavath, Board Clerk, at (714) 966-4012.

February 2, 2026

[X] Mailed [] Distributed at meeting

24

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026
TO: Renee Hendrick, Deputy Superintendent
FROM: Maria Martinez-Poulin, Ed.D., Chief of Alternative Education - ACCESS
SUBJECT: Granting of Diplomas

The students listed on the attached pages have been certified for graduation by the Custodian of Records or their designee for the Division of Alternative Education and the Division of Special Education Services of the Orange County Department of Education. These students have met the standards of proficiency in the basic skills prescribed by the governing board in accordance with Education Code 51412. It is requested that the Board approve the granting of diplomas to these students.

RECOMMENDATION:

Approve granting of diplomas to the students listed from Alternative, Community, and Correctional Education Schools and Services, Alternative Education Division and the Division of Special Education Services.

MMP

Pages 10-11 removed (CONFIDENTIAL STUDENT INFORMATION)

February 2, 2026

[X] Mailed [] Distributed at meeting

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent of Operations

FROM: Sandra Lee, Ed.D., Associate Superintendent

SUBJECT: Acceptance of 2nd Quarter Report on Williams Uniform Complaints for the Orange County Department of Education ACCESS and Connections

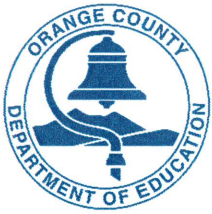
California Education Code section 35186(e) requires that school districts and county operated programs report summarized data on the nature and resolution of all Williams Uniform Complaints on a quarterly basis to the county superintendent of schools and the governing board of the school district.

The enclosed report indicates that no complaints were filed for ACCESS or Connections schools during the period of October 1 to December 31, 2025.

RECOMMENDATION:

Accept the 2nd Quarter Report on Williams Uniform Complaints for Orange County Department of Education ACCESS and Connections for the period of October 1 to December 31, 2025.

SL:ag



Stefan Bean, Ed.D.
County Superintendent of Schools

Orange County Department of Education
Educational Services Division

Williams Settlement Legislation
Second Quarter Report on Williams Uniform Complaints
October 1 – December 31, 2025

Education Code section 35186(e) requires that school districts and county operated programs report summarized data on the nature and resolution of all Williams Uniform Complaints on a quarterly basis to the County Superintendent of Schools and their governing board. This report includes the number of complaints filed, if any, by general subject area and identifies the number of resolved and unresolved complaints.

Orange County Department of Education ACCESS and Connections

ACCESS Schools

General Subject Area	Total # of Complaints	# Resolved	# Unresolved
Textbooks and Instructional Materials	0		
Teacher Vacancies or Misassignments	0		
Facility Conditions	0		
TOTALS	0		

Connections Schools

General Subject Area	Total # of Complaints	# Resolved	# Unresolved
Textbooks and Instructional Materials	0		
Teacher Vacancies or Misassignments	0		
Facility Conditions	0		
TOTALS	0		

February 2, 2026

☒ Mailed ☐ Distributed at meeting

et

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026
TO: Renee Hendrick, Deputy Superintendent
FROM: Darou Sisavath, Recording Clerk
SUBJECT: Resolution #02-26, Arts Education Month

RECOMMENDATION:

Adopt resolution #02-26 to recognize March 2026 as Arts Education Month.

**RESOLUTION OF THE BOARD OF EDUCATION
ORANGE COUNTY, CALIFORNIA**

**MARCH 2026
ARTS EDUCATION MONTH**

WHEREAS, Arts Education, which includes dance, music, theatre, and the visual arts, is an essential part of basic education for all students, kindergarten through grade twelve, to provide for balanced learning and to develop the full potential of their minds; and

WHEREAS, through well-planned instruction and activities in the arts, children develop initiative, creative ability, self-expression, self-reflection, thinking skills, discipline, a heightened appreciation of beauty and cross-cultural understanding; and

WHEREAS, experience in the arts develops insights and abilities central to the experience of life, and are collectively one of the most important repositories of culture; and

WHEREAS, many national and state professional educational associates hold celebrations in March focused on students' participation in the arts; and

WHEREAS, these celebrations give California schools a unique opportunity to focus on the value of the arts for all students, to foster cross-cultural understanding, to give recognition to the state's outstanding young artists, to focus on careers in the arts available to California students, and to enhance public support for this important part of our curriculum; and

WHEREAS, the California State Board of Education states in its Arts Education Policy adopted in July 1989 that each student should receive a high quality, comprehensive arts education program based on the adopted visual and performing arts curriculum documents.

NOW, THEREFORE, BE IT RESOLVED, on the 2nd day of February, 2026 that the Orange County Board of Education proclaims the month of March 2026 as the Arts Education Month and encourages all educational communities to celebrate the arts with meaningful student activities and programs that demonstrate learning and understanding in the visual and performing arts; and

BE IT FURTHER RESOLVED, that educational communities involve parents and community representatives in these activities and programs that demonstrate learning and understanding in the visual and performing arts and the Orange County Board of Education will distribute suitably prepared copies of this resolution to all school districts in the County of Orange.

AYES:

NOES:

ABSENT:

STATE OF CALIFORNIA, COUNTY OF ORANGE

I, Mari Barke, President of the Board of Education of Orange County, California hereby certify that the foregoing Resolution was duly and regularly adopted by the said Board at a regular meeting thereof held on the 2nd day of February 2026.

IN WITNESS THEREOF, I have hereunto set my hand and seal this 2nd day of February 2026.

Mari Barke, President
Orange County Board of Education

ORANGE COUNTY BOARD OF

BOARD AGENDA

Item: Charter Schools #5

February 2, 2026

☒ Mailed ☐ Distributed at meeting

RA

DATE: February 2, 2026
TO: Renee Hendrick, Deputy Superintendent
FROM: Aracely Chastain, Executive Director, Charter Schools Unit
SUBJECT: Public Hearing – Samueli Academy Charter Petition Renewal

DESCRIPTION:

On November 21, 2025, Samueli Academy submitted a renewal charter. The Orange County Board of Education held a public hearing on January 7, 2026, to consider the level of support for the charter school.

RECOMMENDATION:

Per California Education Code, on February 2, 2026, the Orange County Board of Education shall hold a public hearing to grant or deny the Samueli Academy renewal charter petition. At the public hearing, petitioners shall have equal time and opportunity to present evidence and testimony responsive to the Orange County Department of Education staff recommendations and findings published January 16, 2026.

**ORANGE COUNTY BOARD OF
EDUCATION
BOARD AGENDA**

Item: Charter Schools #6

February 2, 2026

☒ Mailed ☐ Distributed at meeting

RK

DATE: February 2, 2026
TO: Renee Hendrick, Deputy Superintendent
FROM: Aracely Chastain, Executive Director, Charter Schools Unit
SUBJECT: Board Action – Samueli Academy Charter School Renewal

DESCRIPTION:

On November 21, 2025, Samueli Academy submitted a renewal charter petition for a five-year charter term from July 1, 2026, through June 30, 2031. Orange County Board of Education held public hearings on January 7, 2026, and February 2, 2026.

The Orange County Board of Education has three options for action regarding a charter petition renewal:

- Option One: Approve the charter petition renewal for a five-year term from July 1, 2026, to June 30, 2031.
 - Option Two: Approve the charter petition renewal with conditions for a five-year term from July 1, 2026, to June 30, 2031. This action would result in the approval of the charter and require the execution of an Agreement to address the findings delineated in the staff report published on January 16, 2026, and establish appropriate timelines for the school to meet the conditions as specified.
 - Option Three: Deny the charter petition renewal.
-

RECOMMENDATION:

Orange County Department of Education staff recommend that the Orange County Board of Education approve with conditions the Samueli Academy charter petition renewal for a five-year term from July 1, 2026, through June 30, 2031.



MEMO

ORANGE COUNTY DEPARTMENT OF EDUCATION

January 16, 2026

To: Members, Orange County Board of Education
From: Orange County Department of Education Charter Schools Unit
Re: Staff Recommendations and Findings – Samueli Academy

I. INTRODUCTION

The purpose of this report is to summarize findings resulting from a comprehensive review of the renewal charter petition for Samueli Academy, conducted in accordance with Education Code sections 47607 and 47607.2, and to provide recommendations for consideration by the Orange County Board of Education (the Board).

II. BACKGROUND

Samueli Academy is a countywide charter school serving grades seven through twelve with a single location within the boundaries of the Garden Grove Unified School District in city of Santa Ana. The Board approved the Samueli Academy countywide charter petition for a five-year term from July 1, 2018, to June 30, 2023. Pursuant to statutory extensions codified in law, the current charter term was extended through June 30, 2026.

On November 21, 2025, Samueli Academy submitted a renewal charter petition. The Board held a public hearing on January 7, 2026, on the provision of the charter petition and to consider the level of support for the school by teachers employed by the school district, other employees of the school district, and parents.

III. LEGAL STANDARD

A chartering authority may grant one or more subsequent renewals to a charter school pursuant to Education Code sections 47607 and 47607.2. Charter renewals and material revisions of charters are governed by the standards and criteria described in Education Code section 47605, and shall include, but are not limited to, a reasonably comprehensive description of any new requirements of charter schools enacted into law after the charter was originally granted or last renewed.

In evaluating the renewal petition, the Board shall consider the school's fiscal and governance performance and whether the school is serving all pupils who wish to attend. The chartering authority shall consider the performance of the charter school on the state and local indicators

included in the California School Dashboard, giving greater weight to performance on measurements of academic performance. Additionally, the California Department of Education annually publishes a data file that provides the performance categories for all non-Dashboard Alternative School Status (non-DASS) charter schools for the purposes of charter renewal determinations.

IV. SUMMARY OF FINDINGS

Pursuant to Education Code sections 47607 and 47607.2, which establish a three-tiered performance framework for charter school renewal, Samueli Academy falls within the middle performance category and is therefore eligible for a five-year charter term. The findings summarized in this report identify areas requiring corrective action and may be addressed through an Agreement between the parties or alternatives, may serve as a basis for denial should the Board deny the renewal.

A. Teacher Credential Concerns

Education Code Section 47605(l)(1) requires that teachers employed by a charter schools hold the appropriate certificate, permit, or other credential issued by the Commission on Teacher Credentialing for the assignment they are teaching. Credential documentation must be maintained at the school site and is subject to periodic review by the chartering authority.

The California Statewide Assignment Accountability System (CALSAAS) is used to monitor assignment and credentialing compliance and identifies teachers who are not appropriately credentialed for their assigned positions. Teachers identified through CALSAAS are reported annually as “misassigned.” Since the implementation of CALSAAS in 2020, Samueli Academy has had a total of 24 teachers reported as misassigned, with some individuals appearing in multiple reporting years, as summarized below.

- 2020–21: 2 teachers
- 2021–22: 6 teachers
- 2022–23: 8 teachers
- 2023–24: 4 teachers
- 2024–25: 4 teachers

During the current charter term, Samueli Academy has received two notices of concern, and credentialing deficiencies have been cited in multiple annual oversight reports. At the time of this report, two credentialing issues remain unresolved. Staff continue to work collaboratively with the school to ensure that all certificated staff are appropriately credentialed for their assignments.

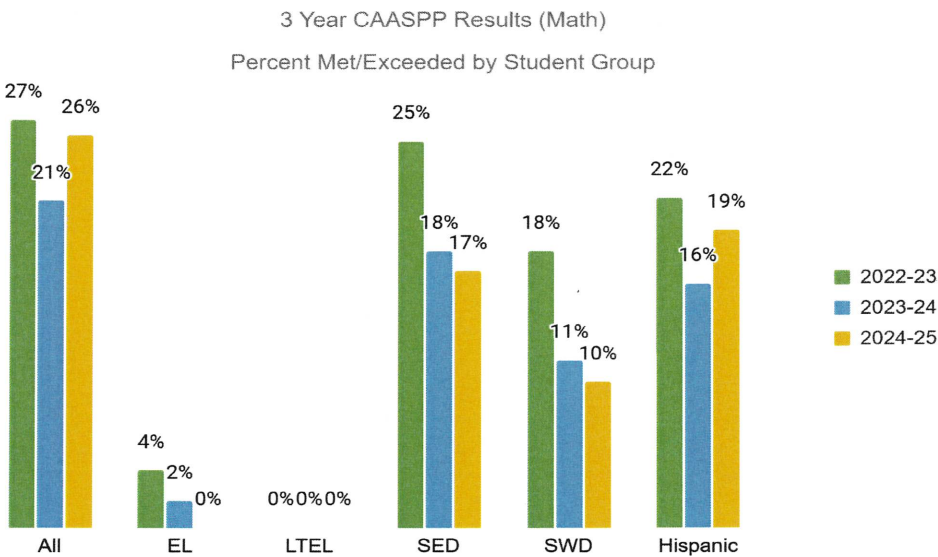
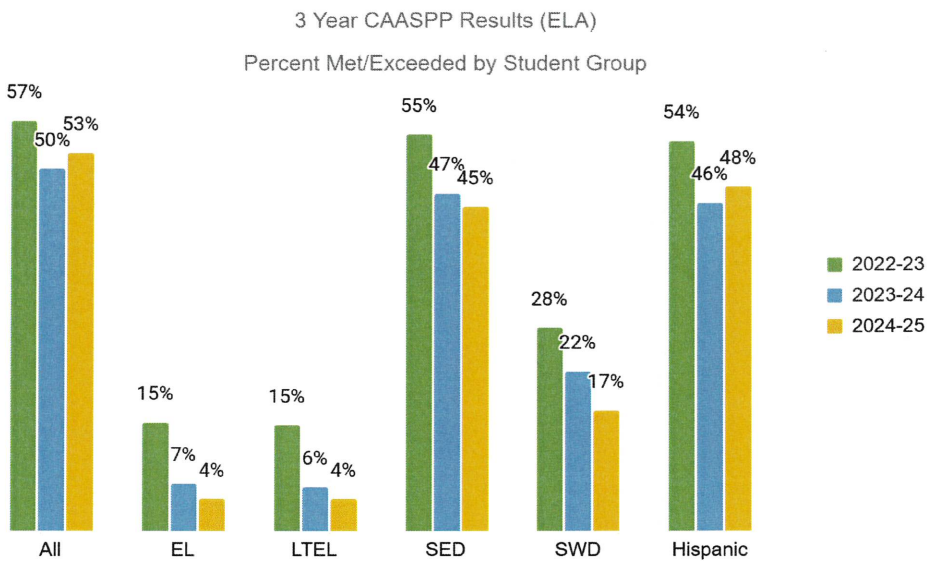
B. Measurable Pupil Outcomes

Student achievement data reflect both areas of improvement and areas requiring continued attention. Samueli Academy has demonstrated an upward trend in California School Dashboard

performance colors, suggesting that instructional strategies and academic supports are contributing positively to student learning and growth.

Over the past three years, Samueli Academy has outperformed the statewide average in CAASPP English Language Arts (ELA). However, during the same period, the percentage of English Learners (EL), Long-Term English Learners (LTEL), socioeconomically disadvantaged students (SED), and students with disabilities (SWD) meeting or exceeding standards has declined. Furthermore, CAASPP results continue to indicate persistent challenges in mathematics. Both the school overall and the identified student subgroups (EL, LTEL, SED, and SWD) have performed below the state average in mathematics and have experienced a decline in proficiency rates.

3 Year Performance Data



Current Year State Comparison

2024-25			2024-25		
CAASPP Comparison (ELA)			CAASPP Comparison (MATH)		
Student Group	(% Met/Exceeded)		Student Group	(% Met/Exceeded)	
	Samueli	State		Samueli	State
All	53%	49%	All	26%	37%
EL	4%	11%	EL	0%	11%
LTEL	4%	6%	LTEL	0%	3%
SED	45%	38%	SED	17%	27%
SWD	17%	17%	SWD	10%	13%
Hispanic	48%	39%	Hispanic	19%	26%

While the decrease in the percentage of students meeting or exceeding standards indicates that additional focus is necessary to support students in reaching proficiency, it does not negate the academic progress reflected in other performance indicators. Consistent with recommendations included in multiple oversight reports during the current charter term, the school should continue to analyze student achievement data and refine instructional strategies, with particular attention to EL, LTEL, SED, and SWD students, to accelerate growth and improve outcomes.

V. CONDITIONS OF APPROVAL

Should the Board approve the Samueli Academy countywide charter renewal, staff recommend that the following conditions be incorporated into the Agreement/MOU and completed within the timelines specified below:

A. Teacher Credential Concerns

By April 13, 2026, the school shall submit a detailed corrective action plan describing the procedures it will implement to ensure ongoing compliance with Education Code section 47605(l)(1). The plan shall address historical credentialing deficiencies and include processes for verifying credentials prior to employment, maintaining accurate credential records, and regularly monitoring CALSAAS reports to resolve any identified misassignments within 30 days of notification.

B. Measurable Pupil Outcomes

By April 13, 2026, the school shall submit a comprehensive academic growth plan addressing declining schoolwide proficiency rates and persistent weaknesses in mathematics. The plan shall include a specific focus on EL, LTEL, SED, and SWD subgroups and incorporate measurable

goals, defined timelines, and targeted strategies informed by ongoing analysis of student achievement data.

VI. STAFF RECOMMENDATION

Orange County Department of Education staff recommend that the Board approve the Samueli Academy charter renewal petition with conditions for a five-year term from July 1, 2026, through June 30, 2031. Approval of the renewal would require execution of an Agreement no later than the Board's regularly scheduled meeting in May 2026 to define the operational relationship between the parties, address the findings identified in this Staff Report, and establish timelines for completion of the required conditions. These conditions are intended to remedy identified deficiencies in teacher credentialing compliance and student achievement outcomes, ensure alignment with applicable Education Code requirements, and support improved academic performance for all student subgroups.

VII. CONCLUSION

The Orange County Board of Education has three options for action regarding a charter petition renewal:

- Option One: Approve the charter petition for a period of five years from July 1, 2026, to June 30, 2031.
- Option Two: Approve the charter petition with conditions for a period of five years from July 1, 2026, to June 30, 2031. This action would result in approval of the charter and require the charter school to address the issues outlined in this Staff Report and identified by the Board by established timelines.
- Option Three: Deny the charter petition.

* * *

**AGREEMENT BETWEEN
ORANGE COUNTY BOARD OF EDUCATION
AND SAMUELI ACADEMY
FOR THE OPERATION OF SAMUEL ACADEMY**

DRAFT

This Agreement is made and entered into this 2nd day of February 2026, by and between the Orange County Board of Education (“Board”) and Samueli Academy, a nonprofit public benefit corporation operating Samueli Academy (hereinafter collectively referred to as “Charter School”). Hereinafter, the Board and Charter School shall be collectively referred to as “the Parties,” and the Board-designated staff of the Orange County Superintendent of Schools (“County Superintendent”) shall be referred to as “OCDE.”

I. INTRODUCTORY PROVISIONS

- A. The Board approved the Charter School’s petition for a five-year period from July 1, 2026, through June 30, 2031.
- B. Charter School will be operated by a nonprofit public benefit corporation, formed and organized pursuant to the Nonprofit Public Benefit Corporation Law (Corp. Code section 5110 et seq.). Samueli Academy is the California nonprofit public benefit corporation operating the Charter School. Charter School shall ensure that at all times throughout the term of its charter, the terms and conditions of any agreement between Charter School and a third party, as well as the Articles of Incorporation and Bylaws of Samueli Academy as they pertain to Charter School are and remain consistent with the Charter Schools Act, all applicable laws and regulations, provisions of the charter, and this Agreement. Charter School will notify OCDE of any amendments or modifications to the nonprofit public benefit corporation’s articles of incorporation within **ten (10) business days** of the change. Amendments or modifications to the bylaws may require approval by the Board as a material revision to the petition.
- C. The purpose of this Agreement is to set forth the responsibilities of the Parties with respect to the operational relationship between Charter School, the Board, and OCDE; to address those matters that require clarification; and to outline the Parties’ agreements governing their respective fiscal and administrative responsibilities and their legal relationships. To the extent this Agreement contains terms inconsistent with the terms of the charter approved on February 2, 2026, the terms of this Agreement shall control.

II. TERM OF AGREEMENT

- A. This Agreement is effective from the date upon which it is approved by the governing boards of each Party for the term of the charter, shall be reviewed at least annually, and may be amended at any time with written mutual agreement of the Parties.
- B. The approved Agreement continues in existence until Charter School voluntarily closes or its charter is non-renewed or revoked, and closure procedures are completed, as determined by the Board and Charter School, after which the Agreement automatically expires. This Agreement is subject to termination during the charter term or during any subsequent renewal as specified by law or as otherwise set forth in this Agreement.

- C. Charter School may seek renewal of its charter by submitting a renewal request to the Board prior to the expiration of the term of the charter, and the Board will evaluate and decide on the renewal request in accordance with Education Code sections 47607, 47607.2, and 47605, and their implementing regulations. Charter School will submit its renewal petition for the new charter term to OCDE no sooner than **September 1** and no later than **March 1** of the final school year for which Charter School is authorized to operate.

III. FULFILLING CHARTER TERMS

A. Governance

1. Charter School acknowledges and agrees it shall comply with the Public Records Act, the Political Reform Act, the Ralph M. Brown Act, Government Code section 1090 et seq. as set forth in Education Code section 47604.1, and all applicable laws and regulations as they may be amended or added during the term of the charter, including all conflict of interest laws, federal and state nondiscrimination laws, and prohibitions against unauthorized student fees.
2. Charter School, the Board and OCDE are separate legal entities. OCDE is not the chartering authority and shall not be liable for the debts or obligations of the Charter School or for claims arising from the performance of acts, errors, or omissions by Charter School. The Board, as the chartering authority, shall not be liable for the debts or obligations of the charter school or for claims arising from the performance of acts, errors, or omissions by the charter school in accordance with Education Code section 47604(d).
3. Within **ten (10) business days** of Charter School board meetings, including special and emergency board meetings, Charter School shall provide OCDE with a complete audio recording of the meeting and all materials provided to the governing board by its administration, contractors, or the public including approved previous meeting minutes, except for confidential communications as defined in Evidence Code section 952 and Government Code section 54963. Charter School will update OCDE of any changes to the Charter School board calendar within **ten (10) business days**.
4. Charter School will provide Brown Act and conflict of interest training to its governing board members and administrative staff within **45 days** of taking office or becoming employed, or as otherwise agreed with OCDE, and **at least once every year**. Charter School will certify that the trainings have been provided to the specified individuals.

B. Educational Program

1. Independent Study: Any independent study program operated by Charter School shall comply with all applicable laws and regulations regarding independent study.
2. Family Educational Rights and Privacy Act ("FERPA"): Charter School, its officers and employees will comply with FERPA and the California Education Code sections related to student information protection at all times. Charter School will authorize OCDE to access educational records maintained by Charter School, in accordance with FERPA, and provide notice of such in Charter School policies and Parent/Student Handbook.
3. Sound Educational Program: Charter School shall maintain courses of study, curriculum and

teaching methods fully compliant with state and federal law. Such compliance includes, but is not limited to, requiring adherence to all applicable anti-discrimination laws, including, but not limited to, Title VI of the Civil Right Act of 1964, and preventing or rescinding federal funding for LEAs which support gender ideology or discriminatory equity ideology (“DEI”) in K-12 curriculum, instruction, programs or activities. Children attending Charter School shall not: (1) be compelled to adopt identities as either victims or oppressors solely based on their skin color and other immutable characteristics; (2) be made to question whether they were born in the wrong body and whether to view their parents and their reality as enemies to be blamed; (3) be imprinted with anti-American, subversive, harmful and false ideologies such as, but not limited to, Critical Race Theory; and, (4) be assisted, encouraged or facilitated in any gender transition plan without parental consent. Charter School shall review and approve all individual teacher curriculum class materials provided to students before such materials are distributed.

C. Fiscal Operations

1. Charter School will be directly funded in accordance with Chapter 6 (commencing with Section 47630) of Division 4 of Title 2 of the Education Code. The Parties recognize the authority of Charter School to pursue additional sources of funding.
2. The Parties agree that OCDE is not responsible to provide funding in lieu of property taxes to Charter School.
3. Charter School shall comply with Generally Accepted Accounting Principles (“GAAP”) applicable to public school finance and fiscal management.
4. Charter School shall adopt accounting policies and practices that establish separate accounts and/or sub-accounts for each affiliated charter school. The expenses attributable to each charter school shall be paid only from the account or sub-account of that charter school. Invoices, purchase orders, and other appropriate documentation shall be maintained by Charter School and shall be deemed to be public records subject to disclosure to OCDE upon request.
 - a) Each year Charter School shall make all records relating to the expenses of all affiliated charter schools available to OCDE and Charter School’s auditor for review and audit to ensure that all expenses are appropriately allocated. In addition, Charter School shall promptly respond as required by Education Code section 47604.3.
 - b) Each year Charter School shall provide an updated organizational chart of all affiliated charter schools and all related parties operated or otherwise controlled by the same nonprofit public benefit corporation.
 - c) Charter School may temporarily loan funds between schools that it operates pursuant to a resolution approved by its Board of Directors that specifies the duration and interest rate of the loan and understands and agrees to provide access to records of Charter School and its affiliated charter schools, upon request from OCDE in accordance with Education Code section 47604.3.
5. Charter School shall establish a fiscal plan for repayment of any loans received by and/or on

behalf of Charter School. It is agreed that OCDE shall receive written notice of all loans received by the Charter School, and repayment of loans shall be the sole responsibility of Charter School.

6. Charter School will use all revenue received from the state and federal sources only for the educational services specified in the charter and this Agreement for the students enrolled and attending Charter School. Other sources of funding must be used in accordance with applicable state and federal statutes and the terms or conditions, if any, of any grant or donation.

D. Fiscal Agent

1. The Parties agree that neither the Board nor OCDE shall act as fiscal agent for Charter School. It is agreed that Charter School shall be solely responsible for all fiscal services such as payroll, purchasing, attendance reporting, and completion and submission of state budget forms but may contract with OCDE for such services by way of a separate written contract.
2. Charter School is responsible for establishing the appropriate funds or accounts in the Orange County Treasury for Charter School and for making the necessary arrangements for Charter School's participation in the State Teachers' Retirement System ("CalSTRS"), the Public Employees' Retirement System ("CalPERS"), or social security. Nothing in this paragraph shall be interpreted to mean that Charter School must maintain all funds in the County Treasury. If funds are not maintained in the County Treasury, they must be deposited with a federally insured commercial bank or credit union.
 - a) OCDE will only withdraw funds from the Orange County Treasury to a charter school-owned bank account. Bank account name must match the charter school name or a Doing Business As ("DBA") reference. No fund transfers will be made to a third party.
 - b) Orange County Treasury withdrawals will take place two (2) times per month. The first withdrawal will take place on the 10th day of each month, and the second withdrawal will take place at the end of each month.
 - c) Charter School's Orange County Treasury account will maintain a minimum balance that is sufficient to cover one (1) month of CalSTRS and CalPERS retirement contributions.

E. Student Attendance Accounting and Reporting

Charter School shall utilize commercially available attendance accounting software.

F. Oversight Fees

1. Charter School will be charged an annual oversight fee not to exceed one percent (1%) of the revenue received by Charter School in accordance with Education Code section 47613. The oversight fee will be calculated on the LCFF base grant, supplemental grant and concentration grant funding provided at the First Principal Apportionment (P-1). The amount will be calculated in **April of each year** based upon first principal apportionment (P-1) data for ninety-five percent (95%) of the estimated total. The calculation will also include an adjustment for the preceding year based upon final revenue for that year.
2. Payment Schedule: Charter School shall pay to County Superintendent its actual oversight

costs not to exceed one percent (1%) of the LCFF base grant, supplemental grant, and concentration grant revenue received by Charter School ("Oversight Fee") in two (2) equal payments during each Fiscal Year: (1) First Payment -- fifty percent (50%) of the Oversight Fee will be paid on or about **January 15**; and (2) Second Payment -- the remaining fifty percent (50%) plus any adjustment necessary to the First Payment, will be paid on or about **June 15**. County Superintendent will bill Charter School for the Oversight Fee that is due, and Charter School shall make payment within thirty (30) days from the date of receipt of the bill, or thirty-two (32) days from the date of the bill. If County Superintendent does not receive the payment within the above-specified timeframe, Charter School hereby authorizes County Superintendent to transfer the payment from Charter School account to County Superintendent's account upon expiration of the thirty (30) days from the receipt of the bill or thirty-two (32) days from the date of the bill.

G. Insurance and Liability

1. Charter School will provide certificates of insurance coverage to OCDE prior to opening and annually thereafter. The certificates shall indicate that the Board, County Superintendent, and OCDE are endorsed as additional insured under the coverage and shall include a provision that the coverage will be primary and will not participate with any valid and collectible insurance or program of self-insurance carried or maintained by the Board, County Superintendent or OCDE. Exhibit A, Insurance Coverage and Policies indicates the minimum insurance requirements and is incorporated by reference herein. Charter School shall forward any written notice to OCDE within **three (3) business days** of any modification, change or cancellation of any of the above insurance coverage. It shall be expressly understood that the coverage and limits referenced herein shall not in any way limit the liability of Charter School. In addition, Charter School shall assure that its vendors have adequate insurance coverage for the goods and/or services provided to Charter School to protect the interests of Charter School as well as OCDE, the Board and the County Superintendent.
2. Charter School shall hold harmless, defend, and indemnify the Board, the County Superintendent, and OCDE, its officers, agents, and employees from every liability, claim, or demand (including settlement costs and reasonable attorneys' fees) which may be made by reason of: (1) any injury to volunteers; and (2) any injury to person or property sustained by any person, firm or Charter School related to any act, neglect, default or omission of Charter School, its officers, employees or agents, including any claims for any contractual liability resulting from third party contracts with Charter School's vendors, contractors, partners or sponsors. In cases of such liabilities, claims or demands, Charter School, at its own expense and risk, shall defend all legal proceedings which may be brought against it and/or the Board, the County Superintendent or OCDE, its officers and employees, and satisfy any resulting judgments up to the required Agreements that may be rendered against any of them. Notwithstanding the foregoing: (a) any settlement requiring the Board, the County Superintendent or OCDE to admit liability or to pay any money will require the prior written consent of the Board, the County Superintendent or OCDE, as applicable; and (b) the Board, County Superintendent and/or OCDE may join in the defense with its counsel at its own expense.

3. Charter School understands and agrees that its employees, contractors, subcontractors and agents shall not be considered officers, employees or agents of the Board, the County Superintendent or OCDE, and are not entitled to benefits of any kind or nature normally provided to OCDE employees. Charter School further assumes the full responsibility for acts and/or omissions of its employees, agents or contractors as they relate to the services to be provided under the charter and this Agreement. Charter School shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance (as applicable), social security and income tax withholding with respect to employees of Charter School.
4. Required Disclosures: Charter School shall notify OCDE in writing within **three (3) business days** of any pending or actual litigation and/or formal claim from any party or notice of potential criminal infraction, criminal or civil action against Charter School or any employee, or request for information by any governmental agency to the extent permitted by law. Charter School acknowledges and agrees it shall comply with all applicable laws and regulations as may be amended or added during the term of the charter.

H. Human Resources

CalSTRS and CalPERS Reporting Requirements: Charter School shall accept and assume sole financial responsibility for any and all CalSTRS and CalPERS reporting fines and penalties, including any and all financial consequences from the implementation of regulations, or any other action, that renders employees of Charter School ineligible to participate in a governmental defined-benefit retirement plan.

I. Contracts

1. Charter School shall not have the authority to enter into a contract that would bind the Board, County Superintendent and/or OCDE, nor to extend the credit of the Board, County Superintendent and/or OCDE to any third person or Party. Charter School shall clearly indicate in writing to vendors and other entities with which or with whom Charter School enters into an agreement or contract that the obligations of Charter School under such agreement or contract are solely the responsibility of Charter School and are not the responsibility of the Board, County Superintendent and/or OCDE.
2. Charter School shall ensure that all contracts for goods and services comply with the criteria noted in Title 5, section 11967.5.1 of the California Code of Regulations. Charter School shall comply with bidding requirements tied to receipt of any state, federal or grant funds that require compliance with bidding that is more stringent or purchasing requirements. Additionally, records and information regarding implementation of the contract will be provided to OCDE in accordance with Education Code section 47604.3.
3. Charter School will make every effort to ensure that vendors comply with all reasonable inquiries by OCDE for records and information related to this contract.
4. Charter/Education Management Organization (C/EMO) Contracts:

Entering into or substantively revising a contract with an Educational Charter Management Organization (E/CMO) shall be presented to the Board for approval as a material revision to

the charter.

Charter School shall ensure the following for any C/EMO contract:

- a) Require that any C/EMO contract (or revision to an agreement) that is entered into be in compliance with state and federal law and the charter and includes language that:
 - i. None of the principals of either the C/EMO or Charter School has conflicts of interest.
 - ii. C/EMO shall comply with Education Code section 47604.3 and the California Public Records Act, Government Code section 6250 et. seq.
 - iii. Any provision of the agreement that is in violation of state or federal law or the charter is void.
- b) Upon approval by Charter School board, Charter School shall provide OCDE a copy of the following:
 - i. C/EMO agreement (or revision to an agreement).
 - ii. Evidence that the C/EMO is a nonprofit public benefit corporation.
 - iii. A description of the C/EMO's roles and responsibilities for the management of Charter School and the internal controls that will be put in place to guide the relationship.
 - iv. A list of other schools managed by the C/EMO.
 - v. A list of and background on the C/EMO's leaders and board of directors.

J. Facilities Agreement

1. Prior to opening, Charter School will provide a written signed agreement, lease or other similar document indicating Charter School's right to use the principal school site identified in the charter, and any ancillary facilities identified by Charter School, for that school year unless Charter School has previously provided a long-term lease that includes the school year at issue, and evidence that the facility will be adequate for Charter School's needs.
2. A pre-opening site visit shall be conducted by OCDE prior to the opening of Charter School. Once open, Charter School must request a material revision to the charter petition in order to change facilities. Following an approved revision to the charter, OCDE will conduct, without unreasonable delay, a site visit of a new or changed Charter School facility prior to students attending the new facilities. Under extraordinary circumstances (e.g., a change of facilities necessitated by fire, natural disaster or inhabitability), the Parties may waive the pre-opening site visit.

K. Zoning and Occupancy

1. Charter School shall provide OCDE with a Certificate of Occupancy issued by the applicable permitting agency, allowing Charter School to use and occupy the site prior to opening, unless Charter School is located at a public school site provided pursuant to Proposition 39 or other

facilities use agreement with a school district. In lieu of the zoning certification, Charter School can provide OCDE with evidence that zoning ordinances have been overridden by the school district in which the facility is located or by another entity authorized to override zoning ordinances pursuant to current or then applicable state law. The facility must meet all applicable health and fire code requirements, zoning laws, and Americans with Disabilities Act (“ADA”) requirements for a K-12 public school.

2. If Charter School moves or expands to another facility during the term of this charter, Charter School shall provide a Certificate of Occupancy to OCDE for each facility before the school is scheduled to open or operate in the facility or facilities. If Charter School ever seeks facilities from a school district in which it intends to locate (or is located) under Education Code section 47614 (Proposition 39), it will follow applicable statutes and regulations regarding submission of such a request to the school district.
3. Notwithstanding any language to the contrary in this charter, the interpretation, application and enforcement of this provision are not subject to the Dispute Resolution Process outlined in the charter. The Parties agree that should a dispute arise under this section, they will meet to attempt to resolve any concerns within ten (10) calendar days of the dispute.

L. Dispute Resolution

The Parties acknowledge and agree that in addition to the provisions of the charter, dispute resolution procedures shall be consistent with applicable laws and regulations, including Education Code section 47607(g). The staff and governing board members of Charter School agree to resolve any claim, controversy or dispute arising out of or relating to the Charter agreement between OCDE and Charter School, except any controversy or claim that is in any way related to revocation of this Charter School, pursuant to the terms of the dispute resolution procedures in the charter.

IV. MATERIAL REVISIONS

Modifications of the approved charter must be in writing and submitted to OCDE for review and determination as to whether such amendments must be submitted to the Board as a material revision to the charter. Such amendments may only be submitted to the Board upon the approval of Charter School’s board and will take effect only if approved by the Board.

V. SEVERABILITY

If any provision or any part of this Agreement is for any reason held to be invalid and/or unenforceable or contrary to public policy or statute, the remainder of this Agreement shall not be affected thereby and shall remain valid and fully enforceable.

VI. NON-ASSIGNMENT

No portion of this Agreement or the Charter petition approved by the Board may be assigned to another entity without the prior written approval of the Board.

VII. WAIVER

A waiver of any provision or term of this Agreement must be in writing and signed by both Parties. Any such waiver shall not constitute a waiver of any other provision of this Agreement. All Parties

agree that neither Party to this Agreement waives any of the rights, responsibilities and privileges established by the Charter Schools Act of 1992.

VIII. NONDISCRIMINATION

The Parties recognize and agree that in addition to complying with all nondiscrimination requirements of the Charter Schools Act, including agreement that Charter School shall not charge tuition, shall be nonsectarian, and pursuant to Education Code section 200 et seq., Charter School shall be open to all students. In addition to these nondiscrimination provisions, Charter School shall not discriminate against applicants or employees on the basis of any characteristics or categories protected by state or federal law. Charter School acknowledges and agrees that it shall comply with all applicable federal and state nondiscrimination laws and regulations as they may be amended.

IX. COMPLAINT PROCEDURES

Charter School shall adopt Uniform Complaint Procedures in accordance with California law. Furthermore, Charter school shall adopt and maintain policies and procedures to address parent and student concerns and/or complaints. Uniform Complaint Procedures and parent/student complaint procedures shall be communicated to parents and students annually in a format to be determined by Charter School.

X. NOTIFICATION

All notices, requests and other communications under this Agreement shall be in writing and mailed to the proper addresses as follows:

To OCDE at:

Renee Hendrick, Deputy
Superintendent Orange County
Department of Education
200 Kalmus Drive
Costa Mesa, CA 92626-5922

To Samueli Academy at:

Anthoy Saba, Executive Director
Samueli Academy
1901 N. Fairview St.
Santa Ana, CA 92706

XI. INTEGRATION

This Agreement contains the entire Agreement of the Parties with respect to the matters covered hereby, and supersedes any oral or written understandings or agreements between the Parties with respect to the subject matter of this Agreement. No person or Party is authorized to make any representations or warranties except as set forth herein, and no Agreement, statement, representation or promise by any party hereto which is not contained herein shall be valid or binding. The undersigned acknowledges that she/he has not relied upon any warranties, representations,

statements or promises by any of the Parties herein or any of their agents or consultants except as may be expressly set forth in this Agreement. The Parties further recognize that this Agreement shall only be modified in writing by the mutual agreement of the Parties.

XII. ORDER OF PRECEDENCE

The Parties further acknowledge and agree that, unless otherwise noted in this Agreement, any inconsistency in the charter shall be resolved by giving precedence in the following order:

1. This Agreement
2. Documents incorporated by reference to the Agreement, including Exhibit A
3. The Charter, as approved by the Board
4. The bylaws and articles of incorporation of the nonprofit public benefit corporation operating as the Charter School

For Charter School:

For the Board:

Date: _____

Date: _____

Name: _____

Name: _____

Title: _____

Title: _____

Signature: _____

Signature: _____

EXHIBIT A
INSURANCE COVERAGE AND POLICIES

Charter School, at its sole cost and throughout the charter term, shall procure and maintain in effect each insurance listed below. All required insurance, and if self-insurance will be provided, must contain coverage that complies, at a minimum, with the following requirements:

1. Property Insurance for replacement value, if offered by the insurance carrier, including coverage for all assets listed in Charter School's property inventory and consumables. If full replacement value coverage is unavailable, Charter School shall procure property insurance in amounts as close to replacement value as possible and sufficient to protect the school's interests.
2. General Commercial Liability with at least \$2,000,000 per occurrence and \$5,000,000 in total general liability insurance, providing coverage for negligence, errors and omissions/educators legal liability, and fire legal liability of Charter School, its governing board, officers, agents, employees, and/or students. The deductible per occurrence for said insurance shall not exceed \$20,000 for any and all losses resulting from negligence, errors and omissions of Charter School, its governing board, officers, agents, employees, and/or students.
3. Workers' Compensation insurance in accordance with the California Labor Code, adequate to protect Charter School from claims under workers' compensation acts, which may arise from Charter School's operation, with statutory limits. The workers' compensation insurance coverage must also include employer's liability coverage with limits of \$1,000,000/\$1,000,000/\$1,000,000.
4. Commercial Auto Liability, including owned, leased, hired, and non-owned coverage with limits of \$1,000,000 combined single limit per occurrence if Charter School does not operate a student bus service. If Charter School provides student bus services, the required coverage limit is \$5,000,000 combined single limit per occurrence.
5. Crime Insurance or Fidelity Bond coverage to cover all Charter School employees who handle, process, or otherwise have responsibility for Charter School's funds, supplies, equipment or other assets. Minimum amount of coverage shall be \$1,000,000 per occurrence, with no self-insured retention.
6. Professional Educators Errors and Omissions liability coverage with minimum limits of \$3,000,000 per occurrence and \$3,000,000 general aggregate.
7. Sexual Molestation and Abuse coverage with minimum limits of \$3,000,000 per occurrence. Coverage may be held as a separate policy or included by endorsement in the Commercial General Liability or the Errors and Omissions Policy.
8. Employment Practices Legal Liability coverage with limits of \$3,000,000 per occurrence and \$3,000,000 general aggregate.
9. Excess/umbrella insurance with limits of not less than \$10,000,000 is required of all high schools and any other school that participates in competitive interscholastic or intramural sports programs.

EXHIBIT B
CHARTER-SPECIFIC CONDITIONS

1. Teacher Credential Concerns

By **April 13, 2026**, the school shall submit a school board approved detailed corrective action plan describing the procedures it will implement to ensure ongoing compliance with Education Code section 47605(l)(1). The plan shall address historical credentialing deficiencies and include processes for verifying credentials prior to employment, maintaining accurate credential records, and regularly monitoring CALSAAS reports to resolve any identified misassignments within 30 days of notification.

2. Measurable Pupil Outcomes

By **April 13, 2026**, the school shall submit a comprehensive academic growth plan addressing declining schoolwide proficiency rates and persistent weaknesses in mathematics. The plan shall include a specific focus on EL, LTEL, SED, and SWD subgroups and incorporate measurable goals, defined timelines, and targeted strategies informed by ongoing analysis of student achievement data. Demonstrate average annual grade-equivalency growth of at least 1.5-2.0 years of progress per cohort, enabling students to accelerate toward grade-level proficiency.

**RESOLUTION AND WRITTEN FINDINGS
OF THE ORANGE COUNTY BOARD OF EDUCATION
TO APPROVE THE RENEWAL OF
SAMUELI ACADEMY**

WHEREAS, the Legislature enacted the Charter Schools Act of 1992, Education Code section 47600 et seq.;

WHEREAS, Education Code section 47607(a)(2) states that a chartering authority may grant one or more subsequent renewals pursuant to Education Code sections 47607 and 47607.2;

WHEREAS, Education Code section 47607(b) requires that renewals shall be governed by the same standards and criteria that apply to new charter petitions as set forth in Education Code section 47605. However, a charter renewal shall not be denied based on the fiscal impact of the charter school on the district or a finding that the charter school is unlikely to serve the interests of the entire community in which the charter school is located;

WHEREAS, in determining whether to grant a charter renewal, a chartering authority shall review both schoolwide performance and the performance of numerically significant student subgroups on the state and local indicators included in the California School Dashboard, giving greater weight to performance on measurements of academic performance. If the Dashboard indicators are not yet available for the most recently completed academic year before renewal, a chartering authority shall consider verifiable data provided by the charter school related to the Dashboard indicators, such as data from the California Assessment of Student Performance and Progress, or any successor system, for the most recent academic year;

WHEREAS, following the review, a renewal of the charter petition may be granted in accordance with a three-tiered system based on the charter school's performance pursuant to Education Code section 47607(c) for high performing charter schools, Education Code section 47607.2(b) for middle performing charter schools and Education Code section 47607.2(a) for low performing charter schools;

WHEREAS, a chartering authority may deny renewal of a charter upon a finding that the school is demonstrably unlikely to successfully implement the program set forth in the petition due to substantial fiscal or governance factors or a finding that the school is

not serving all students who wish to attend. When denying a charter renewal for either of these reasons, a chartering authority shall provide the charter school at least 30 days' notice of the alleged violation and a reasonable opportunity to cure the violation, including the submission of a proposed corrective action plan. The renewal shall be denied if a chartering authority finds either the corrective action proposed by the charter school has been unsuccessful or the violations are sufficiently severe and pervasive as to render a corrective action plan unviable. Any finding that a school is not serving all students who wish to attend shall specifically identify the evidence supporting the finding;

WHEREAS, in determining whether to grant a charter renewal for a charter school eligible for the state's Dashboard Alternative School Status, a chartering authority shall consider, in addition to the charter school's performance on the state and local indicators included in the Dashboard, the charter school's performance on alternative metrics applicable to the charter school based on the student population served. The chartering authority may deny a charter renewal only upon making written findings, setting forth specific facts to support the findings that the closure of the charter school is in the best interest of students;

WHEREAS, on November 21, 2025, the Orange County Board of Education ("Board") received a petition from Samueli Academy, a California nonprofit public benefit corporation, for the renewal of Samueli Academy;

WHEREAS, on January 7, 2026, the Board held a public hearing on the charter renewal and received public comment thereon;

WHEREAS, on January 18, 2026, the Board published a Staff report, with recommended findings, prepared by staff members of the Orange County Department of Education ("OCDE");

WHEREAS, on February 2, 2026, the Board at its regular meeting held a public hearing, at which, the Petitioners had equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings, to grant or deny the renewal petition;

NOW, THEREFORE, BE IT RESOLVED that the Board reviewed and considered the renewal Petition and related information received with respect to the renewal Petition, including information presented at the public hearings and in the Staff Report in accordance with Education Code sections 47607;

BE IT FUTHER RESOLVED that the Board hereby approves the renewal petition for a charter school submitted by Samueli Academy, a California nonprofit public benefit corporation, for the operation of Samueli Academy for a period of five years, beginning on July 1, 2026 and expiring June 30, 2031;

BE IT FURTHER RESOLVED that Samueli Academy will enter into an Agreement that addresses the operational relationship between the School, the Board and OCDE no later than the Board's regularly scheduled meeting in April 2026.

STATE OF CALIFORNIA)
COUNTY OF ORANGE)
_____)

I, Jorge Valdez, Esq., Clerk of the Orange County Board of Education, do hereby certify that the foregoing Resolution was duly passed, approved and adopted by the Orange County Board of Education at a regular meeting thereof held on the 2nd day of February 2026, and that it was so adopted by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAIN: _____

BY:

Clerk of the Orange County Board of Education

**RESOLUTION AND WRITTEN FINDINGS
OF THE ORANGE COUNTY BOARD OF EDUCATION
TO APPROVE WITH CONDITIONS
THE RENEWAL FOR
SAMUELI ACADEMY**

WHEREAS, the Legislature enacted the Charter Schools Act of 1992, Education Code section 47600 et seq.;

WHEREAS, Education Code section 47607(a)(2) states that a chartering authority may grant one or more subsequent renewals pursuant to Education Code sections 47607 and 47607.2;

WHEREAS, Education Code section 47607(b) requires that renewals shall be governed by the same standards and criteria that apply to new charter petitions as set forth in Education Code section 47605. However, a charter renewal shall not be denied based on the fiscal impact of the charter school on the district or a finding that the charter school is unlikely to serve the interests of the entire community in which the charter school is located;

WHEREAS, in determining whether to grant a charter renewal, a chartering authority shall review both schoolwide performance and the performance of numerically significant student subgroups on the state and local indicators included in the California School Dashboard, giving greater weight to performance on measurements of academic performance. If the Dashboard indicators are not yet available for the most recently completed academic year before renewal, a chartering authority shall consider verifiable data provided by the charter school related to the Dashboard indicators, such as data from the California Assessment of Student Performance and Progress, or any successor system, for the most recent academic year;

WHEREAS, following the review, a renewal of the charter petition may be granted in accordance with a three-tiered system based on the charter school's performance pursuant to Education Code section 47607(c) for high performing charter schools, Education Code section 47607.2(b) for middle performing charter schools and Education Code section 47607.2(a) for low performing charter schools;

WHEREAS, a chartering authority may deny renewal of a charter upon a finding that the school is demonstrably unlikely to successfully implement the program set forth in

the petition due to substantial fiscal or governance factors or a finding that the school is not serving all students who wish to attend. When denying a charter renewal for either of these reasons, a chartering authority shall provide the charter school at least 30 days' notice of the alleged violation and a reasonable opportunity to cure the violation, including the submission of a proposed corrective action plan. The renewal shall be denied if a chartering authority finds either that the corrective action proposed by the charter school has been unsuccessful or that the violations are sufficiently severe and pervasive as to render a corrective action plan unviable. Any finding that a school is not serving all students who wish to attend shall specifically identify the evidence supporting the finding;

WHEREAS, in determining whether to grant a charter renewal for a charter school eligible for the state's Dashboard Alternative School Status, a chartering authority shall consider, in addition to the charter school's performance on the state and local indicators included in the Dashboard, the charter school's performance on alternative metrics applicable to the charter school based on the student population served. The chartering authority may deny a charter renewal only upon making written findings, setting forth specific facts to support the findings that the closure of the charter school is in the best interest of students;

WHEREAS, on November 21, 2025, the Orange County Board of Education ("Board") received a petition from Samueli Academy, a California nonprofit public benefit corporation, for the renewal of Samueli Academy;

WHEREAS, on January 7, 2026, the Board held a public hearing on the charter renewal and received public comment thereon;

WHEREAS, on January 16, 2026, the Board published a Staff report, with recommended findings, prepared by staff members of the Orange County Department of Education ("OCDE");

WHEREAS, on February 2, 2026, the Board at its regular meeting held a public hearing, at which, the Petitioners had equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings, to grant or deny the renewal petition;

NOW, THEREFORE, BE IT RESOLVED that the Board reviewed and considered the renewal Petition and related information received with respect to the renewal Petition, including information presented at the public hearings and in the Staff Report in accordance with Education Code sections 47607;

BE IT FURTHER RESOLVED that the Board adopts the summary findings of fact set forth in the Staff Report published on January 16, 2026, which is attached hereto and integrated herein by this reference;

BE IT FURTHER RESOLVED that the Board approves with conditions, the renewal Petition for a charter school submitted by Samueli Academy, a California nonprofit public benefit corporation for the operation of Samueli Academy for a period of five years, beginning on July 1, 2026, and expiring June 30, 2031.

BE IT FURTHER RESOLVED that approval of the renewal Petition is subject to conditions that address findings as delineated in the staff report published on January 16, 2026. To satisfy the conditions, Samueli Academy and the Board must fully execute an Agreement that addresses all of the findings, as well as the operational relationship between the charter school, the Board and OCDE no later than the Board's regularly scheduled meeting in April 2026.

STATE OF CALIFORNIA)
COUNTY OF ORANGE)
_____)

I, Jorge Valdez, Esq., Clerk of the Orange County Board of Education, do hereby certify that the foregoing Resolution was duly passed, approved and adopted by the Orange County Board of Education at a regular meeting thereof held on the 2nd day of February 2026, and that it was so adopted by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAIN: _____

BY:

Clerk of the Orange County Board of Education

**RESOLUTION AND WRITTEN FINDINGS
OF THE ORANGE COUNTY BOARD OF EDUCATION
TO DENY THE RENEWAL PETITION FOR
SAMUELI ACADEMY**

WHEREAS, the Legislature enacted the Charter Schools Act of 1992, Education Code section 47600 et seq.;

WHEREAS, Education Code section 47607(a)(2) states that a chartering authority may grant one or more subsequent renewals pursuant to Education Code sections 47607 and 47607.2;

WHEREAS, Education Code section 47607(b) requires that renewals shall be governed by the same standards and criteria that apply to new charter petitions as set forth in Education Code section 47605. However, a charter renewal shall not be denied based on the fiscal impact of the charter school on the district or a finding that the charter school is unlikely to serve the interests of the entire community in which the charter school is located;

WHEREAS, in determining whether to grant a charter renewal, a chartering authority shall review both schoolwide performance and the performance of numerically significant student subgroups on the state and local indicators included in the California School Dashboard, giving greater weight to performance on measurements of academic performance. If the Dashboard indicators are not yet available for the most recently completed academic year before renewal, a chartering authority shall consider verifiable data provided by the charter school related to the Dashboard indicators, such as data from the California Assessment of Student Performance and Progress, or any successor system, for the most recent academic year;

WHEREAS, following the review, a renewal of the charter petition may be granted in accordance with a three-tiered system based on the charter school's performance pursuant to Education Code section 47607(c) for high performing charter schools, Education Code section 47607.2(b) for middle performing charter schools and Education Code section 47607.2(a) for low performing charter schools;

WHEREAS, a chartering authority may deny renewal of a charter upon a finding that the school is demonstrably unlikely to successfully implement the program set forth in the petition due to substantial fiscal or governance factors or a finding that the school is

not serving all students who wish to attend. When denying a charter renewal for either of these reasons, a chartering authority shall provide the charter school at least 30 days' notice of the alleged violation and a reasonable opportunity to cure the violation, including the submission of a proposed corrective action plan. The renewal shall be denied if a chartering authority finds either that the corrective action proposed by the charter school has been unsuccessful or that the violations are sufficiently severe and pervasive as to render a corrective action plan unviable. Any finding that a school is not serving all students who wish to attend shall specifically identify the evidence supporting the finding;

WHEREAS, in determining whether to grant a charter renewal for a charter school eligible for the state's Dashboard Alternative School Status, a chartering authority shall consider, in addition to the charter school's performance on the state and local indicators included in the Dashboard, the charter school's performance on alternative metrics applicable to the charter school based on the student population served. The chartering authority may deny a charter renewal only upon making written findings, setting forth specific facts to support the findings that the closure of the charter school is in the best interest of students;

WHEREAS, on November 21, 2025, the Orange County Board of Education ("Board") received a petition from Samueli Academy, a California nonprofit public benefit corporation, for the renewal of Samueli Academy;

WHEREAS, on January 7, 2026, the Board held a public hearing on the charter renewal and received public comment thereon;

WHEREAS, on January 16, 2026, the Board published a Staff report, with recommended findings, prepared by staff members of the Orange County Department of Education ("OCDE");

WHEREAS, on February 2, 2026, the Board at its regular meeting held a public hearing, at which, the Petitioners had equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings, to grant or deny the renewal petition;

NOW, THEREFORE, BE IT RESOLVED that the Board hereby adopts the findings and recommendations set forth in the Staff Report and Findings of Fact dated January 16, 2026, attached hereto and integrated herein by this reference;

BE IT FURTHER RESOLVED that the Board, having fully considered and evaluated the Petition for the renewal of the Samueli Academy, hereby finds granting the

renewal of the Petition not to be consistent with the requirements of Education Code section 47605 and 47607, based upon factual findings made by the Board during the Public Hearing on February 2, 2026 and memorialized in the meeting minutes;

BE IT FURTHER RESOLVED that for the reasons given above, the renewal petition is hereby denied.

STATE OF CALIFORNIA)
COUNTY OF ORANGE)
_____)

I, Jorge Valdez, Esq., Clerk of the Orange County Board of Education, do hereby certify that the foregoing Resolution was duly passed, approved and adopted by the Orange County Board of Education at a regular meeting thereof held on the 2nd day of February 2026, and that it was so adopted by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAIN: _____

BY:

Clerk of the Orange County Board of Education

ORANGE COUNTY BOARD OF

BOARD AGENDA ITEM

Item: Charter Schools #7

February 2, 2026

☒ Mailed ☐ Distributed at meeting

RA

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

SUBJECT: Public Hearing – Ednovate-OC College Prep, Material Revision

DESCRIPTION:

On November 21, 2025, Ednovate-OC College Prep submitted a material revision request seeking authorization to open locations within the boundaries of Orange Unified School District and Irvine Unified School District.

The Orange County Board of Education held a public hearing on January 7, 2026, to consider the level of support for the material revision.

RECOMMENDATION:

Under California Education Code section 47605, on February 2, 2026, the Orange County Board of Education will hold a public hearing to grant or deny the Ednovate-OC College Prep amended charter petition and material revision. At the hearing, petitioners shall have equal time and opportunity to present evidence and testimony responsive to the Orange County Department of Education staff recommendations and findings published on January 18, 2026.

ORANGE COUNTY BOARD

BOARD AGENDA

Item: Charter Schools #8

February 2, 2026

☒ Mailed ☐ Distributed at meeting

RH

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

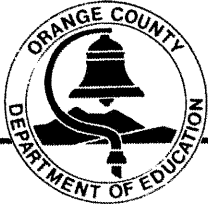
SUBJECT: Board Action – Ednovate-OC College Prep, Material Revision

DESCRIPTION:

Ednovate-OC College Prep is a countywide charter school scheduled to begin operations in the 2026-27 academic year. On November 21, 2025, the school submitted a material revision request seeking authorization to open locations within the boundaries of Orange Unified School District and Irvine Unified School District. A public hearing was held on January 7, 2026, to consider the level of support for the proposed material revision.

RECOMMENDATION:

Orange County Department of Education staff recommend that the Orange County Board of Education approve Ednovate-OC College Prep's revised charter petition and material revision.



MEMO

ORANGE COUNTY DEPARTMENT OF EDUCATION

January 18, 2026

To: Members, Orange County Board of Education

From: Orange County Department of Education Charter Schools Unit

Re: Staff Recommendations and Findings – Ednovate-OC College Prep Material Revision

I. INTRODUCTION

This report presents the findings and recommendations of the Orange County Department of Education staff regarding the material revision request submitted by Ednovate-OC College Prep pursuant to Education Code section 47607, for consideration by the Orange County Board of Education (the Board).

II. BACKGROUND

The Board approved the Ednovate-OC College Prep charter petition for a five-year term from July 1, 2025, through June 30, 2030. Ednovate-OC College Prep is authorized as a countywide charter school and is scheduled to begin serving students in grades nine through twelve in the 2026-2027 school year.

The originally approved charter petition identified Capistrano Unified, Garden Grove Unified, Santa Ana Unified, and Tustin Unified School Districts as potential school site locations.

On November 21, 2025, Ednovate-OC College Prep submitted a request for a material revision to its charter to open school site locations within the boundaries of Orange Unified School District and Irvine Unified School District. In accordance with applicable statutory requirements, a public hearing to consider the level of support for the proposed material revision was held on January 7, 2026.

III. LEGAL STANDARD

Material revisions to a charter school petition are governed by the standards and criteria set forth in Education Code section 47605 and shall include, but are not limited to, reasonably comprehensive descriptions of any new requirements of charter schools enacted into law after the charter was originally granted or last renewed.

IV. SUMMARY OF FINDINGS

Orange County Department of Education staff determined that the revised Ednovate-OC College Prep charter petition meets the standards and criteria outlined in Education Code section 47605.

V. STAFF RECOMMENDATION

Orange County Department of Education staff recommend that the Board approve the Ednovate-OC College Prep material revision to open locations within the boundaries of Orange Unified School District and Irvine Unified School District.

VI. CONCLUSION

The Board has the following options for action regarding a charter petition material revision:

- Option One: Approve the material revision.
- Option Two: Approve the material revision with conditions. This action would result in approval of the revised charter petition and require the charter school to address concerns identified by the Board within established timelines.
- Option Three: Deny the material revision.

* * *

**ORANGE COUNTY BOARD OF
EDUCATION
BOARD AGENDA ITEM**

Item: Charter Schools #9

February 2, 2026

☒ Mailed ☐ Distributed at meeting

2/2

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

SUBJECT: Public Hearing – California Republic Leadership Academy Orange County,
Material Revision

DESCRIPTION:

On December 1, 2025, California Republic Leadership Academy Orange County submitted a material revision request to add an independent study component, the Classical Education Flex Program, to its educational program. On January 7, 2026, The Orange County Board of Education held a public hearing to consider the level of support for the proposed material revision.

RECOMMENDATION:

Pursuant to California Education Code section 47605, the Orange County Board of Education will conduct a public hearing on February 2, 2026, to consider approval or denial of the California Republic Leadership Academy Orange County material revision request. During the hearing, petitioners shall be afforded equal time and opportunity to present evidence and testimony responsive to the Orange County Department of Education staff recommendations and findings published on January 16, 2026.

ORANGE COUNTY BOARD OF

February 2, 2026

BOARD AGENDA ITEM

[X] Mailed [] Distributed at meeting

RW

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

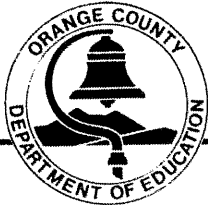
SUBJECT: Board Action – California Republic Leadership Academy Orange County,
Material Revision

DESCRIPTION:

California Republic Leadership Academy Orange County is a countywide charter school approved to begin operations in the 2026–2027 academic year. On December 1, 2025, the school submitted a material revision request seeking authorization to add an independent study component, the Classical Education Flex Program, to its educational program. A public hearing was conducted on January 7, 2026, to receive input regarding the level of support for the proposed material revision.

RECOMMENDATION:

Orange County Department of Education staff recommend that the Orange County Board of Education approve revised petition and material revision for California Republic Leadership Academy Orange County.



MEMO

ORANGE COUNTY DEPARTMENT OF EDUCATION

January 16, 2026

To: Members, Orange County Board of Education

From: Orange County Department of Education Charter Schools Unit

Re: Staff Recommendations and Findings – California Republic Leadership Academy
Orange County Material Revision

I. INTRODUCTION

The following is a summary of the review conducted by Orange County Department of Education staff of the material revision request submitted by California Republic Leadership Academy Orange County, pursuant to Education Code section 47607, and recommendations for consideration by the Orange County Board of Education (the Board).

II. BACKGROUND

The Board approved the California Republic Leadership Academy Orange County charter petition for a five-year term, effective July 1, 2026, through June 30, 2031. California Republic Leadership Academy Orange County is a countywide charter school that is scheduled to begin serving students in transitional kindergarten through grade twelve in the 2026-27 academic year.

On December 1, 2025, California Republic Leadership Academy Orange County submitted a material revision request to add an independent study option, the Classical Education Flex Program, to its educational program. A public hearing to assess support for the proposed revision was held on January 7, 2026.

III. LEGAL STANDARD

Material revisions of charter schools are governed by the standards and criteria described in Education Code section 47605 and shall include, but not be limited to, reasonably comprehensive descriptions of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed.

IV. SUMMARY OF FINDINGS

Orange County Department of Education staff determined that the revised California Republic Leadership Academy Orange County charter petition meets the standards outlined in Education Code section 47605.

V. STAFF RECOMMENDATION

Orange County Department of Education staff recommend that the Board approve the California Republic Leadership Academy Orange County material revision to add an independent study option, the Classical Education Flex Program, to its educational program.

VI. CONCLUSION

The Board has three options for action regarding a charter petition material revision:

- Option One: Approve the material revision.
- Option Two: Approve the material revision with conditions. This action would result in approval of the revised charter petition and require the charter school to address concerns raised by the Board by established timelines.
- Option Three: Deny the material revision.

* * *

ORANGE COUNTY BOARD C

February 2, 2026

BOARD AGENDA I

[X] Mailed [] Distributed at meeting

RH

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

SUBJECT: Public Hearing – Vista Condor Global Academy Renewal Charter Petition

DESCRIPTION:

On December 15, 2025, Vista Condor Global Academy submitted a renewal charter petition. The current charter expired on June 30, 2023. Due to extensions codified in law, the term was extended through June 30, 2026.

RECOMMENDATION:

Per California Education Code, Orange County Board of Education shall hold a public hearing on the provisions of the Vista Condor Global Academy charter petition and consider the level of support for the school at the February 2, 2026, board meeting.

ORANGE COUNTY BOARD C

February 2, 2026

BOARD AGENDA I

[X] Mailed [] Distributed at meeting

RH

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

SUBJECT: Public Hearing – Suncoast Charter School Countywide Charter Petition

DESCRIPTION:

On January 2, 2026, Suncoast Preparatory Academy, a California nonprofit public benefit corporation, submitted a countywide charter school petition to operate Suncoast Charter School. The charter school proposes a nonclassroom-based program serving students in transitional kindergarten through grade twelve for an initial charter term from 2026 through 2031.

The charter operator notified four school districts of intent to open facilities: Fullerton, Fullerton Joint Union High School, Tustin Unified, and Placentia-Yorba Linda Unified.

RECOMMENDATION:

Under California Education Code 47605.6, the Orange County Board of Education will hold a public hearing on the provisions of the charter and consider the level of support for the petition by teachers, parents or guardians, and the school districts where the charter school petitioner proposes to open school facilities at the February 2, 2026, board meeting.

ORANGE COUNTY BOARD OF

February 2, 2026

BOARD AGENDA II

[X] Mailed [] Distributed at meeting

24

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools

SUBJECT: Public Hearing – Orange Springs Charter School, Material Revision

DESCRIPTION:

Orange Springs is a countywide charter school serving students in grades transitional kindergarten through twelve with one location within the boundaries of Santa Ana Unified School District. On January 14, 2026, Orange Springs Charter School submitted a material revision to remove the 19 percent cap on enrollment for independent study, add an additional location within the boundaries of Santa Ana Unified School District, and extend the implementation timeline by one year for opening locations in Anaheim Elementary School District/Anaheim Union High School District to 2028-29 and in Saddleback Valley Unified School District to 2029-30.

RECOMMENDATION:

Pursuant to California Education Code 47605.6, the Orange County Board of Education will hold a public hearing to consider the level of support for the material revision at the February 2, 2026, board meeting.

February 2, 2026

☒ Mailed ☐ Distributed at meeting *24*

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

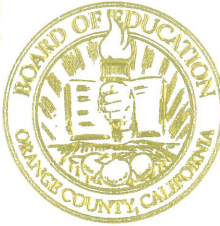
TO: Renee Hendrick, Deputy Superintendent

FROM: Sandra Lee, Ed.D., Associate Superintendent

SUBJECT: Proclamation recognizing February 2026 as Career and Technical Education (CTE) Month

RECOMMENDATION:

Presentation and adoption of the proclamation recognizing February 2026 as Career and Technical Education (CTE) Month.



PROCLAMATION
Career and Technical Education (CTE) Month, February 2026

WHEREAS, February 2026, has been designated National Career and Technical Education (CTE) Month to honor students who have chosen to pursue career and technical education as a means of acquiring real-world skills to compete in the workforce; and

WHEREAS, profound economic and technical changes in Orange County, CA are rapidly reflected in the structure and nature of work, thereby placing new and additional responsibilities on our educational system; and

WHEREAS, CTE prepares students for high-wage and high-demand careers by offering integrated programs of study that link secondary and postsecondary education and lead to the attainment of industry-recognized credentials that align to Orange County's regional workforce; and

WHEREAS, CTE provides students with career exploration opportunities, which enables them to make informed and beneficial decisions about their academic coursework and pursue established programs of study and career pathways; and

WHEREAS, CTE programs provide students with opportunities to gain invaluable hands-on experience through internships, apprenticeships, and other work-based learning experiences that are embedded in CTE programs in Orange County; and

WHEREAS, OC Pathways collaborates with Career Counseling Coordinators in Orange County to focus on ways to further the educational, personal and social growth of students in Orange County; and

WHEREAS, Career Counseling Coordinators, administrators, school counselors, and CTE teachers help students explore their potential and set realistic goals for themselves; and

WHEREAS, OC Pathways supports the Orange County region by identifying and utilizing community resources that can enhance and complement comprehensive CTE programs in Orange County to help students become productive members of society; and

WHEREAS, Career and Technical Education is offering a path to success in the 21st century economy while helping to address the urgent need for skilled labor in high-demand industries, thus enabling numerous Orange County students to secure gainful employment and lead productive, fulfilling lives;

NOW, THEREFORE, BE IT PROCLAIMED, that the Orange County Superintendent of Schools, and the Orange County Board of Education, hereby recognizes February as "CTE Month" and extends sincere best wishes to all the talented young students who have chosen Career and Technical Education as a way to achieve their long-term professional goals.

PASSED AND ADOPTED by the Orange County Board of Education at a meeting held on February 2, 2026, by a unanimous vote of ____.

Stefan Bean, Ed.D.
Orange County Superintendent of Schools

Mari Barke
Board President, 2nd District

Tim Shaw
Board Vice President, 4th District

Jorge Valdes, Esq.
Board Member, 1st District

Ken Williams, D.O.
Board Member, 3rd District

Lisa Sparks, Ph.D.
Board Member, 5th District

Item: Board Recommendations #18

February 2, 2026

☒ Mailed ☐ Distributed at meeting

2*

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Jorge Valdes, Esq., Trustee Area 1

SUBJECT: Resolution #03-26, Supporting Access to Bilingual Education

RECOMMENDATION:

Adopt Resolution #03-26, Supporting Access to Bilingual Education.

**Resolution of The Board of Education
Orange County, California**

Resolution Supporting Access to Bilingual Education
February 2, 2026

WHEREAS, the ability to communicate effectively in multiple languages promotes academic success, critical thinking, and cultural understanding and acceptance, preparing students to thrive in a globally interconnected society; and

WHEREAS, bilingual education fosters cognitive development, literacy, and problem-solving skills, empowering English Learners (EL) and Dual Language Learners to achieve at levels equal to or exceeding those of their native-English-speaking peers; and

WHEREAS, California's linguistic landscape includes more than 1.5 million EL students- representing nearly twenty percent (20%) of the state's public school population- yet opportunities for bilingual education in core and elective subjects remain limited due to a shortage of certified bilingual instructors, lack of state funding, and insufficient access to language programs; and

WHEREAS, research demonstrates that students enrolled in dual-language immersion programs show measurable gains in reading comprehension, literacy, mathematics, and cognitive flexibility; and

WHEREAS, the COVID-19 pandemic interrupted progress in bilingual program development, diminishing teacher pipelines, and widening opportunity gaps for students from immigrant backgrounds; and

WHEREAS, access to bilingual instruction aligns with Orange County Board of Education's mission to promote strong academic performance, prepare students for college and career readiness, and ensure effective teaching and learning across all schools; and

WHEREAS, expanding bilingual education directly supports California's broader commitment to improving education outcomes and strengthening instructional quality in schools;

NOW, THEREFORE, BE IT RESOLVED, that the Orange County Board of Education hereby:

1. Recognizes and affirms the importance of bilingual education in core and elective subjects as an essential component of student academic success;
2. Encourages collaboration among schools, community organizations, and state agencies to expand dual-language immersion opportunities across Orange County public schools;
3. Supports investment in bilingual instructor certification programs and professional development to ensure qualified educators are available to serve student populations;

4. Urges schools and districts to allocate resources toward curriculum development, instructional materials, and expanded access to bilingual education for all students, particularly those in Title I schools;
5. Commits to ongoing review of bilingual education outcomes to ensure the sustainability and effectiveness of programs that celebrate academic excellence.

APPROVED AND ADOPTED this 2nd day of February 2026, at a regular meeting of the Board of Education by a vote of _____.

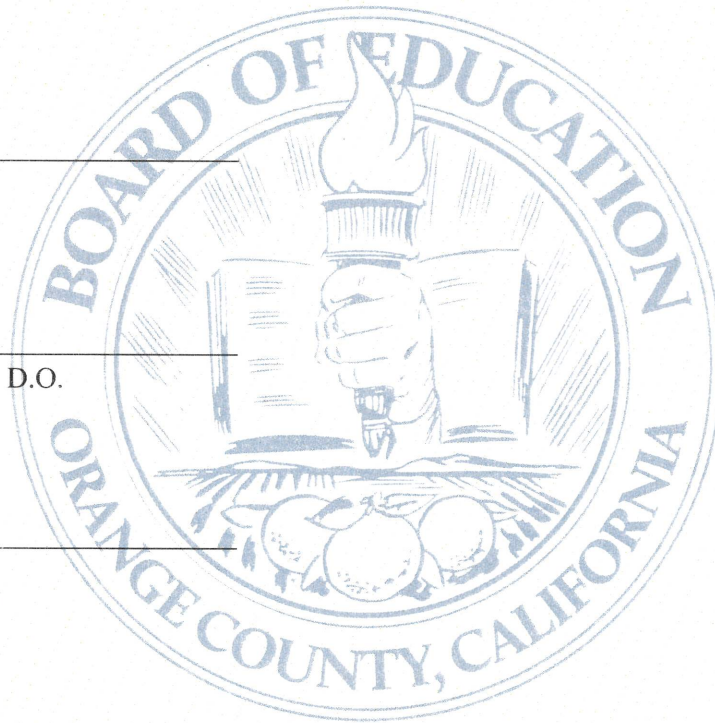
Jorge Valdes, Esq.
1st District

Mari Barke
2nd District

Ken L. Williams, Jr., D.O.
3rd District

Tim Shaw
4th District

Lisa Sparks, Ph.D.
5th District



February 2, 2026

☒ Mailed ☐ Distributed at meeting

RT

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Tim Shaw, Board Vice President

SUBJECT: Resolution #04-26, Recognizing January 27, 2026, as International
Holocaust Remembrance Day

RECOMMENDATION:

Adopt Resolution #04-26, Recognizing January 27, 2026, as International Holocaust Remembrance Day.

RESOLUTION OF THE BOARD OF EDUCATION

ORANGE COUNTY, CALIFORNIA

Recognizing January 27, 2026, as International Holocaust Remembrance Day

WHEREAS, the Holocaust was the systematic, state-sponsored persecution and murder of six million Jews by the Nazi regime and its collaborators between 1933 and 1945, resulting in the deaths of millions of additional victims and representing one of the gravest atrocities in human history; and

WHEREAS, January 27 marks the anniversary of the liberation of Auschwitz-Birkenau in 1945, the largest Nazi concentration and extermination camp, where more than 1.1 million people were murdered, including approximately one million Jews; and

WHEREAS, the United Nations General Assembly designated January 27 as International Holocaust Remembrance Day to honor the victims of the Holocaust and to promote education, remembrance, and vigilance against genocide; and

WHEREAS, antisemitism and anti-Jewish violence have increased at alarming rates in California and across the United States, with anti-Jewish bias events accounting for a disproportionate share of reported religious hate crimes, despite Jewish people comprising a small percentage of the population; and

WHEREAS, Holocaust denial, distortion, and minimization are on the rise, including the use of Nazi symbols and rhetoric, underscoring the urgent need for accurate historical education and moral clarity, particularly within school communities; and

WHEREAS, education about the Holocaust plays a critical role in helping students understand the consequences of hatred and dehumanization, fostering empathy, critical thinking, and respect for human dignity, and reinforcing the values of democracy and inclusion;

NOW, THEREFORE, BE IT RESOLVED, that the **Orange County Board of Education** hereby recognizes **January 27, 2026, as International Holocaust Remembrance Day**; and

BE IT FURTHER RESOLVED, that the Orange County Board of Education honors the memory of the six million Jewish victims of the Holocaust and all others who were persecuted and murdered by the Nazi regime and its collaborators; and

BE IT FURTHER RESOLVED, that the Orange County Board of Education reaffirms its commitment to combating antisemitism, racism, and all forms of hatred through education, truth, and remembrance; and

BE IT FURTHER RESOLVED, that the Orange County Board of Education encourages schools, educators, students, and the broader community to observe this day through age-appropriate learning, reflection, and dialogue, recognizing that understanding the past is essential to ensuring a safer and more inclusive future for all.

PASSED AND ADOPTED by the Orange County Board of Education at a meeting held on February 2, 2026, by the following vote:

AYES:

NOES:

ABSENT:

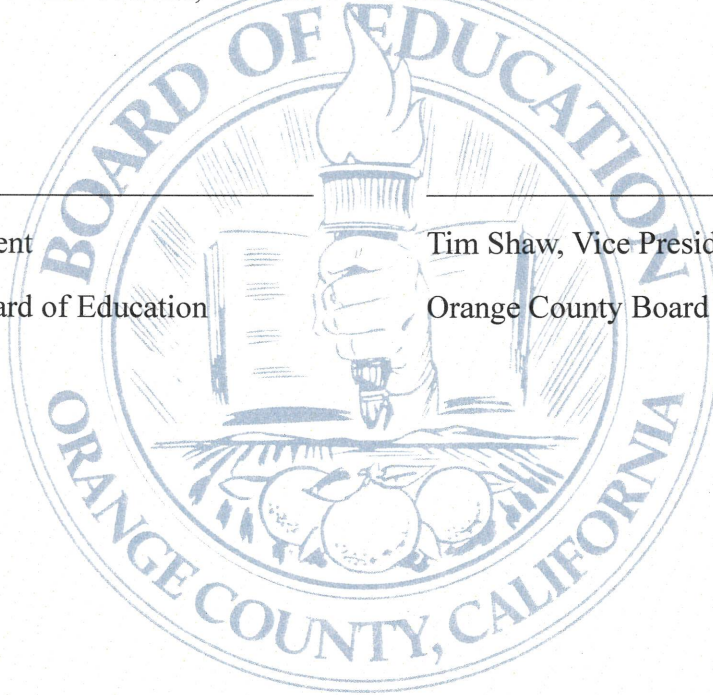
STATE OF CALIFORNIA, COUNTY OF ORANGE

Mari Barke, President

Orange County Board of Education

Tim Shaw, Vice President

Orange County Board of Education



February 2, 2026

☒ Mailed ☐ Distributed at meeting

RA

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Jorge Valdes, Esq., Trustee Area 1

SUBJECT: Resolution #05-26, Support of high-quality charter school petitions

RECOMMENDATION:

Adopt Resolution #05-26, Support of high-quality charter school petitions.

**RESOLUTION SUPPORTING HIGH-QUALITY
CHARTER SCHOOLS IN ORANGE COUNTY**

RESOLUTION #05-26

**A RESOLUTION OF THE ORANGE COUNTY BOARD OF EDUCATION AND
ORANGE COUNTY SUPERINTENDENT OF SCHOOLS ENCOURAGING THE
DEVELOPMENT AND SUPPORT OF HIGH-QUALITY CHARTER PETITIONS**

WHEREAS, Orange County Board of Education ("Board") Policy ("BP") 400-12, adopted in 2005, provides in relevant part, "the Orange County Board of Education encourages the establishment of quality charter schools in Orange County as an integral part of the California education system;" and,

WHEREAS, BP 400-12 further provides, "the Board believes that charter schools provide one opportunity to implement school-level reform and to support innovations which improve student learning and enable students to become self-motivated, competent, and lifelong learners;" and,

WHEREAS, since the adoption of BP 400-12, there have been multiple revisions to California law and regulation concerning charter schools, often referred to as the Charter School Act (California Education Code, Part 26.8, commencing with Section 47600; *see also* Title 5 of the California Code of Regulations); and,

WHEREAS, the Board wishes to restate its commitment to the establishment of high-quality charter petitions in accordance with state and federal law; and,

WHEREAS, the Board and Orange County Superintendent of Schools ("County Superintendent") wish to clarify their expectations that relate to high-quality, high-performing, and highly accountable charter schools and respective charter petitioners within Orange County; and,

WHEREAS, the Board and County Superintendent understand and recognize that neither charter schools nor traditional public schools can be judged under a singular performance standard or metrics.

THEREFORE, BE IT RESOLVED, that the Board and County Superintendent set forth the following expectations regarding several performance criteria relevant to high-quality charter petitions and schools. The Board and County Superintendent shall set forth expectations in the following areas:

- Governance
- Facilities
- Academics
- School Safety and Accessibility
- Community Partnerships

I. GOVERNANCE

A. The Board and County Superintendent encourage the Orange County Department of Education Charter School Unit to prioritize petitions demonstrating sound governance practices, diverse and trained boards, and transparent operations.

B. The Board and County Superintendent support professional development for charter board members on ethics, finance, and compliance.

C. Petitioners shall be advised to provide evidence that the charter school can successfully attract students, rather than merely signatures on a petition. Given that several schools have been approved but have not opened or are not capable of providing accurate enrollment prognostication, the Board and County Superintendent request additional evidence of student commitment.

D. The Board and County Superintendent may prioritize charters and/or petitioners that can demonstrate the ability to operate a school for a specific number of years (e.g., 5, 10, etc.) and who demonstrate to the Board and County Superintendent efforts to mitigate the risk of high turnover and student uncertainty.

E. The Board and County Superintendent require that petitions demonstrate compliance with California public-sector ethics laws, including, but not limited to, avoiding the mere appearance of nepotism or conflicts of interest.

II. FACILITIES

A. The Board and County Superintendent encourage equitable access to facilities under Proposition 39. (See Board Resolution 21-23.)

B. Lease: The charter school and/or petitioners should submit a lease of their facility and all satellite facilities. Although Education Code section 47605(h) requires a location and description of facilities, the lease would confirm that information and inform the authorizer whether the lease terms align with the proposed budget.

C. Insurance: The charter school and/or petitioners shall submit insurance information for the charter school facility or facilities.

D. Certificate of Occupancy ("COA"): The charter school and/or petitioners must submit a COA or a temporary COA, issued pursuant to a building permit for new construction, additions, or changes of occupancy, after all necessary construction has been approved by the building inspector. The charter school and/or petitioners should provide authorizers the most recent COA and/or temporary COA appropriate for educational use, current enrollment and grade levels served.

E. Fire Permit: The charter school and/or petitioners are urged to submit a fire permit to certify that a thorough fire/life/safety inspection has been conducted annually to protect lives and property of those who access the facility.

F. Zoning Compliance: The charter school and/or petitioners are encouraged to provide specific details about their facilities, including zoning compliance and other facility-specific requirements.

III. ACADEMICS

A. Petitioners shall include specific, quantifiable academic goals aligned with state priorities under Education Code section 52060(d). Goals are to address proficiency and growth in core subjects – benchmarks to comparable schools. Academic targets are time-specific and capable of independent verification.

B. Petitioners' curriculum and instructional models shall align with the California Common Core standards.

C. Petitioners must acquire a demonstrable understanding of state assessment systems and accountability expectations.

D. Petitioners are expected to articulate how instructional materials, schedules, interventions, and assessments align with academic goals.

E. The charter school should present evidence of performance at or above state averages on the California Assessment of Student Performance and Progress ("CAASPP").

F. Petitioners are encouraged to provide modeling demonstrating consistent test-score improvement and proficiency rates across all grade levels, as measured by state indicators or equivalent internal assessments.

G. The charter petitioners are encouraged to implement proven instructional strategies and evidence-based interventions for general education and special education populations

H. Petitioner shall demonstrate systems of support and/or interventions to be implemented if the identified instructional program is not serving a particular student and/or student subgroup. Petitioners are encouraged to track individual student progress to clarify adherence to academic goals or Individualized Education Plans ("IEP").

IV. SCHOOL SAFETY AND ACCESSIBILITY

A. To comply with the requirements of Education Code sections 32282 (School Safety Plan), charter petitioners are urged to:

- i. provide emergency contact information for inclusion in the Orange County Department of Education school safety plan;
- ii. assign and train members of charter school staff and administration for inclusion in the Orange County Department of Education school safety plans;

- iii. participate in annual fire/life/safety drills throughout Orange County; and,
- iv. document any and all appropriate emergency supplies in an area accessible during an emergency.

B. To comply with Title II of the Americans with Disabilities Act ("ADA"), charter schools operating on private sites shall:

- i. develop a transition and self-evaluation plan noting barriers to accessibility, and a plan to remove and/or eliminate said barriers within a reasonable period of time; and,
- ii. create an accessibility evaluation survey to determine accessibility obstacles and issues.

C. Charter schools may consider designating an ADA coordinator or an equivalent position, establishing a grievance procedure, and posting notices at all facilities and in all media.

V. COMMUNITY PARTNERSHIPS

A. The charter school and/or petitioners, including, but not limited to non-classroom-based charters, are encouraged to show connections with local community organizations, especially within the targeted demographics, as proof of community support.

APPROVED AND ADOPTED this 2nd day of February 2026 at a regular meeting of the Orange County Board of Education.

AYES: _____
NOES: _____
ABSENT: _____

State of California)
) ss.
County of Orange)

I, Mari Barke, President to the Board of Education of Orange County, California, hereby certify that the foregoing Resolution was duly and regularly adopted by the said Board at a regular meeting thereof held on the 2nd day of February 2026.

IN WITNESS THEREOF, I have hereunto set my hand and seal to this Resolution this 2nd day of February, 2026.

Mari Barke, President
Orange County Board of Education

Tim Shaw, Vice President
Orange County Board of Education

February 2, 2026

☒ Mailed ☐ Distributed at meeting



ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Renee Hendrick, Deputy Superintendent

FROM: Aracely Chastain, Executive Director, Charter Schools Unit

SUBJECT: Explore Academy Notice of Violation

RECOMMENDATION:

Board action on Explore Academy Notice of Violation.



NOTICE OF VIOLATION

Pursuant to Education Code section 47607 and
Title 5, California Code of Regulations section 11968.5.2

**THIS PROPOSED NOTICE OF VIOLATION WILL BE CONSIDERED BY THE
ORANGE COUNTY BOARD OF EDUCATION AT ITS FEBRUARY 2, 2025, MEETING
AND MAY BE ISSUED AND EFFECTIVE ONLY UPON BOARD APPROVAL**

To: Governing Board of Explore Academy Charter School

From: Orange County Board of Education

**Re: Notice of Violation and Opportunity to Cure
Education Code section 47607**

I. INTRODUCTION

This Notice of Violation ("NOV") is issued to the Governing Board of Explore Academy Charter School ("Explore") pursuant to Education Code section ("EC") 47607 and Title 5 California Code of Regulations ("CCR") section 11968.5.2.

Following a review of Explore's 2024-25 and 2025-26 financial records, including the 2025-26 First Interim Report; three (3) Notices of Concern regarding Explore's fiscal condition; Explore's responses to the Notices of Concern; and the findings and recommendations from the Fiscal Crisis and Management Assistance Team ("FCMAT") Report dated October 24, 2025, the Orange County Board of Education ("OCBE") has determined that there are significant fiscal concerns that require immediate attention and corrective action.

The purpose of this NOV is to identify material violations of charter requirements and law that constitute grounds for revocation under EC 47607(f) and to provide Explore with an opportunity to remedy those violations.

II. BACKGROUND

A. Establishment and Operational History of Explore Academy

On October 6, 2021, the Orange County Board of Education ("OCBE") approved the charter petition submitted by ExploreK12, a California nonprofit public benefit corporation, authorizing the establishment and operation of the countywide charter school, Explore Academy ("Petition"). The initial charter term of July 1, 2022, through June 30, 2027, was revised to June 30, 2028, due to state-mandated extensions.

In its Petition, Explore represented that a countywide charter was necessary to support the operation of Explore Academy based on several stated justifications, including the ability to secure financing for multiple permanent facilities, enable students to enroll in courses offered at other

PROPOSED Notice of Violation

Explore Academy campuses, facilitate the transfer of teachers among Explore Academy campuses, and avoid student enrollment preferences tied to school district boundaries. (Petition, pp 8-12).

Following approval, Explore did not commence operations at any school sites until the 2024-25 school year, when it opened only one campus, Explore Prime Academy, serving students in grades TK through 8th grade. To date, Explore has not opened any additional school sites or facilities for instruction.

B. Notices of Concern

As part of the Orange County Department of Education's ("OCDE") oversight and monitoring responsibilities, OCDE staff have issued three (3) Notices of Concern related to this NOV. A Notice of Concern ("NOC") is a written communication, typically issued following informal communications, to document identified risks, areas of concern, or potential noncompliance, and to provide the school with an opportunity to address issues before more formal action is required. The following chart is a chronological presentation of the Notices of Concern that summarizes the problems and the requested corrective actions:

NOTICE OF CONCERN	SUMMARY OF ISSUE(S)
April 14, 2025 Notice of Concern regarding the Fiscal Condition of Explore Academy (Attached as Exhibit A and incorporated herein by reference.)	<p>OCDE issued its first NOC regarding Explore's fiscal condition after reviewing Explore Academy's 2024-25 First and Second Interim Reports, California Longitudinal Pupil Achievement Data System ("CALPADS") data, and ExploreK12 board materials. OCDE identified four primary areas of concern:</p> <ol style="list-style-type: none">1. Inaccurate financial reporting and violations of generally accepted accounting principles ("GAAP"), such as the failure to accrue for known contractual obligations for services provided by TrueNorth, resulted in an overstated financial position.2. Overstated enrollment and revenue projections, including enrollment assumptions exceeding actual enrollment and facility capacity.3. Deficit spending and negative reserves, with a projected negative unrestricted net position and continued structural imbalance.4. Severe cash flow stress and significant debt, including negative cash balances, less than one day of cash on hand, bounced checks, and reliance on debt financing. <p>OCDE required Explore Academy to submit a board-approved fiscal stabilization plan, a third interim report, monthly cash flow projections, and documentation of back-office services. OCDE warned that failure to comply could result in an NOV.</p>

<p>June 11, 2025</p> <p>Second Notice of Concern regarding the Fiscal Condition of Explore Academy</p> <p>(Attached as Exhibit B and incorporated herein by reference.)</p>	<p>After reviewing Explore Academy's response to the first notice, OCDE issued a Second NOC, finding that key issues remained unresolved and that additional concerns had emerged:</p> <ol style="list-style-type: none"> 1. Negative unrestricted net position and failure to meet minimum reserve standards contradict the school's narrative that reserves would be restored by year three. 2. Misrepresentation of reserve and cash standards, including improper reliance on "3–5 days of cash" as sufficient, contrary to CDE, FCMAT, and OCDE guidance. 3. Inconsistent and unreliable enrollment and facility capacity projections are undermining revenue assumptions. 4. Misclassification of financing as revenue, including references to bridge loans and lines of credit as "revenue opportunities," contrary to GAAP. 5. Disbursement control violations, including acknowledgment that checks were issued despite insufficient funds, potentially outside approved fiscal procedures. 6. Unclear accounting treatment of TrueNorth fees, including inconsistent budgeting, expenditure reporting, and a lack of documentation for fee waivers. <p>OCDE required revised multi-year projections, corrected financial narratives, clarification of disbursement practices, and documentation of contractual agreements, again warning that failure to cure could result in a NOV.</p>
<p>November 3, 2025</p> <p>Third Notice of Concern regarding the Fiscal Condition of Explore Academy</p> <p>(Attached as Exhibit C and incorporated herein by reference.)</p>	<p>OCDE issued a Third NOC following review of the 2025–26 Preliminary Budget and verified enrollment data. OCDE concluded that Explore had not cured the prior concerns and that the school's fiscal condition had materially worsened:</p> <ol style="list-style-type: none"> 1. Unrealistic enrollment and Average Daily Attendance ("ADA") assumptions persisted, with the budget assuming 150 students despite verified enrollment of only 73 students. 2. Material overstatement of Local Control Funding Formula ("LCFF") revenue, overstated by nearly \$1 million, converting a projected surplus into a substantial deficit. 3. Understated expenditures and misaligned staffing, including staffing levels inconsistent with enrollment, and a lack of position control. 4. Severe cash flow risk, with projected negative cash beginning March 2026 and increasing payroll and vendor payment risk.

	<p>5. Continued deficit spending and declining net assets, confirmed by unaudited actuals showing a much larger deficit than previously projected.</p> <p>6. Failure to submit required monthly cash flow reports and oversight documents, despite repeated directives.</p> <p>OCDE required the immediate submission of a revised budget, Fiscal Recovery Plan, cash flow reporting, implementation of internal controls, and completion of outstanding compliance items, and expressly stated that failure to comply would result in an NOV.</p>
--	---

C. FCMAT REPORT

Additionally, in June 2025, OCDE and FCMAT entered into an agreement under which FCMAT would conduct an independent fiscal and operational review of Explore. The purpose of this agreement was for OCDE and OCBE to provide additional support to Explore in addressing and curing the deficiencies identified in the Notices of Concern (NOCs). The scope of the review included the following:

- An evaluation of Explore's 2025-26 adopted general fund budget;
- Development of an independent multi-year financial projection for the current and two subsequent fiscal years;
- A review of Explore's Business Services and Human Resources operational processes and procedures; and
- Issuance of findings and recommendations in a final report.

FCMAT completed its review and issued its findings and recommendations in a report dated October 24, 2025 ("FCMAT Report"). (Attached as **Exhibit D** and incorporated herein by reference.) The FCMAT Report independently confirmed and expanded upon OCDE's findings, including concerns about fiscal stability, cash management, enrollment, staffing, and internal controls. For ease of reference, and because specific findings are particularly relevant to the issues identified in this NOV, key portions of the FCMAT Report's Executive Summary are excerpted below, with emphasis added to highlight findings that OCDE considers especially significant:

- Established in 2022 and opening to students in 2024-25, Explore Academy has experienced **turnover at every level of its organization**, including the governing board, executive director, teachers, and support staff. The school is now operating under its fourth director since inception and continues without an office manager.
- At the time of fieldwork, **the school had 73 students and employed seven teachers** for the 2025-26 school year, resulting in a very low student-to-teacher ratio.
- **Despite spending more than \$90,000 on student recruitment efforts since 2022, enrollment has declined by more than 50 students from 2024-25 to 2025-26.**

PROPOSED Notice of Violation

- As a small charter school, Explore Academy relies heavily on consultants for many of its operational functions. **Even these contracted services have experienced turnover:** the school is currently working with its second financial back-office provider and its second human resources provider.
- **Even with significant, immediate expense reductions, the school may be unable to stabilize financially. Cash management and availability are serious concerns. Cash flow has reached a critical level that requires individual payments to be reviewed for available funds before processing, and some payments have been returned for insufficient funds.**
- While this report identifies potential improvements in business and human resources operations, Explore Academy's immediate challenges lie in its fragile cash position and the risk to ongoing operations. **The urgency of cash flow and operational continuity outweighs every other issue.**
- Explore was nonresponsive to FCMAT's requests for necessary documentation. (*See* discussion *infra*, Section V-C).

III. LEGAL AUTHORITY

Education Code section 47607(f) authorizes revocation of a charter if the charter authorizer finds, through a showing of substantial evidence, that the charter school did any of the following:

- Committed a material violation of any of the conditions, standards, or procedures outlined in the charter;
- Failed to meet or pursue any of the pupil outcomes identified in the charter;
- Failed to meet generally accepted accounting principles, or engaged in fiscal mismanagement; or,
- Violated any law.

Before revocation, the chartering authority shall notify the charter school of any violation of this section and give the charter school a reasonable opportunity to remedy the violation, unless the chartering authority determines, in writing, that the violation constitutes a severe and imminent threat to the health or safety of the pupils. (EC 47607(g)).

IV. VIOLATIONS UNDER EDUCATION CODE SECTION 47607(f)

Each violation described in this section, *independently and collectively*, constitutes grounds for revocation pursuant to Education Code section 47607. Despite prior notice and opportunities to cure, the violations described below remain unresolved and continue to threaten Explore's fiscal solvency and operational viability materially.

A. Explore Engaged in Fiscal Mismanagement Due to its Structural Deficits and Insolvencies

Explore has engaged in fiscal mismanagement as evidenced by persistent structural deficit spending, negative fund balances, and an inability to achieve fiscal solvency.

Beginning in the 2024-25 fiscal year, Explore operated with a structural deficit of \$305,722. Explore has continued to project deficit spending in each subsequent fiscal year. Despite repeated notice and direction from OCDE, Explore has not implemented a viable plan to eliminate its structural deficit or restore reserves.

OCDE repeatedly identified these deficiencies in the NOCs and provided opportunities to correct them:

- In the April 2025 NOC, OCDE directed Explore to submit a fiscal stabilization plan to address deficit spending, insufficient reserves, and significant debt obligations.
- In the June 2025 NOC, OCDE determined that Explore's revised projections continued to misrepresent recommended reserve standards and failed to demonstrate a credible path toward solvency.
- In the November 2025 NOC, OCDE confirmed Explore's fiscal condition had further deteriorated, with a worsening deficit, and more than \$1.1 million in negative budget variance attributable to overstated revenues and understated expenditures.

The 2025–26 First Interim Report confirms that Explore continues to operate with a structural deficit, projecting an ending fund balance of negative \$704,390. While the report reflects a short-term operating surplus, this result does not offset the severity of accumulated deficits, negative net assets, and the absence of reserves, which demonstrate an ongoing structural imbalance. Explore's own multi-year projections do not anticipate restoration of a positive fund balance with adequate reserves until the 2028–29 fiscal year, underscoring the magnitude and duration of the school's accumulated losses.

Explore's sustained structural deficits, negative fund balances, failure to maintain reserves, and inability to implement effective corrective measures despite repeated notice constitute fiscal mismanagement within the meaning of EC 47607(f)(3).

B. Explore Engaged in Fiscal Mismanagement Due to Unreasonable Enrollment and Revenue Assumptions

Explore engaged in fiscal mismanagement by repeatedly adopting budgets and multi-year financial projections based on unreasonable and unsupported enrollment and revenue assumptions that were inconsistent with verified data. Explore has **never** accurately forecasted its enrollment. Because student enrollment and average daily attendance are the primary drivers of Explore's LCFF revenue, failing to base projections on reliable, current information materially undermined the accuracy of Explore's financial planning. It directly contributed to its structural deficits and cash instability. The chart below provides a chronological, school-year comparison of projected and actual enrollment, including multi-year projections.

PROPOSED Notice of Violation

School Year	Date	Source/Action	Actual/Projection	Enrollment
2024-25	June 24, 2024	2024/25 Adopted Budget	Projected	170
	October 2, 2024	Census Day	Actual	122
	December 11, 2024	• 24/25 1 st Interim Budget	Projected	129
	March 13, 2025	• 24/25 2 nd Interim Budget	Projected	128
	May 22, 2025	• 24/25 3 rd Interim Budget	Projected	128
2025-26	June 24, 2024	2024/25 Adopted Budget MYP	Projected	198
	December 11, 2024	• 24/25 1 st Interim MYP	Projected	198
	March 13, 2025	• 24/25 2 nd Interim MYP	Projected	152
	May 22, 2025	• 24/25 3 rd Interim MYP	Projected	150
	June 30, 2025	25-26 Adopted Budget	Projected	150
	October 1, 2025	Census Day	Actual	73
	December 11, 2025	• 25/26 1 st Interim Budget	Projected	73
2026-27	June 24, 2024	24-25 Adopted Budget	Projected	226
	December 11, 2024	• 24/25 1 st Interim MYP	Projected	226
	March 13, 2025	• 24/25 2 nd Interim MYP	Projected	185
	May 22, 2025	• 24/25 3 rd Interim MYP	Projected	180
	June 30, 2025	25-26 Adopted Budget MYP	Projected	170
	December 11, 2025	• 25/26 1 st Interim MYP	Projected	105
2027-28	June 30, 2025	25-26 Adopted Budget	Projected	170

PROPOSED Notice of Violation

	December 11, 2025	• 25/26 1 st Interim MYP	Projected	130
--	----------------------	-------------------------------------	-----------	-----

Explore consistently adopted and relied upon materially overstated enrollment and average daily attendance (ADA) projections, despite repeated notice that such projections were unsupported by verified data and, at times, exceeded known facility limitations. Rather than aligning projections with actual enrollment trends, Explore repeatedly revised enrollment figures downward only after budgets and interim reports had been adopted, while continuing to rely on inflated assumptions in subsequent reporting periods and multi-year projections. In every reporting period, projected enrollment exceeded actual, verified enrollment, resulting in significantly overstated revenue projections and a distorted presentation of the school's fiscal condition. This pattern undermines the reliability of the school's financial reporting and calls into question the reasonableness of the assumptions used to evaluate its ongoing fiscal viability.

Following its first year of operation, Explore experienced a significant and rapid decline in enrollment. However, this decline in enrollment was not reflected in its adopted budget for the 2025-26 school year. The 2024-25 Adopted Budget projected enrollment of 170 students but its actual enrollment on Census Day was 122. Despite this, Explore continued to subsequently project 129 students in the First Interim, 128 students in both the Second and Third Interim reports, and ultimately certified at 122 students in CALPADS on June 24, 2025.

A similar pattern is evident in Explore's multi-year projections. Enrollment projections for 2025-26 declined from 198 students in the 2024-25 Adopted Budget to 152 students in the Second Interim and 150 students in the Third Interim. Projections for 2026-27 were likewise reduced from 226 students to 185 students and then to 180 students over the same reporting cycle. These repeated downward revisions demonstrate that the enrollment assumptions were not reasonable when adopted.

Actual enrollment data further underscores these concerns. While Explore certified 122 students for 2024-25, current enrollment for 2025-26 is 73 students, as reflected in both the 2025-26 First Interim and unofficial CALPADS data. This represents a substantial year-over-year decline and is materially below prior projections.

Despite this sharp decline and the school's documented history of overestimating enrollment, Explore's 2025-26 First Interim projects enrollment growth to 105 students in 2026-27 and 130 students in 2027-28. These projected increases are not reasonable absent credible, evidence-based enrollment forecasting. Explore provided no demographic analysis, recruitment plan, or historical trend data to substantiate the projected enrollment rebound.

Should actual enrollment fail to meet these targets, Explore's financial condition will deteriorate further, exacerbating its structural deficit and delaying or preventing restoration of adequate reserves. Even under the school's own projections, Explore does not anticipate achieving a positive fund balance with sufficient reserves until the 2028-29 fiscal year, which demonstrates the magnitude and duration of the school's accumulated losses.

The 2025-26 First Interim Report also reaffirms that Explore continues to operate with a structural deficit, meaning that current revenues are insufficient to cover current expenditures. Despite a nominal operating surplus of \$46,925 for the 2025–26 school year, its accumulated deficits, negative net assets, reliance on unsupported revenue projections, and inadequate reserves confirm a continued structural imbalance. These findings are consistent with OCDE's prior notices and are further corroborated by FCMAT's analysis.

Using verified enrollment data, FCMAT recalculated Explore's LCFF funding and concluded that projected revenues were overstated by approximately \$973,785 for the 2025–26 fiscal year. FCMAT further determined that this overstatement was a principal factor contributing to Explore's projected deficits and negative ending fund balances, which confirmed that unrealistic enrollment assumptions materially distorted Explore's financial outlook.

Under realistic enrollment scenarios, deficits will deepen, net assets will remain negative, and Explore will be unable to meet minimum recommended reserve levels. Consequently, Explore's continued reliance on unsubstantiated enrollment and revenue projections, despite verified enrollment data, constitutes fiscal mismanagement within the meaning of EC 47607(f)(3).

C. Explore Engaged in Fiscal Mismanagement Due to Cash Insolvency, Liquidity Risk, and Debt Dependency

Explore Academy continues to face significant long-term debt obligations and cash flow risks that jeopardize its ability to meet financial commitments and maintain ongoing operations.

As outlined in OCDE's April 14, 2025 Notice of Concern:

- Explore approved \$750,000 in revenue bonds through HJ Sims on May 21, 2024, and received the proceeds on June 14, 2024, but immediately used \$250,000 to repay loans to a private lender and SMART Management.
- The first principal payment of \$100,000 is due to HJ Sims on May 25, 2026. Under the terms of the promissory note, the interest rate will increase from 10% to 12% in the event of default, significantly increasing debt service costs if the school is unable to meet scheduled obligations.
- In addition to the HJ Sims financing, Explore entered into a \$250,000 loan agreement with the California School Finance Authority on October 1, 2024, for the Charter School Revolving Loan.

These combined obligations impose a substantial burden on the school's limited financial resources, particularly given its structural deficit, declining enrollment, and persistent cash flow instability.

The cash flow projections submitted with the 2025–26 First Interim Report rely heavily on a projected January 2026 cash inflow of \$367,816. The school's back-office service provider, Charter Impact, indicated that this amount consisted of several receivables, including an anticipated final PCSGP grant reimbursement of approximately \$276,000. However, on January 7, 2026, Charter Impact confirmed that the PCSGP grant reimbursement submission was updated on December 23, 2025, to \$186,981.07, a reduction of approximately \$89,000 (Exhibit E). The

significant decrease in the expected PCSGP grant reimbursement raises substantial doubt as to the reliability of Explore's cash flow projections and its ability to maintain liquidity throughout the fiscal year.

Cash flow projections for 2026–27 and 2027–28 depend on Explore meeting its unsupported enrollment projections of 105 students in 2026-27 and 130 students in 2027-28. If the school fails to achieve these levels, as current enrollment trends strongly suggest, Explore will likely experience substantial cash shortfalls that could impair its ability to meet payroll, debt service obligations, and other contractual commitments.

These concerns align with FCMAT's findings that the school faces severe cash risk, lacks adequate reserves, and may be unable to continue operations without significant structural changes. The combination of sizeable debt obligations, uncertain receivables, and cash flow projections dependent on unrealistic enrollment assumptions represents a material fiscal risk. Further, it supports OCBE's determination of fiscal mismanagement under Education Code section 47607(f)(3).

D. Explore Engaged in Fiscal Mismanagement Due to Failure to Implement Adequate Fiscal Controls and Oversight

Explore engaged in fiscal mismanagement by failing to implement and enforce basic fiscal controls and oversight mechanisms necessary to ensure responsible stewardship of public funds. These deficiencies, particularly amid declining enrollment, cash instability, and structural deficits, materially contributed to Explore's worsening fiscal condition and impaired its ability to address known financial risks.

The FCMAT Report identified significant weaknesses in Explore's internal fiscal controls, including the absence of effective purchasing and expenditure controls. FCMAT found that Explore did not maintain a purchase order system and routinely incurred expenses without prior verification of available budget authority or cash. The report further noted that "there are no purchasing procedures and the charter school debit card can be used at any time," a practice FCMAT found had a "negative effect on cash flow" and contributed to checks being returned for insufficient funds (Exhibit D, p. 25). FCMAT further noted the absence of a purchase order system and the failure to restrict expenditures in accordance with available cash or budget authority. These deficiencies increased the risk of unauthorized or unbudgeted expenditures and led to payments being returned for insufficient funds.

The FCMAT Report also found that Explore lacked consistent and reliable cash flow monitoring. Explore did not prepare or use monthly cash flow projections in a manner sufficient to anticipate and manage liquidity shortfalls. As a result, Explore was unable to proactively plan for payroll, vendor payments, and debt service obligations, instead relying on reactive measures to address immediate cash crises. FCMAT concluded that the failure to monitor cash flow regularly significantly increases the risk of processing errors, inefficiencies, and service disruptions, particularly during staff absences or transitions.

PROPOSED Notice of Violation

In addition, the FCMAT Report identified deficiencies in staffing oversight and position control. Explore did not maintain an effective position-control system to align staffing levels with enrollment and available funding. As a result, staffing decisions were made without adequate consideration of fiscal impact, contributing to unsustainable personnel costs relative to declining revenues. The lack of board-adopted staffing ratios further undermined Explore's ability to control expenditures and adjust operations in response to changing financial conditions.

The FCMAT Report further identified governance and oversight weaknesses that exacerbated fiscal risk. Explore relied heavily on external consultants and back-office providers for key fiscal functions but did not consistently ensure that contracts were fully executed, adequately documented, or aligned with budgeted resources. In some instances, services were obtained without sufficient documentation or clear linkage to board-approved budgets, weakening fiscal accountability and oversight.

Explore's failure to implement and enforce basic fiscal controls, including purchasing procedures, cash flow monitoring, position control, and contract oversight, created an environment in which fiscal risks were neither identified nor mitigated on time. These deficiencies, as documented in the FCMAT Report, materially impaired Explore's ability to manage public funds responsibly and constitute fiscal mismanagement within the meaning of EC 47607(f)(3).

V. AREAS OF CONCERN AND POTENTIAL VIOLATIONS OF LAW

In addition to the findings of fiscal mismanagement described above, there are areas of concern that raise questions regarding compliance with applicable law. These matters are not alleged as independent bases for revocation in this Notice of Violation. Still, they are documented to reflect the seriousness of the fiscal issues identified and to clarify expectations regarding governance and compliance.

A. Penal Code Section 476a: Issuing a Check with Insufficient Funds

On February 25, 2025, at a regularly scheduled Explore Board Meeting, Explore Board Members and School Leadership discussed the issuance of checks that were subsequently returned for insufficient funds. A board member stated that review of financial records showed "three bounced checks" and questioned why those checks were issued, noting that such occurrences "should have never happened." In response, school representatives acknowledged that checks were issued when sufficient funds were not available and explained that an "executive decision" was made to prioritize payroll while awaiting anticipated funding that did not arrive on schedule.

Penal Code section 476a prohibits the making, drawing, issuing, or delivering of a check with knowledge that sufficient funds are not available to cover the check at the time it is issued. This NOV does not determine whether a violation of Penal Code section 476a occurred. However, the circumstances described during the public board meeting raise concerns regarding potential noncompliance with this provision and underscore the seriousness of Explore's cash management failures.

B. Conflict of Interest: TrueNorth Education Services, LLC

PROPOSED Notice of Violation

Pursuant to Education Code section 47604.1, Explore is subject to conflict of interest laws under Government Code section 1090 *et seq.*, which prohibits public officials and employees from having a financial interest in contracts they make or participate in, and with the Political Reform Act of 1974, which includes provisions concerning conflicts of interest in governmental decision-making.

FCMAT identified circumstances in which external consultants and service providers played substantial roles in Explore's operational and fiscal decision-making, including procurement activities and recommendations related to vendor selection (Exhibit D, p. 42). The report noted that in at least one instance, a consultant facilitated or recommended the selection of another service provider, and that this process occurred with limited documented involvement by Explore's governing board or executive leadership (Exhibit D, pp. 41–42).

Explore entered into a service agreement with TrueNorth Education Services, LLC (TrueNorth) on November 19, 2024. The agreement was amended on July 29, 2025. The FCMAT Report indicates that:

- TrueNorth led the process at the direction of the charter school's board of directors and solicited five potential vendors through Requests for Proposals (RFPs) in accordance with the board's Fiscal Policies and Procedures.
- Explore did not include the Executive Director in the procurement process.
- The executive summary provided to Explore contained a recommendation to select Charter Impact: "TrueNorth highly recommends Charter Impact to replace ICON, the current Back Office provider, and to begin work on May 1, 2025."
- On April 10, 2025, the board approved a service agreement with Charter Impact, effective May 1, 2025.

If an independent contractor participates in governmental decision-making by recommending a service provider, such as with TrueNorth and Charter Impact, Explore should evaluate whether to complete California Form 805, Agency Report of Consultants, or any other applicable disclosures. (*People v. Superior Court (Sahlolbei)* (2017) 3 Cal.5th 230).

C. Public Records Act

Under Education Code section 47604.1, Explore is subject to the California Public Records Act, Government Code section 7920.000 *et seq.* FCMAT reported that Explore was generally nonresponsive to document requests. Explore did not provide the following documents:

- 2023-24 Annual Independent Audit
- 2024-25 Unaudited Actuals Report
- Bank Statements and Reconciliations
- Documentation Supporting Enrollment Projections
- Documentation Supporting Unduplicated Pupil Count (UPC)
- SELPA Allocation Documentation
- Fully Executed Contracts for Multiple Vendors
- Position Control Reports

PROPOSED Notice of Violation

- Classified Salary Schedule
- Payroll Reconciliation Documentation
- Federal Grant Eligibility and Expenditure Support
- Supporting Documentation for Accounts Payable Transactions

The documents requested by FCMAT generally constitute public records subject to disclosure under the California Public Records Act, with appropriate redactions.

VI. OPPORTUNITY TO CURE

Pursuant to Education Code section 47607 and Title 5, California Code of Regulations section 11968.5.2, Explore is provided an opportunity to cure the violations identified in this Notice of Violation. During the remedy period, 5 CCR 11968.5.2, provides that upon receipt of a Notice of Violation, Explore, if it chooses to respond, shall take the following actions:

- Submit to the chartering authority a detailed, written response addressing each identified violation which shall include the refutation, remedial action taken, or proposed remedial action by the charter school specific to each alleged violation. The written response shall be due by the end of the remedy period identified in the Notice of Violation.
- Attach to its written response supporting evidence of the refutation, remedial action, or proposed remedial action, if any, including written reports, statements, and other appropriate documentation.

EXPLORE'S WRITTEN RESPONSE AND ALL SUPPORTING EVIDENCE MUST BE SUBMITTED TO OCDE NO LATER THAN MAY 15, 2026, AT 5:00 P.M.

This deadline provides Explore with a reasonable opportunity to cure the violations identified in this Notice. It reflects Explore's request for additional time through May to develop and support revised enrollment projections. The cure deadline is firm, and no extensions will be granted. Failure to submit a timely response and supporting documentation by the stated deadline will constitute a failure to cure.

VII. REMEDIAL ACTION

If Explore elects to cure the violations identified in this Notice through remedial action, Explore must demonstrate that it has implemented corrective actions, supported by objective and verifiable evidence, sufficient to correct the violations. The remedial actions described below identify the standards by which OCDE will evaluate whether Explore cured the violations through corrective action.¹

A. Enrollment Stabilization and Verification

¹ Nothing in this section shall be construed to limit Explore's ability to refute any alleged violation or demonstrate that the violations have otherwise been cured.

PROPOSED Notice of Violation

To cure violations related to enrollment overstatement and fiscal instability, Explore shall demonstrate that it has achieved and can sustain enrollment at a level sufficient to support fiscal solvency.

REMEDIAL ACTION 1: Explore shall demonstrate confirmed student enrollment (not projected) of no fewer than 105 students for the 2026–27 school year as of May 15, 2026, verified by contemporaneous enrollment records acceptable to OCDE.

REMEDIAL ACTION 2: Explore shall submit a board-approved Enrollment Stabilization Plan supported by objective data. The Enrollment Stabilization Plan shall include:

- a. Current enrollment by grade level,
- b. Documented recruitment and retention strategies that have already been implemented, and
- c. evidence-based enrollment projections for the current fiscal year and the subsequent two fiscal years, grounded in verified enrollment data.

B. Fiscal Stabilization and Recovery

To cure violations related to fiscal mismanagement and structural deficit spending, Explore shall adopt and implement a Fiscal Stabilization and Recovery Plan that demonstrates a credible and sustainable path to long-term fiscal solvency.

REMEDIAL ACTION 3: Explore shall adopt and implement a board-approved Fiscal Stabilization and Recovery Plan demonstrating a credible and sustainable path to fiscal solvency. The Fiscal Stabilization and Recovery Plan shall:

- a. Eliminate ongoing structural deficits within a defined and reasonable timeframe.
- b. Restore a positive unrestricted fund balance and meet minimum recommended reserve levels.
- c. Be supported by revised multi-year financial projections based on verified enrollment data.
- d. Identify specific expenditure reductions, staffing adjustments, and operational changes that have been implemented or will be implemented immediately upon board approval.
- e. Demonstrate fiscal solvency without reliance on speculative revenue sources, unsupported enrollment growth, or additional borrowing.

C. Cash Flow Solvency and Liquidity Controls

To cure violations related to cash management and liquidity risk, Explore shall demonstrate the ability to maintain sufficient cash flow to meet ongoing financial obligations.

REMEDIAL ACTION 4: Explore shall submit monthly cash flow projections for the remainder of the current fiscal year and the subsequent fiscal year, based on verified revenues and expenditures. Cashflow projections must demonstrate:

- a. Ability to maintain positive cash balances sufficient to meet payroll, debt service, and vendor obligations.

PROPOSED Notice of Violation

- b. Explore can meet debt service obligations without impairing instructional operations.

D. Internal Fiscal Controls and Oversight

To cure violations related to internal controls, Explore shall demonstrate that it has implemented effective fiscal oversight mechanisms.

REMEDIAL ACTION 5: Explore shall adopt board-approved fiscal policies governing purchasing, cash management, and contract approval.

- a. Explore shall implement and enforce a purchase order and expenditure approval system that prevents expenditures in excess of budgeted or available cash.
- b. Explore shall implement a position control system aligned with verified enrollment and board-adopted staffing ratios.
- c. Explore shall provide evidence that internal fiscal controls are operational and actively enforced.

REMEDIAL ACTION 6: Explore shall provide fully executed contracts from January 2026 to May 2026 for all fiscal, operational, and instructional service providers.

REMEDIAL ACTION 7: Explore shall wholly and promptly respond to all lawful requests by OCDE, including all outstanding past-due documents previously requested by OCDE.

E. Board Approval and Certification of Remedial Action

REMEDIAL ACTION 8: Explore's response to this Notice must be approved by its governing board at a duly noticed public meeting and must include a board resolution certifying the accuracy and completeness of all submitted information. The response must be supported by documentation demonstrating that remedial actions have been implemented, rather than merely proposed or planned.

VIII. CONCLUSION

Following the conclusion of the reasonable opportunity to cure provided in this Notice, the Orange County Board of Education and the Orange County Department of Education will review and evaluate Explore's written response and any supporting evidence submitted to determine whether the violations identified in this Notice have been cured. Based on that evaluation, the Orange County Board of Education and the Orange County Department of Education will take such further action as may be appropriate and authorized under Education Code section 47607.

**THESE EXHIBITS ARE SUBMITTED IN SUPPORT OF A PROPOSED
NOTICE OF VIOLATION. THE PROPOSED NOTICE OF VIOLATION
HAS NOT BEEN ISSUED AND WILL BE CONSIDERED BY THE
ORANGE COUNTY BOARD OF EDUCATION AT ITS FEBRUARY 2, 2025
MEETING AND MAY BE ISSUED AND EFFECTIVE ONLY UPON
BOARD APPROVAL.**

**EXHIBITS IN SUPPORT OF THE
NOTICE OF VIOLATION AND OPPORTUNITY TO CURE
ISSUED BY THE
ORANGE COUNTY BOARD OF EDUCATION
TO
EXPLOREK12
A CALIFORNIA NONPROFIT PUBLIC BENEFIT CORPORATION,
DOING BUSINESS AS, THE GOVERNING BOARD OF
EXPLORE ACADEMY CHARTER SCHOOL**

EXHIBIT A

NOTICE OF CONCERN

APRIL 14, 2025



**ORANGE COUNTY
DEPARTMENT
OF EDUCATION**

200 KALMUS DRIVE
P.O. BOX 9050
COSTA MESA, CA
92628-9050

(714) 966-4000

FAX (714) 432-1916

www.ocde.us

STEFAN BEAN, Ed.D.
County Superintendent
of Schools

**ORANGE COUNTY
BOARD OF EDUCATION**

MARI BARKE

TIM SHAW

LISA SPARKS, Ph.D.

JORGE VALDES, Esq.

KEN L. WILLIAMS, D.O.

April 14, 2025

Sent via electronic mail and U.S. mail

Sylvia Iglesias, Board Chair
Dr. Laura Schlottman, Executive Director
Explore Academy
2190 N. Canal St.
Orange, CA 92865
siglesias@explorepublicschools.org
lschlottman@explorepublicschools.org

Re: Notice of Concern Regarding the Fiscal Condition of Explore Academy
and Request for a Fiscal Stabilization Plan

Dear Board Chair Iglesias, Board Members, and Dr. Schlottman:

This notice informs the ExploreK12 governing board of identified issues regarding the fiscal health of Explore Academy.

Orange County Department of Education (OCDE) staff reviewed financial data from various sources, including but not limited to the 2024-25 First Interim Report, the 2024-25 Second Interim Report, California Longitudinal Pupil Achievement Data System (CALPADS), ExploreK12 board meeting audio, and board meeting documents. OCDE staff have identified the following concerns:

1. Inaccurate financial reporting and violation of generally accepted accounting principles (GAAP)
2. Over-stated enrollment projections and financial estimates
3. Deficit spending and reserves
4. Cash flow projections and significant debt

Financial Reporting and Violation of GAAP

In a review of the 2024-25 First Interim Report, staff noted that the 5800 series Object Codes did not include an amount for services provided by TrueNorth. TrueNorth is a limited liability corporation that performs various services for Explore Academy, including human resources, marketing and public relations, curriculum and instruction, school culture and management, compliance reporting, student recruitment, facilities, resource management, and risk management. Per the contract, compensation for services equals 8.5 percent of the total LCFF revenue received. According to the first interim budget revenue projections, fees would total \$129,157.

During the fiscal interview on February 5, 2025, Explore Academy's team stated they did not record the fees because TrueNorth is not collecting payment until the school is in a better financial position. Explore Academy's team confirmed that they would pay fees for past services in the future. The OCDE team discussed that Explore Academy's back office services provider should accrue expenses in the same period the services were performed in order to avoid overstating its fiscal position and violating GAAP.

As of the 2024-25 Second Interim Reporting period, Explore Academy has corrected the issue and recorded the expenditures for TrueNorth's services.

Enrollment and Financial Projections

The 2024-25 adopted budget included overinflated enrollment projections of 170 with an average daily attendance (ADA) of 161.5. CALPADS certified enrollment totaled 122 students. Explore revised its enrollment to 129 students and projected ADA to 121.26 for the first interim reporting period. However, the multi-year projections submitted with the first interim report included enrollment of 198 students in 2025-26. This amount appeared to be overstated, as according to the Executive Director at the oversight visit on February 4, 2025, Explore Academy's current facility can only accommodate 150 students.

Per the 2024-25 Second Interim Report, Explore Academy revised its enrollment projections for the fiscal year 2025-26 downward to 152 students. However, projections for 2026-27 include enrollment of 185 students, which exceeds the facility's capacity.

Student enrollment is the primary driver of school funding, and unreasonable enrollment projections lead to an unreliable multi-year budget. Enrollment projections must be based on reasonable considerations, including facility capacity limits.

Deficit Spending and Reserves

Explore Academy began the year with net assets totaling negative \$305,722. The negative beginning balance is due to the school's delayed opening and sizable costs in its planning years, including facilities and administrative expenses.

Per the 2024-25 Second Interim Report, the school is projecting deficit spending totaling \$213,682 and an ending fund balance of negative \$519,404. The projected unrestricted net position is negative \$539,404.

Multi-year projections show operating increases of \$63,558 in 2025-26 and \$19,599 in 2026-27, with ending fund balances totaling negative \$455,847 and negative \$436,247, respectively. However, if Explore Academy does not meet its enrollment projections, it will likely experience deficit spending and a further deterioration of its fund balance.

We recognize that it is common for a charter school in its first or second year of operation to have inadequate reserves. By the end of the third year, we expect to see a positive ending fund balance with reserves at least equal to what the California Department of Education

requires for a district of a similar size. However, by the end of year three, Explore Academy projects a negative ending fund balance.

Cash flow projections and significant debt

Explore Academy's lack of cash, significant debt, and inability to meet its financial obligations severely undermine its fiscal solvency.

Explore Academy has incurred significant debt. On May 21, 2024, the governing board of Explore Academy approved \$750,000 in revenue bonds through HJ Sims. Explore received the proceeds on June 14, 2024, and immediately paid back \$250,000 in loans to a private lender and SMART Management. The first principal payment of \$100,000 is due May 25, 2026. In the event of default, the interest rate will increase from 10% to 12% per the promissory note.

In addition to \$750,000 in revenue bonds, on October 1, 2024, Explore Academy's board approved a \$250,000 loan agreement with the California School Finance Authority for the Charter School Revolving Loan.

The cash flow projections submitted with Explore Academy's 2024-25 Second Interim Report show a negative cash balance at the end of February 2025. Additionally, the projections show less than one day of cash on hand at the end of March and less than four days at the end of April. The cash flows do not include proceeds from the sale of receivables or other short-term borrowing.

At the ExploreK12 board meeting on February 25, 2025, a board member asked why the check register had three overdraft fees. Executive Director Dr. Schlottman stated they were due to checks that had bounced. Additionally, she said they knew the checks would bounce because funding did not come in on the anticipated schedule, and they had to prioritize payroll over paying several vendors.

At the board meeting on March 25, 2025, the back office services provider, ICON School Management (ICON), stated that with an enrollment projection of 162 students for the 2025-26 fiscal year, the school's financial outlook is "extremely bad" and did not anticipate that Explore Academy would be able to make the \$100,000 principal payment to HJ Sims in May 2026. ICON reported that the school would need to secure short-term borrowing of at least \$300,000 to maintain a positive cash flow in the next school year. ICON noted that the school could not afford ICON's and TrueNorth's fees. Following the meeting, ICON submitted a letter to Explore Academy terminating their services agreement effective May 1, 2025.

Required Actions

Explore Academy must complete the following actions by May 20, 2025. Failure to submit the requested information may result in a Notice of Violation.

1. Submit a detailed board-approved fiscal stabilization plan identifying the steps Explore Academy will take to ensure fiscal solvency. The plan should address the concerns identified in this letter, including how the school will repay its debt.
2. Submit a board-approved third interim report with actuals through April 30 using the template provided by OCDE.
3. Beginning on April 20, after the close of the prior month, and each 20th of the month thereafter, submit monthly cash flows with actuals from the beginning of the fiscal year and projections for the next 18 months.
4. Submit a board-approved contract for financial/accounting services from a back-office services provider.

If you have questions regarding this letter or the review process, please contact me at aday@ocde.us or (714) 966-4387.

Sincerely,



Anna Day
Administrator, Charter Schools Fiscal Oversight

c: Aracely Chastain, Director, Orange County Department of Education
Teresa Johnson, Administrator, Charter Schools Unit
Julie Parra, Coordinator, Charter Schools Unit
Sylvia Iglesias, Chair, ExploreK12
Cherlynn Mendoza, Secretary, ExploreK12
Mike Tardiff, Board Member, Explore K12

EXHIBIT B

SECOND NOTICE OF CONCERN

JUNE 11, 2025



June 11, 2025

Sent via electronic mail and U.S. mail

Cecilia Iglesias, Interim Executive Director

Explore Academy

2190 N. Canal St.

Orange, CA 92865

ciglesias@explorepublicschools.org

**ORANGE COUNTY
DEPARTMENT
OF EDUCATION**

200 KALMUS DRIVE
P.O. BOX 9050
COSTA MESA, CA
92628-9050

(714) 966-4000

FAX (714) 432-1916

www.ocde.us

STEFAN BEAN, Ed.D.
County Superintendent
of Schools

Re: Second Notice of Concern Regarding the Fiscal Condition of Explore Academy

Dear Board Members and Ms. Iglesias:

The Orange County Department of Education (OCDE) has completed its review of Explore Academy's May 19, 2025, response to the April 14, 2025, Notice of Concern Regarding the Fiscal Condition of Explore Academy. While we acknowledge your efforts to begin addressing key issues, the response reveals additional concerns and raises questions that require further clarification and correction.

This Second Notice of Concern outlines findings in the areas of fiscal solvency and compliance. The concerns below may represent policy violations, misrepresentations of fiscal standards, and material weaknesses in internal controls.

Negative Unrestricted Net Position and Reserves

The Third Interim Multi-Year Projection (MYP) shows a negative ending fund balance and unrestricted net position of \$(338,931) in FY 2026–27. This directly contradicts the school's response, which claims efforts are underway to ensure a positive ending balance by that time. OCDE staff strongly recommends having an unrestricted net position, or reserves, at least equal to the California Department of Education's (CDE) reserve requirement for a district of a similar size. For a school district with an Average Daily Attendance (ADA) between 0 and 300, CDE requires the greater of 5% of total budgeted expenditures or \$88,000. If we apply this standard to Explore Academy, the amount equates to \$144,966 by the end of FY 2026-27. Explore Academy's current multi-year budget fails to meet the CDE's minimum reserve standards and contradicts its own narrative, claiming compliance by year three.

**ORANGE COUNTY
BOARD OF EDUCATION**

MARI BARKE

TIM SHAW

LISA SPARKS, Ph.D.

JORGE VALDES, Esq.

KEN L. WILLIAMS, D.O.

Explore Academy misrepresents standards for cash reserves by stating, "Charter schools must maintain sufficient cash to meet obligations, with CDE recommending at least 3 to 5 days of cash on hand." This framing is incomplete and potentially misleading. It undermines the seriousness of the liquidity issues by citing the absolute minimum reference point rather than aligning with authoritative guidance or OCDE expectations.

In the publicly available Memorandum of Understanding between the State Board of Education and charter schools under its authorization, the reserve requirement is at a level at least equivalent to a school district of a similar size as identified in California Code of Regulations, Title 5, Section 15450. This would mean a 5% reserve for Explore Academy. For a charter school, reserves are the net position that is not included in determining net investment in capital assets or restricted net position and include liquid assets such as unrestricted cash.

According to the Fiscal Crisis and Management Assistance Team's (FCMAT) California Charter School Accounting and Best Practices Manual, "FCMAT recommends a minimum cash reserve of 5% of total budgeted expenditures and development of a plan to increase this to 10% over five years." FCMAT further states, "Cash reserves are needed to manage cash flow and avoid costly borrowing... A positive fund balance may still coincide with cash shortfalls."

Additionally, OCDE recommends maintaining a minimum of 30 days of cash on hand, which aligns with industry norms and the typical timing of revenue receipts for a charter school. Falling below 30 days of cash exposes the school to payroll risk, vendor default, emergency borrowing, and high-interest bridge loans.

Actual guidance directly contradicts Explore Academy's claim. Three to five days of cash is insufficient and is nowhere cited as a standard in FCMAT, CDE, or OCDE fiscal protocols.

Inconsistent Enrollment and Facility Projections

Explore Academy's response acknowledges that the previously projected enrollment of 185 students in 2026–27 is not feasible. However, the Third Interim MYP still assumes 180 students in FY 2026–27, while the response simultaneously states a revised facility capacity of 170 students. This internal inconsistency raises serious concerns about the reliability of the revenue projections tied to ADA. It remains unclear whether additional facilities required to support enrollment beyond 170 students are secured or are being negotiated.

Misclassification of Financing as Revenue

Explore Academy's response incorrectly describes "bridge loans and/or a line of credit" as revenue opportunities. Such instruments are short-term financing mechanisms, not revenue, under Financial Accounting Standards Board (FASB) accounting standards. While they may provide temporary cash flow, they increase liabilities and do not contribute to the fund balance or net position.

Disbursement Policy Violation

Explore Academy's response indicates the Executive Director acknowledged writing checks despite being informed of insufficient funds. This is in direct violation of the school's Fiscal Policies and Procedure Manual, which requires that the back-office provider process all disbursements, include proper documentation and approval, and be mailed by the back-office provider after approval. Further clarification is needed to determine if the Executive Director physically wrote checks, as suggested in the response, or if the Executive Director submitted documentation and approval to the back-office services provider to process payments.

TrueNorth Fees

It appears TrueNorth's fees are recorded in Object 5809, Other Taxes and Fees, since amounts budgeted for 2025-26 and 2026-27 correspond with fees totaling 5% of LCFF revenue for 2025-26 and 8.5% for 2026-27. According to the current year budget and actuals reported through April 30, 2025, \$54,573 is budgeted, with \$29,983 expended.

Based on the information provided by Explore Academy, TrueNorth waived fees for FY 2024-25. Clarification is needed on actual amounts expended, why any amount remains budgeted in Object 5809, and what the remaining \$24,590 represents. If these funds are no longer obligated, they should be removed or reclassified accordingly in financial reporting.

Required Actions

Explore Academy must complete the following actions by Friday, June 20, 2025. Failure to submit the requested information may result in a Notice of Violation.

1. Submit a revised plan and MYP that meets CDE minimum reserve standards and includes a realistic, documented plan to achieve and sustain a positive unrestricted net position.
2. Submit an updated plan and MYP that aligns enrollment projections with current facility capacity or includes verified assumptions for facility expansion.
3. Amend all financial narratives to clearly distinguish between revenue and financing and avoid characterizing debt instruments as revenue sources.
4. Amend any reference to three to five days of cash as sufficient per CDE's standards in the plan. Clarify that Explore Academy will maintain a minimum of 30 days of cash on hand.
5. Clarify whether the Executive Director physically wrote checks, and if so, provide a corrective action plan addressing staff training on fiscal policies, a review of past disbursements, and internal control reinforcement.
6. Submit a reconciliation of Object 5809 showing the specific services and vendors associated with both expended and budgeted amounts.

7. Provide the board-approved amended agreement between Explore Academy and TrueNorth Support Services LLC that formally documents the waiver of all fees for the 2024–25 fiscal year.

If you have questions regarding this letter or the review process, please contact me at aday@ocde.us or (714) 966-4387.

Sincerely,



Anna Day
Administrator, Charter Schools Fiscal Oversight

c: Aracely Chastain, Executive Director, Orange County Department of Education
Teresa Johnson, Administrator, Charter Schools Unit
Julie Parra, Coordinator, Charter Schools Unit
Cherlynn Mendoza, Secretary, ExploreK12
Mike Tardif, Board Member, ExploreK12
Sal Tinajero, Board Member, ExploreK12
Lloyd Boucher-Reyes, Board Member, ExploreK12

EXHIBITC

THIRD NOTICE OF CONCERN

NOVEMBER 3, 2025



**ORANGE COUNTY
DEPARTMENT
OF EDUCATION**

200 KALMUS DRIVE
P.O. BOX 9050
COSTA MESA, CA
92628-9050

(714) 966-4000

FAX (714) 432-1916

www.ocde.us

STEFAN BEAN, Ed.D.
County Superintendent
of Schools

**ORANGE COUNTY
BOARD OF EDUCATION**

MARI BARKE

TIM SHAW

LISA SPARKS, Ph.D.

JORGE VALDES, Esq.

KEN L. WILLIAMS, D.O.

November 3, 2025

Sent via electronic mail and U.S. mail

Cecilia Iglesias, Executive Director

Explore Academy

2190 N. Canal St.

Orange, CA 92865

ciglesias@explorepublicschools.org

Re: Third Notice of Concern Regarding the Fiscal Condition and Operation of Explore Academy

Dear Board Members and Ms. Iglesias:

The Orange County Department of Education (OCDE) continues to identify significant concerns regarding Explore Academy's fiscal solvency, budget reliability, and compliance. This Third Notice of Concern is issued following OCDE's review of the 2025–26 Preliminary Budget and verified enrollment as of the first day of instruction.

Key findings include unrealistic enrollment and revenue assumptions, understated expenditures, inadequate staffing ratios, cash flow risks, insufficient reserves, and continued noncompliance with required monthly cash flow reporting.

Unrealistic Enrollment and Revenue Assumptions

The 2025–26 Preliminary Budget assumes enrollment of 150 students and an Average Daily Attendance (ADA) of 142.50 (95%), yielding projected Local Control Funding Formula (LCFF) revenue of \$1,923,592. However, as of October 1, 2025, actual enrollment was 73 students, equating to a 95% ADA of 69.35.

Recalculated LCFF revenue based on actual ADA totals \$944,033, which is nearly \$1 million less than budgeted. This materially alters the school's financial outlook, eliminating the projected \$264,486 operating surplus and resulting instead in an estimated \$715,073 deficit, with a projected ending fund balance of negative \$1,535,393.

The Fiscal Crisis and Management Assistance Team (FCMAT) independently reviewed Explore Academy's adopted 2025–26 budget and multi-year projections. Using actual enrollment data, FCMAT projects an ADA of 68.73 and LCFF revenue of \$931,611, confirming that revenues were materially overstated. Overall, FCMAT found revenues overstated by

\$973,785 and expenditures understated by \$149,650, a net negative variance of \$1,123,435.

Staffing Levels and Position Control

The budget includes salary and benefit costs for seven teachers, though eight were in the hiring process as of July 2025, resulting in understated expenditures and a larger deficit.

FCMAT determined that staffing levels are not aligned with enrollment and recommended the adoption of enrollment-based staffing formulas for administrative, certificated, and classified positions, supported by an accurate position control system.

Cash Flow Risks

After adjusting LCFF revenue to 69.35 ADA and aligning cash flow timing with state apportionment schedules, OCDE projections show negative cash beginning March 2026 (–\$47,465) and declining to approximately negative \$521,945 by June 30, 2026. This trajectory indicates significant payroll risk and potential reliance on costly borrowing.

OCDE reiterates that the school must maintain a minimum of 30 days of cash on hand monthly to mitigate payroll and vendor payment risks, consistent with the expectations outlined in the Second Notice.

FCMAT emphasized that without adequate cash, the school is effectively insolvent. It recommends monthly cash monitoring and maintaining 18-month cash flow projections. FCMAT also observed the absence of a purchase order system and noted returned checks for insufficient funds. The immediate implementation of a purchase order system and the prohibition of unbudgeted purchases are required.

Financial Performance

Explore Academy began operations with negative net assets of \$305,722, primarily due to pre-opening costs. The 2024–25 Preliminary Budget projected an operating surplus of \$38,438 and ending net assets of negative \$269,473. However, 2024–25 Unaudited Actuals show a deficit of \$518,045 and ending net assets of negative \$820,320, primarily due to enrollment shortfalls.

Fiscal Year 2024–25	Adopted Budget	1st Interim	2nd Interim	Unaudited Actuals
Revenues	\$2,834,838	\$2,354,580	\$2,311,316	\$1,966,380
Expenditures	\$2,796,400	\$2,334,717	\$2,524,998	\$2,484,425
Surplus/(Deficit)	\$38,438	\$19,863	(\$213,682)	(\$518,045)
Beginning Fund Balance*	(\$307,911)	(\$305,722)	(\$305,722)	(\$302,274)
Ending Fund Balance	(\$269,473)	(\$285,859)	(\$519,404)	(\$820,320)

*Estimated at budget adoption

The continued pattern of deficit spending and declining net assets demonstrates a severe structural imbalance.

Minimum Reserves and Fiscal Recovery

OCDE and FCMAT recommend maintaining reserves consistent with California Department of Education standards for districts of similar size—the greater of 5% of expenditures or \$88,000 for 2025–26. Explore Academy would require \$1.43 million in reductions to meet this minimum, underscoring the need for an immediate, board-approved Fiscal Recovery Plan to restore solvency and reserves.

Continued Noncompliance with Required Monthly Cash Flow Reporting and Failure to Submit Documents to Authorizer

The April 14, 2025, Notice of Concern required monthly submission of cash flow statements by the 20th of each month, including year-to-date actuals and 18 months of projections. As of this notice, Explore Academy remains noncompliant.

Additionally, multiple requested documents remain outstanding through Reportwell, including but not limited to:

- Board roster and certification of employee screening
- Student-family handbook and required website postings
- Certification of annual notices and professional development plan
- September 10, 2025, special board meeting packet and audio
- Monthly enrollment certification (September 2025)
- 2025–26 EPA resolution and 2024–25 final accounting
- Fiscal year-end bank statements and reconciliations (June 2025)
- Independent study policies and agreements
- Fiscal oversight and annual visit documentation

Required Actions

Explore Academy must complete the following actions by **November 26, 2025**. Failure to comply will result in a Notice of Violation.

1. Submit a **revised, board-approved 2025–26 budget and multi-year projections** on the OCDE template, reflecting actual enrollment and updated revenue and expenditure assumptions. Include board minutes and the LCFF calculator in Excel format.
2. Submit a **board-approved Fiscal Recovery Plan** detailing specific reductions (by object and dollar amount) sufficient to eliminate deficit spending and restore and maintain a 5% reserve and sustain 30 days of cash on hand each month to meet payroll and other obligations, with a clear implementation timeline.

3. Submit all **past-due monthly cash flows** and resume on-time submission by the 20th of each month, including actuals to date and 18 months of projections reflecting payment timing and any borrowing plans.
4. Implement a **purchase order system**, restrict debit/credit card use per policy, and prohibit unbudgeted purchases. Provide board-approved policies, training documentation, and a sample PO register.
5. Provide **board action and documentation of staffing ratios** tied to enrollment, and reconcile position control data with the budgeted Full-Time Equivalent (FTE).
6. Provide **board-approved policies** governing accounts payable and cash receipt controls, including reconciliation, prenumbered receipts, and segregation of duties.
7. Certify that all **independent contractor vs. employee classifications** have been reviewed and that all service contracts are properly executed and budgeted.
8. Submit all **outstanding documents** due in Reportwell.

If you have questions regarding this letter or the review process, please contact me at aday@ocde.us or (714) 966-4387.

Sincerely,

Anna Day

Anna Day
Administrator, Charter Schools Fiscal Oversight

c: Aracely Chastain, Executive Director, Orange County Department of Education
Teresa Johnson, Administrator, Charter Schools Unit
Julie Parra, Coordinator, Charter Schools Unit
Mike Tardif, Board Member, ExploreK12
Marilia Balas, Board Member, ExploreK12
Sal Tinajero, Board Chair, ExploreK12
Lloyd Boucher-Reyes, Board President, ExploreK12

EXHIBIT D

FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM

FISCAL REVIEW OF EXPLORE ACADEMY

OCTOBER 24, 2025

Fiscal Review

October 24, 2025

Budget

Amount	Details	Month	Amount
4,500	Mid Year Bonus	June	2,000
2,500	Year End Bonus	December	3,000
		January	5,000

Costs	Expenditure	Month	Amount
2,300	November vacation	November	450
600	Home for the holidays	December	600
350	Gifts for family	December	300
60	Family vacation	July	800
		January	
		January	
		January	
		January	

April	May	June
9,915	13,220	16,000
	7,000	
	0	

Orange County Department of Education

Michael H. Fine
Chief Executive Officer

October 24, 2025

Renee Hendrick, Deputy Superintendent, Operations, Governance and Community Partnerships
Orange County Department of Education
200 Kalmus Drive
Costa Mesa, CA 92626

Dear Deputy Superintendent Hendrick:

In June 2025, the Orange County Department of Education (department) and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to review the Explore Academy's 2025-26 adopted general fund budget, develop an independent multiyear financial projection (MYFP) for the current and two subsequent fiscal years and review the charter school's business and human resources processes and procedures. The study agreement specifies that FCMAT will complete the following:

1. Review the Explore Academy's 2025-26 adopted general fund budget and use it as a baseline to develop an independent multiyear financial projection (MYFP) for the current and two subsequent fiscal years. The MYFP will be a snapshot in time of the charter school's financial status. Make recommendations for expenditure reductions and/or revenue increases to help the charter school eliminate its structural budget deficit, if any.
2. Review the charter school's operational processes and procedures in the Business Services Department and make recommendations for improved efficiency, if any, in the following areas:
 - Budget development.
 - Budget monitoring.
 - Position control.
 - Payroll.
 - Accounts payable.
 - Accounts receivable.
 - Contracted services.
3. Review the charter school's operational processes and procedures in the Human Resources Department and make recommendations for improved efficiency, if any. The review will include, but may not be limited to:
 - Hiring, onboarding and exit interviews.
 - Evaluations.
 - Training and cross-training.
 - Personnel file management.

- Leave management.
4. The team will present the final report to the charter school's governing board at a public meeting following the completion of the review.

This report contains the study team's findings and recommendations.

FCMAT appreciates the opportunity to serve the Orange County Department of Education and extends thanks to the staff for their assistance during fieldwork.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael H. Fine". The signature is written in a cursive, flowing style.

Michael H. Fine
Chief Executive Officer

Table of Contents

About FCMAT	ii
Introduction.....	iv
Background	iv
Study and Report Guidelines	iv
Study Team	v
Executive Summary	vi
Findings and Recommendations.....	1
Multiyear Financial Projection.....	1
Enrollment, Unduplicated Pupils, and Average Daily Attendance	4
Multiyear Financial Projection Assumptions	9
Multiyear Financial Projection Analysis	20
Business Services Operational Processes and Procedures	29
Human Resources.....	45
Appendix	52

About FCMAT

Purpose and Services

FCMAT was created by the California Legislature to help California's transitional kindergarten through grade 14 (TK-14) local educational agencies (LEAs) avoid fiscal insolvency. Today, FCMAT helps LEAs identify, prevent and resolve financial, management, program, data, and oversight challenges; provides professional learning; produces and provides software, checklists, manuals and other tools; and offers other related school business and data services.

FCMAT may be asked to provide fiscal crisis or management assistance by a school district, charter school, community college, county superintendent of schools, the state superintendent of public instruction, or the Legislature.

When FCMAT is asked for help with management assistance or a fiscal crisis, FCMAT management and staff work closely with the requesting LEA to meet their needs. Often this means conducting a formal study using a FCMAT study team that coordinates with the LEA for on-site fieldwork to evaluate specified operational areas and subsequently produces a written report with findings and recommendations for improvement.

For more immediate needs in a specific area, FCMAT offers short-term technical assistance from a FCMAT staff member with the required expertise.

To help meet the need for qualified chief business officials (CBOs) in LEAs, FCMAT offers four different CBO training and mentoring programs that consist of 11 or 12 diverse two-day training sessions over the course of a full year.

For agencies with professional learning needs, FCMAT offers workshops on specific topics. Popular topics include associated student body operations, use of FCMAT's Projection-Pro online financial forecasting software, use of FCMAT's Local Control Funding Formula (LCFF) Calculator, and data reporting for the California Longitudinal Pupil Achievement Data System (CALPADS). FCMAT staff and management also frequently make presentations at various professional conferences.

The California School Information Services (CSIS) service of FCMAT helps the California Department of Education (CDE) operate CALPADS; helps LEAs learn about CALPADS, resolve data issues and meet reporting requirements; and provides LEAs with training and leadership in data management. CSIS also developed and continues to host and improve the Standardized Account Code Structure (SACS) web-based financial reporting system for all California LEAs, and provides ed-data.org, which gives educators, policy-makers, the Legislature, parents and the public quick access to timely and comprehensive data about TK-12 education in California.

Since it was formed, FCMAT has provided LEAs with the types of help described above on more than 2,000 occasions.

FCMAT's administrative agent is the Kern County Superintendent of Schools. FCMAT is led by Michael H. Fine, Chief Executive Officer, and is funded by appropriations in the state budget and modest fees to requesting agencies.

Workshop schedules, manuals, presentation slide decks, Projection-Pro software, LCFF calculators, past reports, an online help desk, and many other resources are available for download or use at no charge on FCMAT's website.

History

FCMAT was created by Assembly Bill 1200 (Chapter 1213, Statutes of 1991) and Education Code (EC) 42127.8. Assembly Bill 107 (Chapter 282, Statutes of 1997) added Education Code 49080, which charged FCMAT with responsibility for CSIS and its statewide data management work, and Assembly Bill 1115 (Chapter 78, Statutes of 1999) codified CSIS' mission.

Assembly Bill 1200 created a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (Chapter 52, Statutes of 2004) gave FCMAT specific responsibilities for districts that have received emergency state loans.

In January 2006, Senate Bill 430 (Chapter 357, Statutes of 2005) amended Education Code 42127.8, and Assembly Bill 1366 (Chapter 360, Statutes of 2005) amended Education Codes 42127.8 and 84041. These new laws expanded FCMAT's services to include charter schools and community colleges, respectively.

Assembly Bill 1840 (Chapter 426, Statutes of 2018) changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting oversight responsibilities from the state to the local county superintendent to be more consistent with the principles of local control, and giving FCMAT new responsibilities associated with the process.

Introduction

Background

The Explore Academy is a public charter school located in Orange, CA in Orange County. Established in October 2021, the charter school began serving students in the 2024-25 school year with a census day enrollment of 126 students. The unduplicated pupil percentage (UPP), which includes students who qualify for free and reduced-price meals, English language learners and foster youth, was 64.75% in 2024-25.

The school serves grades transitional kindergarten through grade eight (TK-8) on a site owned and leased to the school by the Orange Unified School District. As a public charter school, the school is primarily funded through state apportionments and in-lieu of property taxes and receives public funding specific to various state and federal programs. Like traditional school districts in California, all funds received by a charter school are public, collected from taxpayers to be used in the educational process and subject to the same spending restrictions.

The charter school's authorizer is the Orange County Department of Education (OCDE). The authorizer is responsible for ensuring the charter school complies with all applicable laws and the terms of its charter, as outlined in California Education Code (EC) 47604.32. These responsibilities also include monitoring the charter school's fiscal condition, ensuring it complies with all reporting requirements, and providing general guidance and assistance on various educational, operational and fiscal issues.

While charter school governance structures vary throughout the state, a public charter school is required to have a governing board that typically oversees school policies and procedures, school operations, and the charter school's fiscal health. The number of board directors can vary by charter school. Between 2022-23 and 2025-26, the Explore Academy governing board consisted of three to seven directors, each serving a three-year term, and selected through an application process.

The charter school administration consists of an executive director/principal who oversees all the staff and operations of the school.

Study and Report Guidelines

FCMAT visited the charter school on July 30 and 31 to conduct interviews with charter school staff, and to collect and review documents. Following fieldwork, FCMAT continued to review and analyze documents and conducted additional virtual interviews on September 4 and 5. This report is the result of those activities.

FCMAT's reports focus on systems and processes that may need improvement. Those that may be functioning well are generally not commented on in FCMAT's reports. In writing its reports, FCMAT uses the Associated Press Stylebook and its own short internal style guide, which emphasize plain language, capitalize relatively few terms, and strive for conciseness, clarity and simplicity.

Study Team

The study team was composed of the following members:

Robbie Montalbano
FCMAT Intervention Specialist

Alyssa Low
FCMAT Intervention Specialist

Jennifer Nerat
FCMAT Intervention Specialist

Leonel Martinez
FCMAT Technical Writer

All team members reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

Executive Summary

Established in 2022 and opening to students in 2024-25, Explore Academy has experienced turnover at every level of its organization, including the governing board, executive director, teachers, and support staff. The school is now operating under its fourth director since inception and continues without an office manager.

At the time of fieldwork, the school had 73 students and employed seven teachers for the 2025-26 school year, resulting in a very low student-to-teacher ratio. Despite spending more than \$90,000 on student recruitment efforts since 2022, enrollment has declined by more than 50 students from 2024-25 to 2025-26.

As a small charter school, Explore Academy relies heavily on consultants for many of its operational functions. Even these contracted services have experienced turnover: the school is currently working with its second financial back-office provider and its second human resources provider.

Even with significant, immediate expense reductions, the school may be unable to stabilize financially. Cash management and availability are serious concerns. Cash flow has reached such a critical level that individual payments must be reviewed for available funds prior to processing, and some payments have been returned for insufficient funds.

While this report identifies potential improvements in business and human resources operations, Explore Academy's immediate challenges lie in its fragile cash position and the risk to ongoing operations. The urgency of cash flow and operational continuity outweighs every other issue.

The FCMAT team experienced significant challenges in obtaining documentation from Explore Academy across all areas reviewed. As a result, the report identifies areas where the lack of information may limit the accuracy of projections.

Findings and Recommendations

Multiyear Financial Projection

Prudent financial planning is critical for all local educational agencies (LEAs), regardless of their size or structure. Multiyear financial projections (MYFPs) enable charter schools to make budget decisions that strategically align current and future resources with their goals, programs, and Local Control and Accountability Plan (LCAP). Recognizing financial trends is also essential for maintaining charter schools' fiscal health. Monitoring and analyzing year-to-year trends in key budget areas helps charter schools identify areas of concern and take action to mitigate their effects. The primary objective in developing an MYFP is to achieve and sustain a balanced budget that will allow the charter school to maintain its fiscal solvency and ongoing operations.

Multiyear financial projections forecast the future fiscal impact of current decisions. Any forecast of financial data has inherent limitations because calculations are based on certain economic assumptions and criteria, including enrollment trends, cost-of-living adjustments (COLAs), estimates of various one-time and ongoing costs, and changing economic conditions at federal, state and local levels. Therefore, any projection should be viewed as a point-in-time trend based on recent assumptions rather than a prediction of exact amounts. Projections should be updated at least at each financial reporting period, when known economic forecasts change, and before any significant decisions are made that affect the budget, such as salary increases or other major financial commitments. Regular and frequent budget monitoring is important, particularly in times of fiscal uncertainty, when MYFPs become less reliable due to frequent changes in projected federal and state revenues.

California LEAs use various methods and tools to prepare MYFPs. The significant investment in one-time and ongoing restricted programs in transitional kindergarten-12 education over the last four years necessitates the development of MYFPs by resource. This level of detail ensures that projections account for both one-time funds and restricted funds available for expenditure over multiple years. MYFPs completed by resource also ensure that charter schools spend restricted funds before unrestricted, efficiently plan for the best use of funds, and accurately project their fund balances into subsequent years. This tracking can be accomplished using FCMAT's [Projection-Pro](#) multiyear and cash flow projection software, a web-based forecasting tool that is available for free to all school districts, charter schools, and county offices.

Maintaining fiscal solvency while maximizing services to students with available resources is a continuing challenge for governing boards, which have a fiduciary responsibility to ensure the fiscal solvency of their respective charter school. Each charter school has unique financial risk factors based on their reserve levels, enrollment trends, employee compensation, revenue volatility, and various other local factors. Charter schools that plan accordingly can achieve their program goals and objectives while maintaining their fiscal health.

Adjustment Analysis

When developing the MYFP for the charter school, FCMAT reviewed the charter's revenues and expenditures for the prior year (2024-25) to gain a historical understanding of the charter's finances. Normally FCMAT will review at least the two prior years; however, the charter school only began serving students in 2024-25. The team used the school's 2025-26 adopted budget as the basis for determining the projections for the base year and the two subsequent fiscal years and applied industry-standard criteria from

the Department of Finance (DOF), the California Department of Education (CDE) and School Services of California, Inc. (SSC). FCMAT developed its MYFP using the Projection-Pro software.

The first step in FCMAT's MYFP development process was to establish the base year revenues and expenditures. For this analysis, the base year is the 2025-26 fiscal year. Accurately estimating the base revenue and expenditure amounts is crucial because they are the foundation upon which subsequent years' financial projections are built. Without accurate base figures, the projections for the following years may be flawed or unreliable.

Table 1 shows the differences between the charter school's 2025-26 adopted budget and FCMAT's analysis. FCMAT used the school's 2025-26 adopted budget report to determine the beginning fund balance and restricted program fund balances for 2025-26. FCMAT was not provided with the charter school's 2024-25 unaudited actuals report, which would reflect the ending fund balance after all accounting transactions are recorded for the fiscal year. It should also be noted that the charter school has not completed its 2023-24 annual independent audit in accordance with EC 41020 even though financial transactions occurred in that year. As a result, the school's 2024-25 beginning fund balance has not been independently verified by the school's audit firm. Any potential findings could have a material negative impact on the charter school's current budget and estimated ending fund balance.

FCMAT incorporated the reserve for economic uncertainties to be the greater of 5% of total budgeted expenditures or \$88,000 to align with the Orange County Department of Education's reserve recommendation. Differences in projected revenues and expenditures are explained in the "Multiyear Financial Projection Assumptions" section of this report.

Table 1. Multiyear Financial Projection Comparison Summary, Unrestricted and Restricted, 2025-26

Description	Object Code	Charter School 2025-26 Adopted Budget/Base Year Budget	FCMAT Adjustment to Base Year	FCMAT 2025-26 Budget
A. Revenues				
LCFF Sources	8010-8099	\$1,923,592	(\$991,981)	\$931,611
Federal Revenue	8100-8299	\$210,112	(\$86,623)	\$123,489
Other State Revenues	8300-8599	\$312,176	\$7,264	\$319,441
Other Local Revenues	8600-8799	\$26,000	\$97,555	\$123,555
Total Revenue		\$2,471,880	(\$973,785)	\$1,498,096
B. Expenditures				
Certificated Salaries	1000-1999	\$746,053	(\$34,519)	\$711,534
Classified Salaries	2000-2999	\$226,980	(\$49,131)	\$177,849
Employee Benefits	3000-3999	\$187,911	(\$65,656)	\$122,255
Books and Supplies	4000-4999	\$197,610	(\$10,631)	\$186,979
Services and Other Operating Expenditures	5000-5999	\$773,841	\$84,587	\$858,428
Capital Outlay	6000-6999			

Description	Object Code	Charter School 2025-26 Adopted Budget/Base Year Budget		
		FCMAT Adjustment to Base Year		FCMAT 2025-26 Budget
Other Outgo (excluding Transfers of Indirect Costs)	7100-7299 7400-7499	\$75,000	\$225,000	\$300,000
Other Outgo - Transfers of Indirect Costs	7300-7399			
Other Financing Uses - Transfers Out	7600-7629			
Total Expenditures		\$2,207,395	\$149,650	\$2,357,045
E. Net Increase/Decrease in Fund Balance		\$264,485	(\$1,123,435)	(\$858,949)
F. Fund Balance				
Beginning Fund Balance, July 1	9791	(\$449,658)		(\$449,658)
Audit Adjustments	9793			
Adjusted Beginning Balance		(\$449,658)		(\$449,658)
Ending Fund Balance, June 30		(\$185,171)	(\$1,123,435)	(\$1,308,607)

Sources: Charter school's 2025-26 adopted budget and FCMAT's MYFP.

Note: Rounding used in calculations.

Enrollment, Unduplicated Pupils, and Average Daily Attendance

Enrollment and Average Daily Attendance Projections

Enrollment and average daily attendance (ADA) projections are essential elements of any MYFP because student enrollment and ADA by grade level are core components of the Local Control Funding Formula (LCFF), the primary revenue source for charter schools. Accurate enrollment projections are crucial for identifying changes that may significantly impact an LEA's estimated revenue and expenditures in the current and subsequent fiscal years of an MYFP. Failure to identify significant ADA changes and to plan for necessary staffing adjustments in a timely manner can severely affect a charter school's financial position.

Enrollment and ADA projections should be prepared frequently and with sufficient detail to monitor and project class sizes for subsequent years. Timely preparation of projections enables charter schools to respond appropriately to enrollment declines or increases, allowing them to adjust staffing and expenditure budgets accordingly. These projections are also essential for determining instructional priorities, staffing ratios, grade level configurations, and/or future growth and expansion.

Enrollment and ADA projections have inherent limitations because they are based on assumptions rather than exact calculations. Enrollment is influenced by various factors, such as unforeseen events affecting enrollment (e.g., the COVID-19 pandemic), shifts in local and regional demographics and birth rates, and fluctuating local, state, and national economic conditions. Other variables include historical ratios of enrollment progression between grade levels. Therefore, enrollment and ADA projections should be viewed as reasonable forecasts or trends rather than predictions of exact numbers.

In interviews charter school staff shared that several families had disenrolled their students for the 2025-26 school year because of uncertainty surrounding the school's ability to continue as a going concern. Of the 126 students enrolled in 2024-25, 75 students did not re-enroll for 2025-26. As of August 27, 2025, the school reported that 73 new and returning students were enrolled for the 2025-26 school year, which is just less than half of the 150 students the charter had projected to enroll.

FCMAT found that, although the school monitored and analyzed historical enrollment and ADA for the prior year including the loss of 75 students, it did not use that information to develop its revenue projections for 2025-26. To develop its MYFP, FCMAT reviewed the charter school's actual enrollment of 73 students as of August 27, 2025, its unduplicated pupil count (UPC), and its ADA trend for the prior year. The team then used Projection-Pro to prepare projections for the base year and the two subsequent years. These projections were used to calculate LCFF and other federal and state revenue estimates.

Enrollment

The school's 2025-26 adopted budget MYFP projects an enrollment of 150 students in 2025-26, followed by an enrollment of 170 students in 2026-27 and 170 students in 2027-28. FCMAT's enrollment projections differ significantly from the school's projections (see Table 4 in the "Comparison of Charter School and FCMAT Projections" subsection of this report).

Local educational agencies commonly use the cohort survival method to project enrollment, which is also the model used by FCMAT's Projection-Pro software. This method groups students by grade level upon entry and tracks them through each year they remain in school to evaluate the longitudinal relationship

of the number of students advancing from one grade to the next. By doing so, the cohort survival method more closely accounts for student retention and new and departing students by grade.

Cohort survival rates are calculated from historical enrollment data certified on the Fall 1 census day for the California Longitudinal Pupil Achievement Data System (CALPADS), which is always the first Wednesday in October. This data is used to determine the percentage increase or decrease in enrollment between any two grades. For example, if 100 students were certified as enrolled in first grade in 2024-25 and that number increased to 104 in second grade in 2025-26, the cohort survival rate would be 104%, or a ratio of 1.04. These ratios are calculated between each pair of grades over several years. Such ratios are key factors that contribute to the reliability of the projections and depend on the validity of the initial data. Each ratio collectively encompasses the variables that could account for an increase or decrease in the size of a grade cohort as it progresses over time.

The anomaly of 75 students leaving the school and only one year of operational enrollment data ruled out the ability to use a cohort survival method to project enrollment. To account for this, FCMAT used the actual enrollment by grade level as of August 27, 2025, for the 2025-26 base year and then used a simple age-through methodology that assumes a 100% cohort survival rate (each grade level transfers the same number of students to the following year's enrollment) for the 2026-27 and 2027-28 years.

Table 2. Historical Data and FCMAT Enrollment Projections, 2024-25 through 2027-28

	Actual 2024-25	Projected 2025-26	Projected 2026-27	Projected 2027-28
Grade TK	21	9	9	9
Grade K	16	7	9	9
Grade 1	11	11	7	9
Grade 2	13	15	11	7
Grade 3	13	4	15	11
Subtotal TK-3	74	46	51	45
Grade 4	18	6	4	15
Grade 5	17	13	6	4
Grade 6	11	6	13	6
Subtotal 4-6	46	25	23	25
Grade 7	2	2	6	13
Grade 8	4	0	2	6
Subtotal 7-8	6	2	8	19
Total Enrollment	126	73	82	89
Change from Prior School Year		-53	9	7

Sources: CDE Dataquest and FCMAT's MYFP.

Unduplicated Pupil Percentage

The charter school's UPP is used to determine a portion of its LCFF funding, specifically for supplemental and concentration grants. The UPP is the percentage of students identified as English learners, foster youth, or eligible for free or reduced-price meals. Each student is counted only once, even if they meet more than one of these criteria. The UPP for LCFF funding is calculated using a three-year rolling average of the ratio of unduplicated students to total enrollment.

The school's UPP was at 64.75% in 2024-25. The school's 2025-26 adopted budget MYFP projected the number of unduplicated pupils to increase by 18 students in 2025-26 to a total of 97, and a UPP of approximately 64.7%. Following this, the number is expected to increase by 13 students in 2025-26 and remain steady in 2026-27, resulting in a UPP of around 64.7% each year.

FCMAT's UPP projection for each of the projection years is assuming the same ratio of the school's 2024-25 unduplicated pupil count to total enrollment of 64.75% adjusted for rounding by whole student count, which is materially unchanged from the charter school's projection for 2025-26, 2026-27, and 2027-28.

Average Daily Attendance

The total number of student attendance days in a school year is divided by the total number of instructional days to calculate ADA. Charter school LCFF apportionments are based on the current year's second reporting period (P-2) ADA. P-2 ADA is calculated using student attendance from the first day of school through the last school month ending on or before April 15.

The charter school monitors and analyzes enrollment and ADA regularly and by reporting period (i.e., first, second and annual). For its 2025-26 adopted budget MYFP, the charter school used a 95% attendance ratio for its ADA projections. FCMAT reviewed the charter school's enrollment and ADA ratio from 2024-25, comparing the October 2024 CALPADS student enrollment count to the P-2 ADA to determine the ADA-to-enrollment ratios by grade span for grades TK-8. The school's attendance rates by grade span range from 86.3% to 95.8%. FCMAT applied the attendance rates by grade span to project ADA for the 2025-26 year and for the two subsequent years.

Table 3. Historical Data and FCMAT Projections of Enrollment and ADA by LCFF Grade Span, 2024-25 — 2027-28

	Actual 2024-25	Projected 2025-26	Projected 2026-27	Projected 2027-28
Grade TK (for LCFF TK Add-On)				
ADA	20.27	8.62	8.62	8.62
Enrollment	21	9	9	9
ADA-to-Enrollment Ratio	96.52%	95.78%	95.78%	95.78%
Grades TK-3				
ADA	69.39	44.08	48.87	43.12
Enrollment	74	46	51	45
ADA-to-Enrollment Ratio	95.82%	95.83%	95.82%	95.82%
Grades 4-6				
ADA	44.42	22.92	21.09	22.92
Enrollment	46	25	23	25
ADA-to-Enrollment Ratio	91.70%	91.68%	91.70%	91.68%
Grades 7-8				
ADA	5.16	1.73	6.91	16.40
Enrollment	6	2	8	19
ADA-to-Enrollment Ratio	86.33%	86.50%	86.38%	86.32%

Sources: DataQuest, CDE Apportionment Funding Exhibits-Charter School ADA and FCMAT's MYFP.

Note: Variances between DataQuest, Ed-Data and CDE may occur due to timing of certified reports, LEA audit adjustments and LCFF funding requirements.

Comparison of Charter School and FCMAT Projections

FCMAT's enrollment projections were significantly lower than the charter school's in each year, which led to similar differences in UPC and ADA. Table 4 highlights the differences between the charter school's adopted budget projections and FCMAT's projections.

Table 4. Comparison of Charter School and FCMAT MYFP Projections, 2025-26 through 2027-28

Charter School 2025-26 Adopted Budget MYFP	2025-26	2026-27	2027-28
Total Enrollment	150	170	170
Difference from FCMAT	77	88	81
Unduplicated Pupil Count	97	110	110
Difference from FCMAT	50	57	52
Total ADA	142.50	161.50	161.50
Difference from FCMAT (does not include TK)	73.77	84.63	79.06

Sources: Charter school's 2025-26 adopted budget report and FCMAT's MYFP.

Note: Minor discrepancies in reported figures are the result of rounding applied during calculations.

Recommendations

The charter school should:

1. Continue to communicate its educational strengths to parents, guardians, students, and the community; continue to explore options to increase student enrollment.
2. Monitor and project enrollment, unduplicated pupil count (UPC) and ADA using reasonable projection methods adjusted for local factors.
3. Ensure that projected enrollment and associated budgeted LCFF revenue is reasonably attainable based on actual student enrollment.
4. Update projections at each financial reporting period to ensure the most recent data is included in its budget assumptions.
5. Ensure accurate identification and reporting of its UPC; retain documents for audits and to support eligibility determinations.
6. Continue to regularly analyze enrollment and ADA projections, compare projections to actual enrollment and attendance, and adjust budget and staffing as appropriate.
7. Implement strategies to maximize attendance and its UPC.

Multiyear Financial Projection Assumptions

FCMAT's MYFP used the charter school's 2025-26 adopted budget as the baseline for its projections and included the impact of the state's 2025-26 enacted budget. The study team reviewed school records, interviewed charter school and county office staff, and examined various financial documents to gather the necessary information for the MYFP. Assumptions were based on conservative economic factors and estimates, described by major revenue and expenditures categories in line with the state's Standardized Account Code Structure (SACS) for resource and object.

The key planning factors FCMAT used to prepare the MYFP were based on the latest information available at the time, as shown in Table 5 below and further described in the following paragraphs. The assumptions were based on information and figures from the charter school and various statewide sources such as the DOF, CDE, SSC, and other commonly used resources.

The charter school's 2025-26 adopted budget MYFP incorporated some of the same projection factors used by FCMAT including cost-of-living adjustments (COLAs). However, FCMAT also used updated California Consumer Price Index (CPI) figures applied to materials, supplies, and services based on recent economic data. The best practice is to update budgets and MYFPs often, at least at each financial reporting period, using the most recent assumptions to produce the most accurate projections.

Table 5. FCMAT MYFP Budget Assumptions, 2025-26 through 2027-28

Description	2025-26	2026-27	2027-28
Statutory COLA (DOF)	2.30%	3.02%	3.42%
LCFF COLA	2.30%	3.02%	3.42%
State Categorical COLA	2.30%	3.02%	3.42%
California CPI	3.09%	2.82%	2.72%
California Lottery, Unrestricted per ADA	\$195.37	\$190.00	\$190.00
California Lottery, Restricted per ADA (Proposition 20)	\$88.22	\$82.00	\$82.00
Mandate Block Grant, charter schools (Grades K-8), per ADA	\$20.06	\$20.52	\$21.14
Interest Rate Trend for 10-Year Treasuries	4.50%	4.36%	4.40%
Certificated Staff Step-and-Column Increases	2.00%	2.00%	2.00%
Classified Staff Step-and-Column Increases	2.00%	2.00%	2.00%
Health & Welfare Benefits Percent Change	7.00%	7.00%	7.00%
State Unemployment Insurance Rate	0.05%	0.05%	0.05%
Workers' Compensation Insurance Rate	.75%	.75%	.75%
Charter school Indirect Cost Rate	6.20%	6.20%	6.20%
OASDI / Medicare	7.65%	7.65%	7.65%

Sources: FCMAT, DOF, CDE, SSC and the charter school.

Recommendations

The charter school should:

1. Continue to update budgets and MYFPs often and at each financial reporting period.
2. Use the most current information available and assumptions that align with industry standards to develop budgets and MYFPs.

Revenues

Projected revenue was based on validated funding from the CDE, grant letters, and an analysis of charter school estimates for any sources that could not be independently verified. Adjustments were made for any one-time or carryover funds (unspent funds from one year retained for spending in the next year) from previous years.

Local Control Funding Formula Sources

The LCFF is the primary funding source for charter schools and provides the following:

- A base grant per pupil that varies by grade level.
- A supplemental grant that provides an additional 20% of the base grant, multiplied by the charter school's percentage of unduplicated pupils (as measured by the UPC).
- A concentration grant that provides an additional 65% of the base grant, multiplied by the charter school's percentage of unduplicated pupils exceeding 55% of total enrollment.

For charter schools that qualify for concentration grant funds, 15% must be used to increase the number of credentialed and/or classified staff who provide direct services to students.

The LCFF requires charter schools to increase or improve services for unduplicated pupils in proportion to the supplemental and concentration funds they receive relative to base funds. This requirement is known as the minimum proportionality percentage (MPP). If the increases and improvements in services do not meet the MPP requirement, any unused portion of the supplemental and concentration grant funds must be identified in the subsequent year's LCAP and used to provide increased or improved services to unduplicated pupils.

Proposition 30, passed in 2012, temporarily increased state income tax rates on high-income taxpayers. While the income tax increase was initially set to expire in 2018, it was extended through 2030 by Proposition 55. These revenues are deposited into the state's Education Protection Account (EPA) and are a component of state aid for the LCFF entitlement. EPA revenues are received by all LEAs that receive a minimum of \$200 per ADA in EPA revenues.

School districts and charter schools are encouraged to use the [FCMAT LCFF calculator](#) to estimate LCFF funding. FCMAT prepared an LCFF calculation for the charter school using the latest version of the calculator (version 26.2, updated August 1, 2025), which has the same funding rates used by the charter school for its LCFF revenue projections. The distinction between the charter school budget and FCMAT's analysis is the student enrollment assumption. FCMAT used the actual enrollment of 73 students as of August 27, 2025 as the basis for enrollment projections for the current and two subsequent years, while the charter school assumed enrollment of 150 in 2025-26, and 170 in 2026-27 and 2027-28, respectively, resulting in lower LCFF revenue projections as seen in Table 6.

Table 6. FCMAT and Charter School LCFF Calculator Projections, 2025-26 through 2027-28

Description	2025-26		2026-27		2027-28	
	Charter School	FCMAT	Charter School	FCMAT	Charter School	FCMAT
LCFF COLA	2.30%	2.30%	1.07%	3.02%	2.93%	3.42%
Enrollment	150	73	170	82	170	89
ADA	142.50	68.73	161.50	76.87	161.50	82.44
UPC	97	47	110	53	110	58
UPP (three-year average)	64.75%	64.62%	64.75%	64.62%	64.75%	64.75%
Total State Aid Entitlement	\$1,923,592	\$931,611	\$2,273,299	\$1,068,945	\$2,350,969	\$1,175,028

Sources: Charter school assumptions and FCMAT LCFF calculator projections.

Recommendations

The charter school should:

1. Use the most recent LCFF calculator, enrollment, UPC and ADA estimates when preparing and revising LCFF revenue projections.
2. Ensure that projected LCFF revenue is reasonably attainable based on actual, current student enrollment.

Federal Revenue

FCMAT reviewed, verified, and adjusted federal funding amounts for the base year 2025-26 where possible and appropriate. These adjustments resulted in an overall variance compared to the charter school's projections, with FCMAT decreasing federal revenues by a total of \$21,129 as described below.

For 2025-26, FCMAT adjusted the federal funding allocations as follows:

- Increased Title I entitlement by \$7,063; increased Title II entitlement by \$520; and reduced Title IV, Part A entitlement by \$10,000 based on the CDE's most recent allocations.
- Reduced National School Lunch Program (NSLP) funding by \$18,712.

To recognize federal grant entitlements as earned revenue, eligible expenditures must occur in the fiscal year. After FCMAT's initial adjustments to federal entitlements based on CDE's most recent allocations, additional adjustments to budgeted federal revenue were made to match the charter school's budgeted expenditures for each resource as illustrated in the table below. The charter school is eligible to receive the remaining entitlement balances totaling \$65,494 once eligible expenses are identified. It is best practice to spend restricted revenue before unrestricted revenue when allowable.

Table 7. Federal Revenue Entitlement – FCMAT Adjustments

Funding Source	FCMAT Projected 2025-26 Entitlement	Charter School Planned Expenditures	2025-26 Entitlement Remaining
Title I (Resource 3010)	\$27,420	\$19,600	\$7,820
Title II (Resource 4035)	\$3,698	\$2,124	\$1,574
Title IV (Resource 4610)	\$121,428	\$82,128	\$39,300
Special Education (Resource 3310)	\$16,800	\$0	\$16,800

Sources: CDE Exhibits

Explore Academy participates in the School Breakfast and National School Lunch Programs, which operate on a monthly reimbursement basis for the number of meals served to students. The 2025-26 revenue projected by the charter school is based on a per-student amount of \$269. FCMAT applied this factor to current and projected enrollment and adjusted accordingly in each fiscal year of the MYFP.

FCMAT requested but was not provided with the Los Angeles County Special Education Local Plan Area (SELPA) revenue allocations for Explore Academy to verify and adjust federal Special Education program funding in the base year. As a result, no adjustments were made in 2025-26 or the subsequent fiscal years, possibly overstating projected revenue.

The charter school was awarded a Title IV, Part C: Public Charter School Grant entitlement of \$191,696 in June 2022. At the time of interviews, staff indicated they were in the process of reclassifying 2024-25 fiscal year planning and implementation expenditures to the grant for reimbursement. While the charter school's adopted budget has planned grant expenditures of \$121,428 in 2025-26, any prior year expenditures subsequently charged to the grant will reduce any available remaining grant balance. Since FCMAT was not provided with the charter school's 2024-25 unaudited actuals report, verification and adjustment to the remaining available grant balance for expenditures in 2025-26 was not possible. Thus, no adjustments were made.

An important caveat to consider for evaluating and projecting the charter school's federal revenue is that at the time of FCMAT's fieldwork, the charter school had not submitted its LCAP federal addendum to CDE's federal addendum submission system, which is a condition of receiving federal funding. As a result, the charter school was not eligible to receive its 2024-25 federal Title I and Title II entitlements, also making it ineligible for Title IV, Part A funding in 2025-26. FCMAT is assuming that the charter school will submit its LCAP federal addendum on or before March 31, 2026, to become eligible for receiving funding in 2025-26, 2026-27, and 2027-28, as the charter school is now aware of the requirement.

Caution should be exercised when budgeting federal revenues due to uncertainty surrounding the federal budget and changes in enrollment. FCMAT assumed no COLAs and reduced funding levels for all programs in 2026-27 and 2027-28 as a result of reduced enrollment in 2025-26.

The best practice is to regularly update the charter school's revenue estimates as entitlement allocations and grant amounts are finalized, ensuring that budgeted revenues align with the most recent funding allocation schedules. Carryover or unearned revenues from prior years should not be included in the current year budget until the prior year unaudited actuals are completed and should be eliminated from the subsequent years of the MYFP. Including estimates of carryover or unearned revenues before those amounts are known may result in overbudgeting and overspending.

Recommendations

The charter school should:

1. Continue to update revenue budgets throughout the year as entitlements and grant amounts become known, ensuring budgets match award letters and allocations provided by the CDE, SELPA, and other grantor agencies.
2. Estimate federal revenues conservatively, considering historical funding levels and enrollment changes.
3. Submit the LCAP federal addendum to CDE's LCAP federal addendum submission system by the deadline of March 31, 2026.
4. Develop and implement plans to fully expend grant monies in the fiscal year received.

Other State Revenue

FCMAT confirmed other state revenue amounts for 2025-26 using available schedules from the CDE and grant award letters, resulting in a net increase of \$7,264 in state revenues for 2025-26.

For 2025-26, FCMAT added \$37,247 of one-time funding for the new Student Support and Professional Development Discretionary Block Grant included in the 2025-26 State Budget Act. Other state revenues were adjusted in the current and/or subsequent fiscal years to account for changes related to enrollment and ADA (Child Nutrition, Expanded Learning Opportunities Program, Lottery, Mandate Funding, and Mental Health Services). In addition, FCMAT removed SELPA pass-through payments of \$123,555 from Other State Revenue where the charter school had budgeted it and instead included the revenue in Other Local Revenue in alignment with California School Accounting Manual (CSAM) procedures.

Arts and Music in Schools

The state annually determines total Arts and Music in Schools (AMS) funding with the Governor's May Revision. For 2025-26, the appropriation is approximately \$1.04 billion. Of this amount, 70% is allocated based on each LEA's share of statewide enrollment, and 30% is distributed according to the prior year enrollment of economically disadvantaged pupils. Funding allocations are certified with the second principal apportionment in June. FCMAT increased the charter school's 2025-26 AMS allocation by \$3,098 based on CDE's advanced principal apportionment exhibit, and conservatively projected flat revenue for subsequent years of the MYFP in alignment with enrollment projections.

Child Nutrition

Explore Academy receives monthly supplemental state meal reimbursements from CDE based on the number of breakfast and lunch meals served to students. The 2025-26 revenue projected by the charter school is based on a per student amount of \$25. FCMAT applied this factor to current and projected enrollment and made an adjustment of -\$1,805 in the base year.

Expanded Learning Opportunities Program

Since the 2021-22 fiscal year, the Expanded Learning Opportunities Program (ELOP) has provided LEAs with funding to offer after-school and summer enrichment programs for students in TK through grade six. According to the CDE, "expanded learning" refers to before school, after school, summer, or intersession

programs that address students' academic, social, emotional, and physical needs and interests through hands-on, engaging experiences.

Funds are apportioned to LEAs based on prior year P-2 ADA for TK/K-6 ADA and prior year TK/K-12 UPP. FCMAT increased 2025-26 base year funding by \$86,411 based on CDE's advance principal apportionment.

Lottery Funding

The state initially allocates lottery funds on a quarterly basis using the prior year's annual ADA, adjusted by a statewide absence factor of 1.04446, and then adjusts the amounts in the subsequent year once the charter school's final annual ADA is available. FCMAT projected lottery revenues for 2025-26 and subsequent years based on its annual ADA projections, with a per-ADA rate of \$190 for unrestricted lottery and \$82 for restricted instructional materials lottery funds. This resulted in no necessary adjustment to the charter school's 2025-26 projected lottery funds.

Mandate Funding

The state allocates Mandate Block Grant funds using a per-ADA amount, adjusted by the COLA in subsequent years, based on the prior year's P-2 ADA by grade level. The charter school's projected 2025-26 allocation was calculated correctly; therefore, FCMAT made no adjustment for 2025-26. The mandate funding projections in the MYFP are based on FCMAT's P-2 ADA projections and adjusted accordingly.

The Mandate Block Grant provides LEAs with funds to support the costs of various mandated programs and activities identified in Government Code (GC) 17581.6(f). Charter schools can choose to receive this funding or submit a reimbursement claim with the State Controller's Office. To receive Mandate Block Grant funding, charter schools must file an application each year with the CDE. FCMAT was unable to determine if the charter school applied for Mandate Block Grant funding by August 31, 2025, the deadline for the 2025-26 funding cycle. If the charter school did not apply for the funding, an adjustment will be necessary to reduce 2025-26 funding by \$2,453.

Mental Health Services Funding

Before 2023-24, the state allocated funding for mental health services to SELPAs based on their members' funded ADA. Starting in 2023-24, the state began apportioning these funds directly to LEAs based on current year P-2 ADA through the principal apportionment.

FCMAT adjusted the base year to include state mental health services funding of \$5,868. The 2025-26 advance principal apportionment exhibit allocates \$10,097 using prior year P-2 ADA as the base for the advance apportionment; however, since the program is funded on current year ADA, FCMAT calculated the projected final allocation using the current year projected P-2 ADA of 68.73. Subsequent years' allocations in the MYFP are based on its P-2 ADA projections and adjusted by COLA.

Student Support and Professional Development Discretionary Block Grant

The state's 2025-26 enacted budget established the Student Support and Professional Development Discretionary Block Grant, which provides one-time discretionary funding to support teacher professional development in English language arts, English language development, literacy, and mathematics; teacher recruitment and retention; and career pathways and dual enrollment programs.

Funding is allocated based on each LEA's TK-12 ADA as of the 2024-25 P-2, estimated at \$315 per ADA. According to the CDE August 2025 schedule, the charter school's allocation is \$37,247. Funds are available through June 30, 2029, with a final expenditure report due to the CDE by September 30, 2029.

Recommendations

The charter school should:

1. Update revenue budgets throughout the year as entitlements and grant amounts become known, ensuring budgets match award letters and allocations provided by the CDE and other grantor agencies.
2. Ensure other state revenue projections are developed based on the charter school's enrollment and ADA projections as appropriate.

Other Local Revenue

The charter school receives local revenues from a variety of sources, including interest earnings, donations, SELPA pass-through payments, and other miscellaneous sources. In interviews, charter school staff indicated that interest and donations are budgeted in local revenue, and that for 2025-26 interest income was not included as the charter school does not have significant cash reserves on hand to generate interest income. Because donation revenues often cannot be guaranteed from year to year, budgets and MYFPs for donations should be conservative and updated throughout the year based on actual amounts received to date. FCMAT decreased the unrestricted local revenue budget by \$26,000 since at the time of fieldwork, no donations had been received.

As was the case with federal revenue, FCMAT requested but was not provided with Los Angeles County SELPA revenue allocations for Explore Academy to verify and adjust state Special Education program funding in the base year. As a result, no adjustments were made in 2025-26 or the subsequent fiscal years, possibly overstating projected revenue. FCMAT included SELPA pass-through payments using the charter school's projections in Other Local Revenue instead of Other State Revenue as the charter school had budgeted, resulting in an increase in restricted Other Local Revenue of \$123,555.

These adjustments result in a net increase in Other Local Revenue of \$97,555.

Recommendation

The charter school should:

1. Ensure local revenues are budgeted conservatively and adjusted as needed to account for actual amounts received.

Expenditures

FCMAT's MYFP assumes that the charter school's ongoing costs expensed in its 2024-25 check register and general ledger will continue unless adjusted as noted below.

Salaries

The charter school did not provide position control and vacancy reports, so FCMAT was unable to reconcile position control with payroll or budget. The charter school authorizer, OCDE, provided a partial general ledger report that listed names of employees and a total amount paid to each employee. However, they are not the same employees that are now employed with the charter school. The charter school did provide FCMAT with a spreadsheet of assumptions used for the 2025-26 adopted budget. Based on the charter school's assumptions used for its adopted budget, the average cost of a certificated teacher was

\$73,772. However, in reviewing the 2025-26 salary schedule, the average cost of a teacher is actually \$75,776. During fieldwork, the OCDE provided additional documents to aid in this study. Within the board packets provided were employee contracts for review and approval. FCMAT used the salary that was on each employment contract. If a contract was not supplied, the average cost was rounded up to the next salary step, which is step 9. Additionally, in reviewing board documents, assumptions for classified staff and administrative staff are based on employee contracts provided by OCDE board packets, as discussed in fieldwork interviews and website information.

Certificated Salaries

Adjustments were made to decrease certificated salaries by \$34,519 in the 2025-26 budget year based on employee salary contracts, fieldwork interviews and staff information on the charter school website. This represents one administrator, seven teachers and one special education teacher/coordinator vacancy per an EDJOIN posting as of 9/5/25. A \$120,000 projected salary for pupil support was projected in the 2025-26 budget; however, there is no documentation to validate this expense or position, so this assumption was removed from the projection. Certificated salaries were increased by 2% each year, based on FCMAT's analysis of certificated employee step and column data provided by the charter school, in each subsequent year of the projection. This was a reduction from the 3.0% used in the charter school's budget.

Classified Salaries

FCMAT decreased classified salaries by \$49,131 in 2025-26, based on employee salary contracts for the 2025-26 school year as reviewed in board agenda packets provided by OCDE, staffing discussions during fieldwork interviews, and vacancies advertised on EDJOIN. This represents one full-time office manager vacancy, one full-time campus monitor/after-school support, one full-time instructional aide and three part-time paraprofessionals. As of the date of this report, FCMAT was not provided with a classified salary schedule. Therefore, FCMAT built an assumption for a classified salary schedule based on what the charter school is offering in its EDJOIN post for the office manager vacancy and increased each year by 2.00% for each step in each subsequent year of the projection, consistent with the certificated salary schedule. A 2% increase assumption was also used for one full-time instructional aide and three part-time paraprofessional employees whose contract is based on an hourly rate. FCMAT assumed 245 days of work for full-time hourly employees (as detailed on page 52 of the employee handbook). Part-time employees' contract had no start date, nor is it detailed in the employee handbook. Therefore, FCMAT assumed, based on the teacher contract start date of August 1, that part-time employees also returned to work on August 1, 2025, which would equate to 192 days of work.

Benefits

FCMAT reduced the budget for employee benefits by \$65,654 in 2025-26.

The following are the assumptions used for employee benefits:

Table 8. Health and welfare change assumptions, 2025-26 through 2027-28

Description	2025-26	2026-27	2027-28
Health & Welfare Benefits Percent Change	7.00%	7.00%	7.00%
State Unemployment Insurance Rate	0.05%	0.05%	0.05%
Workers' Compensation Insurance Rate	.75%	.75%	.75%
OASDI/Medicare	7.65%	7.65%	7.65%

Sources: FCMAT, SSC and the charter school.

Statutory benefits were adjusted in the subsequent years in proportion to increases or decreases in adjusted certificated and classified salaries. Budgeted health and welfare benefits were decreased by \$10,000 in 2025-26 based on the assumption provided with the charter school's MYFP in proportion to budgeted full-time salaries. FCMAT used the charter school rate increase of 7% based on the full-time equivalent (FTE) staff count in proportion to FTE salaries for the subsequent years of the MYFP.

Books and Supplies

Since 2024-25 was the first year of charter school operations with students, staff stated in fieldwork interviews that they had identified one-time expenditures used to open school and did not include the one-time expenditures in the 2025-26 adopted budget. FCMAT also reviewed the 2024-25 books and supplies expenditures from prior year for reasonableness and reduced them by \$10,631. The charter school's 2025-26 adopted budget did not include the consumer price index (CPI) inflation factor, which FCMAT included in 2025-26 and subsequent years.

Services and Other Operating Expenditures

The charter school provided contracts to FCMAT; however, many were not signed. FCMAT requested signed contracts from the charter school for verification but as of the date of this report, did not receive them. However, they are included in the MYFP assumptions as they were verified through FCMAT's analysis of the charter school's 2024-25 general ledger and the board minutes for contract approvals provided by the charter school's authorizer. Lastly, as part of the assumptions, the charter school's back-office provider supplied information on contracts that would or would not continue and that were considered in the assumptions. Additionally, several contracts had multiyear commitments that are reflected in the MYFP. FCMAT increased the charter school's budgeted 2025-26 expenses by \$84,587. These adjustments, plus annual increases based on the CPI inflation factor, which was not in the original budget, form the basis of the second and third years of the projection.

Capital Outlay

FCMAT reviewed capital outlay budgets for reasonableness using 2024-25 actual expenditures. No capital outlay expenditures were incurred in 2024-25, and none were budgeted for 2025-26. FCMAT assumes no capital outlay expenditure for the current and subsequent years of its projection, as interviews indicate that the charter school has no formal capital outlay plan.

Other Outgo/Indirect Costs

FCMAT applied charges for indirect costs at the maximum allowable rate for each restricted program in the base year and subsequent years to ensure proper program cost accounting, even when this resulted in a contribution to a program's resource from the unrestricted general fund. Indirect costs were based on the CDE's approved rate for charter schools in their first year of operation, which is 6.20%, and were kept the same in the two subsequent years. Indirect costs were increased by \$29,157 in the current budget year.

Debt Service

On May 23, 2024, the charter school entered into a four-year loan agreement with H.J. Simms for \$750,000. Expenditures of \$100,000 for this loan were added to the budget for debt service as the charter school's MYFP only included interest payments and not principal payments to H.J. Simms. This liability terminates upon the final payment in 2028-29 and has been updated in the current fiscal year and two subsequent fiscal years. Additionally, on October 1, 2024, the charter school entered into a three-year loan agreement with the California School Finance Authority (CSFA) for \$250,000. The debt payment for this loan was not included in the budget and increased debt service by \$125,000 in the current and two subsequent years. The term of this loan coincides with the charter school's term (the last year of the current charter term, July 30, 2027).

Contributions

When revenues in restricted programs are insufficient to support program expenditures, a contribution from the unrestricted general fund is required. Restricted programs should be self-supporting except for special education, for which state and federal funding is typically insufficient, and any restricted program the charter school has made a deliberate decision to support with unrestricted general funds.

The charter school's 2025-26 budget projects a contribution of \$23,575 to balance the restricted resources which, for this charter school, is a combination of special education, restricted lottery, Title I, II, IV, expanded learning opportunities program, and Proposition 28 funding. FCMAT increased projected expenditures in 2025-26 to align with expenditures identified in its analysis of the charter school's general ledger and board-approved documents provided by the charter school's authorizer, which increased the contribution to \$261,954 and now includes indirect costs. The contribution is comprised of special education equal to \$182,963 and child nutrition costs (which use resource 5310) equal to \$78,991. The contribution is projected to increase to \$267,428 in 2026-27 and to \$278,197 in 2027-28 due to CPI.

Because of increasing costs year over year, the charter school should reduce expenditures in its restricted resources in 2026-27 and 2027-28 to remain within the projected revenue estimates. All programs that require a contribution from the unrestricted general fund need to be reviewed to determine whether they can be made self-sustaining. Additionally, the charter school can review other restricted program allowable costs to see if any unrestricted expenditures can move to restricted funding if allowable per each grant. FCMAT found no evidence that the charter school monitors contributions to restricted programs to determine if expenditures can be reduced to eliminate contributions from the unrestricted general fund.

The table below shows contributions from the charter school's unrestricted general fund to its restricted resources as projected in FCMAT's MYFP.

Table 9. Unrestricted Contributions to Restricted Resources, 2025-26 through 2027-28

Unrestricted Resources		2025-26	2026-27	2027-28
Unrestricted	0000	(\$261,954)	(\$267,428)	(\$278,197)
Total Unrestricted		(\$261,954)	(\$267,428)	(\$278,197)
Restricted Resources				
Title I, Part A	3010			
Child Nutrition	5310	\$78,991	\$78,399	\$81,657
Special Education	6500	\$182,963	\$189,029	\$196,540
Total Restricted		\$261,954	\$267,428	\$278,197
Balance				

Source: FCMAT

Rounding used in calculations.

Recommendations

The charter school should:

1. Review restricted programs and ensure they are self-sustaining or that adequate funds are available to support them.
2. Use the MYFP to identify programs that may require a contribution from the unrestricted general fund in subsequent years, and act as needed to ensure programs are self-sustaining.

Multiyear Financial Projection Analysis

The primary purpose of an MYFP is to evaluate a charter school's long-term financial sustainability. The MYFP uses current budget assumptions and projects revenues and expenditures over several fiscal years to determine whether the charter school can achieve and sustain a balanced budget and maintain an adequate reserve for economic uncertainties for the current and two subsequent fiscal years.

FCMAT analyzed all general fund revenue sources and expenditures and categorized them by resource. The unrestricted general fund summary below indicates that, based on current assumptions, without revenue increases and/or expenditure reductions, the charter school will deficit spend \$1,102,975 in 2025-26, \$999,487 in 2026-27, and \$888,553 in 2027-28, and will not meet its required reserve for economic uncertainties in any of the three years of the projection.

Unrestricted General Fund

The charter school's general fund budget is a combination of unrestricted general purpose dollars and restricted grants and categorical funding. However, when analyzing the charter school's budget, much attention is focused on the unrestricted budget, in particular deficit spending. The unrestricted general fund summary below shows FCMAT's analysis of the charter school's unrestricted resources.

Table 10: Unrestricted General Fund Summary, 2025-26 through 2027-28

Unrestricted General Fund Summary

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
A. Revenues				
LCFF Sources	8010-8099	\$931,611	\$1,068,945	\$1,175,028
Federal Revenue	8100-8299			-
Other State Revenues	8300-8599	\$33,575	\$36,276	\$39,029
Other Local Revenues	8600-8799			
Total, Revenue		\$965,186	\$1,105,221	\$1,214,057
B. Expenditures				
Certificated Salaries	1000-1999	\$637,115	\$649,857	\$662,854
Classified Salaries	2000-2999	\$75,289	\$76,795	\$78,331
Employee Benefits	3000-3999	\$99,868	\$104,365	\$109,128
Books and Supplies	4000-4999	\$93,070	\$95,695	\$98,297
Services and Other Operating Expenditures	5000-5999	\$630,022	\$647,789	\$665,408
Capital Outlay	6000-6999			
Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	\$300,000	\$290,000	\$238,333
Other Outgo - Transfers of Indirect Costs	7300-7399	(\$29,157)	(\$27,220)	(\$27,938)
Total, Expenditures		\$1,806,207	\$1,837,281	\$1,824,413

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
C. Excess (Deficiency) of Revenues over Expenditures before Other Financing Sources and Uses		(\$841,021)	(\$732,059)	(\$610,356)
D. Other Financing Sources/Uses				
Interfund Transfers				
Transfers In	8900-8929			
Transfers Out	7600-7629			
Other Sources/Uses				
Sources	8930-8979			
Uses	7630-7699			
Contributions	8980-8999	(\$261,954)	(\$267,428)	(\$278,197)
Total, Other Financing Sources/Uses		(\$261,954)	(\$267,428)	(\$278,197)
E. Net Increase (Decrease) in Fund Balance		(\$1,102,975)	(\$999,487)	(\$888,553)
F. Fund Balance, Reserves				
Beginning Fund Balance		(\$449,658)	(\$1,552,633)	(\$2,552,120)
As of July 1 - Unaudited	9791			
Audit Adjustments	9793			
As of July 1- Audited				
Other Restatements	9795			
Adjusted Beginning Balance		(\$449,658)	(\$1,552,633)	(\$2,552,120)
Ending Balance/Net Position, June 30		(\$1,552,633)	(\$2,552,120)	(\$3,440,673)
Components of Ending Fund Balance				
Reserve for Economic Uncertainties	9789			
Unassigned/Unappropriated Amount	9790			

Rounding used in calculations.

Sources: FCMAT, OCDE and charter school.

Restricted General Fund

The charter school did not provide spending plans for its restricted dollars, so FCMAT assumed for special education expenditures the funds would be spent on a special education position vacancy, as well as books and supplies and contracted services for the balance that aligns with prior year expenditures. For child nutrition, FCMAT moved all child nutrition related expenditures to restricted resource 5310. For all other restricted programs, FCMAT reviewed expenses from 2024-25 and projected expenditures where possible with any remaining unallocated funds, increasing the unrestricted ending fund balance or reducing

revenues for those programs subject to unearned revenues. (See Table 7 for federal revenue available to the charter).

The following table summarizes FCMAT's projections for the charter school's restricted resources.

Table 11: Restricted General Fund Summary, 2025-26 through 2027-28

Restricted General Fund Summary

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
A. Revenues				
LCFF Sources	8010-8099			
Federal Revenue	8100-8299	\$123,489	\$128,226	\$129,984
Other State Revenues	8300-8599	\$285,866	\$164,162	\$169,662
Other Local Revenues	8600-8799	\$123,555	\$123,555	\$123,555
Total, Revenue		\$532,910	\$415,943	\$423,202
B. Expenditures				
Certificated Salaries	1000-1999	\$74,419	75,907	\$77,426
Classified Salaries	2000-2999	\$102,560	\$104,611	\$106,703
Employee Benefits	3000-3999	\$22,387	\$23,335	\$24,336
Books and Supplies	4000-4999	\$93,909	\$97,259	\$100,299
Services and Other Operating Expenditures	5000-5999	\$228,406	\$235,120	\$242,346
Capital Outlay	6000-6999			
Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499			
Other Outgo - Transfers of Indirect Costs	7300-7399	\$29,157	\$27,220	\$27,938
Total, Expenditures		\$550,838	\$563,452	\$579,048
C. Excess (Deficiency) of Revenues over Expenditures before Other Financing Sources and Uses		(\$17,928)	(\$47,509)	(\$155,846)
D. Other Financing Sources/Uses				
Interfund Transfers				
Transfers In	8900-8929			
Transfers Out	7600-7629			
Other Sources/Uses				
Sources	8930-8979			
Uses	7630-7699			
Contributions	8980-8999	\$261,954	\$267,428	\$278,197

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
Total, Other Financing Sources/Uses		\$261,954	\$267,428	\$278,197
E. Net Increase (Decrease) in Fund Balance		\$244,026	\$119,918	\$122,350
F. Fund Balance, Reserves				
Beginning Fund Balance				
As of July 1 - Unaudited	9791		\$244,026	\$363,944
Audit Adjustments	9793			
As of July 1- Audited				
Other Restatements	9795			
Adjusted Beginning Balance				
Ending Balance/Net Position, June 30		\$244,026	\$363,944	\$486,295
Components of Ending Fund Balance				
Nonspendable	9710-9719			
Restricted	9740	\$244,026	\$363,945	\$486,295

Rounding used in calculations.

Sources: FCMAT, OCDE and charter school and the charter school.

Combined General Fund

The combined general fund summary below shows FCMAT's analysis of all the charter school's unrestricted and restricted general fund sources. FCMAT projects that the charter school will neither be able to meet the minimum reserve requirement nor maintain a positive unrestricted ending fund balance in the current and subsequent years of the projection.

Table 12: Combined General Fund Summary, 2025-26 through 2027-28

Combined General Fund Summary

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
A. Revenues				
LCFF Sources	8010-8099	\$931,611	\$1,068,945	\$1,175,028
Federal Revenue	8100-8299	\$123,489	\$128,226	\$129,985
Other State Revenues	8300-8599	\$319,441	\$200,438	\$208,691
Other Local Revenues	8600-8799	\$123,555	\$123,555	\$123,555
Total, Revenue		\$1,498,096	\$1,521,164	\$1,637,259
B. Expenditures				
Certificated Salaries	1000-1999	\$711,534	\$725,765	\$740,280

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
Classified Salaries	2000-2999	\$177,849	\$181,406	\$185,034
Employee Benefits	3000-3999	\$122,255	\$127,700	\$133,464
Books and Supplies	4000-4999	\$186,979	\$192,954	\$198,596
Services and Other Operating Expenditures	5000-5999	\$858,428	\$882,908	\$907,754
Capital Outlay	6000-6999			
Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	\$300,000	\$290,000	\$238,333
Other Outgo - Transfers of Indirect Costs	7300-7399			
Total, Expenditures		\$2,357,045	\$2,400,733	\$2,403,461
C. Excess (Deficiency) of Revenues over Expenditures before Other Financing Sources and Uses		(\$858,949)	(\$879,569)	(\$766,203)
D. Other Financing Sources/Uses				
Interfund Transfers				
Transfers In	8900-8929			
Transfers Out	7600-7629			
Other Sources/Uses				
Sources	8930-8979			
Uses	7630-7699			
Contributions	8980-8999			
Total, Other Financing Sources/Uses				
E. Net Increase (Decrease) in Fund Balance		(\$858,949)	(\$879,569)	(\$766,203)
F. Fund Balance, Reserves				
Beginning Fund Balance		(\$449,658)	(\$,308,607)	(\$2,188,176)
As of July 1 - Unaudited	9791			
Audit Adjustments	9793			
As of July 1- Audited				
Other Restatements	9795			
Adjusted Beginning Balance				
Ending Balance/Net Position, June 30		(\$1,308,607)	(\$2,188,176)	(\$2,954,378)
Components of Ending Fund Balance				
Nonspendable	9710-9719			
Restricted	9740			

Description	Object Code	Adjusted Base Year 2025-26	Year 2 2026-27	Year 3 2027-28
Unassigned/Unappropriated		(\$1,552,633)	(\$2,552,120)	(\$3,440,673)
Reserve for Economic Uncertainties	9789			
Unassigned/Unappropriated Amount	9790			

Rounding used in calculations.

Sources: FCMAT, OCDE and charter school.

Recommendations

The charter school should:

1. Create an updated and detailed fiscal recovery plan as soon as possible, identifying by major object what specific reductions will be applied in what dollar amount, including a timeline for implementation, to eliminate the structural deficit and reach a minimum 5% reserve requirement.
2. Develop and adopt a budget and MYFP that eliminate deficit spending and meet reserve requirements in the budget and projection years to prevent fiscal insolvency.
3. Review available account balances before charging expenses, and do not charge expenses in excess of budget.
4. Review all budgeted expenditures and remove or reduce all one-time or nonessential expenditures.
5. Ensure that restricted funds are allocated correctly to all qualifying expenditures before expending unrestricted dollars.

Cash Management

A prudent level of budgetary reserves should be maintained for economic uncertainties and is needed to manage cash flow and help protect a charter school from unforeseen revenue shortfalls, unexpected costs, and economic uncertainties. Budgetary reserves also help a charter school save for large purchases and reduce the cost of borrowing money.

No required minimum reserve level was established in the charter school's memorandum of understanding (MOU) with OCDE. Explore Academy should, at a minimum, establish budgetary reserves based on average daily attendance (ADA) (5 CCR Section 15450). Information on budgetary reserves can be found in the Criteria and Standards for Fiscal Solvency on the CDE website at <https://www.cde.ca.gov/fi/ss/>. Below are the required budgetary reserve levels for school districts:

- the greater of 5% or \$88,000 for districts with 0-300 ADA
- the greater of 4% or \$88,000 for districts with 301-1,000 ADA
- 3% for districts with 1,001 to 30,000 ADA
- 2% for districts with 30,001 to 250,000 ADA
- 1% for districts with 250,001 and over ADA

The minimum recommended reserve required for a charter school with 0-300 ADA is 5% of general fund expenses and transfers out, which for Explore is \$117,852. FCMAT's MYFP for 2025-26 and the two subsequent years reflects a (\$1,308,607) ending fund balance in 2025-26. To reach its 5% minimum reserve, the charter school must make \$1,426,459 in reductions. Additionally, as is mentioned later in the Expenditure Reductions and Spending Controls sections of this report, appropriate controls need to be implemented and enforced. During interviews, staff shared that there are no purchasing procedures and the charter school debit card can be used at any time. This practice has a negative effect on cash flow. The charter school needs to maintain adequate cash balances in the general fund to cover monthly operating expenses. The charter school should implement immediate expenditure reductions to avoid running out of cash.

The county office's notice of concern letter for 2024-25 second interim stated that the cash flow projections received from the charter school with its financial reports showed negative cash balance in February, with less than one day of cash on hand at the end of March and less than four days at the end of April. The county office required the charter school to submit a detailed fiscal stabilization plan identifying the steps it would take to ensure fiscal solvency, including how it would repay its "significant debt" as discussed in the debt services section of this report. OCDE also required the charter school to do a third interim report and cash flow.

The charter school responded and provided a fiscal stabilization plan. The plan relies on collaborating with its back-office providers to address financial concerns through strategic adjustments in enrollment, expenditure, revenue enhancements and debt management. Explore Academy stated in the plan that it "reduced enrollment projections, revenue enhancements were given," however, the projected ending fund balance remained negative. The charter school's third interim and fiscal stabilization plan projected positive cash; however, the MYFP still showed an unrestricted net position of (\$338,931), which didn't reflect any effort to ensure a positive ending fund balance.

The purpose of a cash flow projection is to project the timing of receipts and expenses so that an organization can understand its cash flow needs. The cash flow projection shows the charter school's liquidity and ability to meet its current payroll and other financial obligations. It is imperative for the charter school to monitor its cash regularly and complete monthly cash flow projections for the budget year and, at a minimum, one subsequent fiscal year, to ensure that it can meet its financial obligations. Cash is critical for operations; without sufficient cash, the charter school is effectively bankrupt.

Recommendation

The charter school should:

1. Monitor current year and subsequent year cash flow at least monthly and prepare accurate cash flow projections that extend at least 18 months into the future.

Indirect Costs and Administrative Costs

All programs have general management costs, commonly known as indirect costs; these typically include administrative activities such as accounting, budgeting, payroll preparation, personnel services, purchasing, and central data processing. An indirect cost rate gives charter schools an efficient and standard way to recover some general management costs from individual programs. The rates that can be charged to each program are established by the CDE for all LEAs in California. A charter school may claim up to its approved indirect cost rate unless a specific authority (e.g., legislation or regulation) limits the rate. Charging each program the maximum allowable rate allows a charter school to provide equitable indirect

cost charges across the organization, ensures all general management costs are adequately supported by the various programs, and allows the charter to understand the true cost of each program.

In reviewing the charter's MYFP for 2025-26 as well as prior year interim reports, it did not charge indirect costs to any programs. This causes a significant reduction in reimbursed expenses on behalf of the charter, and it understates the operating costs of the restricted programs. The charter could have collected approximately \$29,000 in indirect costs for the unrestricted general fund (some of this amount would have been offset by additional contributions to restricted programs).

Recommendation

The charter school should:

1. Charge each restricted resource and fund the full allowable indirect cost rate, even if this results in a contribution from the unrestricted general fund.

Expenditure Reductions

Staffing Formulas

The charter school has not established staffing formulas for administrative, certificated, or classified positions or set maximum class size limits. Establishing staffing ratios enables the charter school to align staffing with enrollment. It also allows administration to anticipate when new positions will be added and when an existing position will not be replaced. With the charter's current enrollment, it cannot afford nor can it sustain its staffing for the current and two subsequent years.

Recommendation

The charter school should:

1. Create and adopt staffing ratios for administrative, certificated and classified positions and adjust staffing as appropriate in alignment with enrollment and its developed staffing ratios.

Spending Controls

The charter school must make expenditure reductions to maintain fiscal solvency. The charter school has a fiscal policies and procedures manual; however, in interviews during fieldwork and in reviewing audio from board meetings, expenditures often exceed budgets or occur without a budget. The charter school debit card is used rather than any purchase order system, putting intense strain on cash flow and, as was shared in fieldwork interviews, has resulted in checks being returned when funds are insufficient to cover the expense. To control expenditures and ensure that the charter school does not exceed the board-approved budgets, proper purchasing procedures need to be created and enforced. Administration and staff should not be allowed to make purchases without following a purchasing procedure, and credit card use policies must be enforced. It would benefit the charter school to work with its back-office provider to develop a purchase order system for all expenditures, prohibit the processing of a purchase when the budget is insufficient to support the expenditure, and enforce limited use of credit cards.

Recommendation

The charter school should:

1. Create a purchase order system for all expenditures and prohibit the processing of purchases when the budget is insufficient.

Restricted Funds

The charter school needs to ensure that all restricted funds are allocated properly to all allowable expenditures and aligned with their respective plans before it expends unrestricted dollars. Restricted funds should always be spent in accordance with their respective program or funding guidelines. The charter school needs to file its LCAP federal addendum to receive its federal dollars; otherwise it will forfeit \$31,118 in 2025-26. Ensuring that all qualifying expenditures are coded to the correct restricted programs can free up unrestricted dollars that might otherwise have been used for a restricted purpose.

Recommendations

The charter school should:

1. Annually submit the LCAP federal addendum by the deadline to receive federal dollars.
2. Review unrestricted expenditures to see if allowable expenditures can utilize restricted dollars to relieve the unrestricted budget.

Business Services Operational Processes and Procedures

Budget Development

Budget development is a core responsibility of a charter school's governing board and leadership team. During this process, revenue and expenditure estimates are made based on student enrollment, ADA, projected program and operational costs, and anticipated state and federal funding. Staffing needs are reviewed, position control is updated, and resources are aligned with the positions and their respective duties. Budget development is guided by the charter school's Local Control and Accountability Plan (LCAP), which outlines student achievement goals and the strategic use of resources to meet those objectives. Budget development often begins as early as January of the preceding fiscal year. It is key to begin planning early to pull together, discuss and agree on all the projections and assumptions necessary to build the charter school's annual budget. Using a detailed budget development calendar is an effective way to inform board members and staff of their statutory and fiduciary responsibilities. This includes the adoption of an annual budget within the statutory timelines established by EC 47604.33. Additionally, once budgets are developed, posting budget documents on the charter school's website supports transparent business operations and aligns with EC 47604.1 and Senate Bill 126 requirements for open meeting (Brown Act) and open records (Public Records Act). Lastly, accurate and realistic enrollment and ADA and staffing projections and the assumptions behind the projections are paramount as they are the main source of a charter school's revenue and expenses.

The charter school is starting its fourth year of operations, having been authorized July 1, 2022. In the 2024-25 fiscal year, Explore Academy was able to open its doors to students for its first year of service since its authorization. The 2024-25 school year is its base year for actual student enrollment, ADA and staff to then use for budget development for the 2025-26 fiscal year. Currently, the charter school has one full-time executive director, one full-time campus supervisor, three part-time paraprofessionals, one full-time instructional assistant and seven full-time teachers. Additionally, the charter school has vacancies for one full-time office manager and one special education teacher/coordinator.

Explore has contracted with two back-office providers for its financial operations. The first provider contract commenced on July 1, 2022, before the arrival of students, to assist with establishing operations and opening classrooms for the 2024-25 school year. This provider offered support specific to finance such as budgeting throughout the annual budget cycle (budget adoption, first and second interim and unaudited actuals), financial statement reconciliation and cashflow projections, and presenting these reports to the board. Documents provided to FCMAT from the charter school authorizer, OCDE, show that during the charter school's July 23, 2024 board meeting, the back-office support provided the charter school with a budget calendar of compliance dates and reminders for the month of August. However, board minutes and agendas for the remainder of the fiscal year do not show any additional reminders from the back-office support on important dates and deadlines. Additionally, in the charter school's Fiscal Policy, on page 7 in "budgets" and page 8 in "reports," there is only mention of the charter school preparing the annual operating budget and first and second interim reports. There is no annual calendar that includes all relevant duties and dates (e.g., CALPADS reporting, principal apportionment, etc.) that would inform the staff and board of what is due throughout the fiscal year or of the budget development process. This lack of knowledge can lead to missing critical reporting/funding deadlines. As mentioned in the revenue section of this report, the charter school failed to submit its LCAP addendum for federal funding. Also, meetings with charter school parents and the community for input on the development of the LCAP and many other statutory deadlines throughout the fiscal year may have been missed.

In a letter provided to the charter school dated March 26, 2025, the back-office provider terminated the contract with Explore Academy effective April 25, 2025, during critical planning and development for budget adoption. The charter school entered into a contract for business management and accounting services with another back-office provider by April 10, 2025. In this same time period, during a special board meeting on March 11, 2025, the board acknowledged receipt of notice that the executive director would resign effective at the end of the fiscal year, June 30, 2025. The change of back-office providers and loss of the executive director at a critical time in the fiscal year left the charter school vulnerable to missing key steps in budget development and statutory deadlines.

The charter school lacks comprehensive written guidance for budget development and instead has relied heavily on its back-office provider. The lack of written guidance as well as turnover of back-office providers and executive directors leaves new staff and board directors struggling to understand what is due and when, who completes tasks, and how to comply with deadlines. This hinders operational efficiency and consistent budget development. The back-office provider and Explore Academy should work together to develop the budget and include dates in the budget calendar to meet with staff and teachers regarding the process.

It is best practice to provide a budget calendar to staff, the board, community and contracted service providers that details critical deadlines and reports due throughout the fiscal year. Effective budget development depends on clearly documented procedures that promote consistency, efficiency, and accountability.

The budget calendar should include key budget development tasks such as those listed below, additional deadlines and important budget planning meetings, the dates required for completion, and the staff member or contracted service responsible for each task. This will provide transparency to the families of the Explore community, and inform the board of its fiduciary responsibilities throughout the fiscal year:

- Student enrollment and attendance projections.
- LCFF calculations.
- Staffing projections.
- Position control updates.
- Budget planning with the back-office provider and governing board.
- LCAP preparation timelines.
- Community and board meetings for LCAP planning and preparation.
- Back-office provider and executive director budget meetings.
- Interim reporting tasks, deadlines, and board meetings.
- Attendance reporting deadlines.
- Auditor meetings and deadlines.
- Federal funding reporting deadlines.

The executive director works with the back office provider in developing information for the budget, including the following:

- Attendance projections.
- Revenue calculations.

- Budget and interim form preparation.
- LCAP financial reporting.
- Salary and benefit expenditure calculations.
- Multiyear general fund financial projections.
- Cash flow projections.
- Related board presentations.

After budget development is completed, the required reporting should be prepared for the adopted budget hearing and subsequent approval using the charter alternative form. The alternative form, cash flow, budget assumptions and explanation should be included in the board agenda materials and then posted on the charter school's website for the governing board and public to view prior to the budget adoption hearing. This allows the public and board to access the documents and then ask informed questions and propose changes to the budget at the hearing. Similar documents should be provided and posted to the charter school's website at each interim reporting period. This will give new and current families the ability to see where the charter school stands financially, what goals the board and charter school have for students through the dollars being spent, and what is being communicated to the board. It also promotes transparent business operations.

The charter school website contains recordings of only the following board meetings: September 24, October 1 and 22, and November 19, 2024. The board minutes and agendas are listed on the website, but any documents to be discussed or already discussed at the meetings, specifically budget documents, are not accessible. Nor are any prior year board meetings and documents archived for public viewing on the website. Charter school staff stated that if the public wants to view documents before or after a board meeting, they can submit a request to the school under the California Public Records Act (GC 7922.525 - 7922.545). EC 47604.1, enacted with Senate Bill 126 (Chapter 3, Statutes of 2019), requires that charter schools and those that manage charter schools comply with key state laws related to transparency. Specifically, this code requires compliance with the Brown Act (GC 54950 – 54963) for open meeting law, and the California Public Records Act. It is best practice to post on the charter school website each board meeting, its respective agenda and documents that correspond with informational and agenda items, specifically regarding budget development.

FCMAT reviewed the back-office provider's 2025-26 adopted budget documents, which were supplied by Explore Academy. The back-office provider submitted the charter alternative form multiyear projection and assumptions for approval along with its board presentation, which FCMAT received from OCDE. However, the back-office provider did not supply detailed explanations to accompany the assumptions presented to the board. FCMAT was given basic fiscal assumptions, such as COLAs, along with projections for staff, enrollment and ADA. No explanation or justification was included as to how the charter school arrived at its projections for the 2025-26 fiscal year. In charter school documents reviewed by FCMAT staff, the most recent fiscal report submitted to the board with actuals for ADA projection for 2024-25 was third interim. The third interim assumptions showed 93% ADA, with 95% ADA projected for the 2024-25 fiscal year and two subsequent years. Failing to justify the assumptions can lead to inaccurate projections and prevent the authorizer from properly validating the projections. All key assumptions and explanations used for each financial reporting period should be included in a narrative document with backup justification for projections, with all budget documentation clearly posted on the charter school website.

Reviewing historical, current and projected enrollment is a key component of budget development. Accurate enrollment projections are necessary to accurately project fiscal year revenue and the required two subsequent year budgets. In the documents provided to FCMAT, the 2025-26 budget development

assumptions included enrollment projections of 150 students for 2025-26 and 170 students for fiscal years 2026-27 and 2027-28. Board documents, minutes and transcripts provided by the charter school's authorizer show discussion about the charter school's financial position and the need to recruit more students to remain fiscally solvent. However, the budget was built on a projection of potentially recruited students rather than actual student enrollment packets. This leaves the charter school fiscally vulnerable as enrollment and ADA projections are the basis of its LCFF state funding. Interviews with the new executive director revealed that 150 students were projected to be enrolled, only 80 were enrolled. An email from the charter school's authorizer, OCDE, stated that enrollment on the first day of school was 73 students, which is 77 fewer students than projected. The fiscal effect of this is discussed and reflected in the multiyear financial projection FCMAT has included in this report.

Accurate enrollment projections are needed to staff classrooms, plan for cost-effective programs, and manage change. Enrollment and ADA directly affect LCFF revenue, which is the charter school's primary unrestricted funding source. The charter school did not provide documents to show how it arrived at its assumed enrollment projection and FCMAT was unable to identify the charter school's methodology for enrollment and attendance projections. The charter school's back-office support provided enrollment estimates by grade level for 2025-26 and used them to project enrollment for the subsequent years. The charter school back-office provider then applied a 95% yield rate for attendance projections, even though in 2024-25 its ADA to enrollment ratio was 93%. The best practice is to develop enrollment projections and attendance assumptions based on historical trends, adjusted as needed for other reasonable considerations specific to the charter school. For a charter school in its first year of operation, it is best practice to take the attendance rate for that first year and project enrollment conservatively. Enrollment figures and ADA yield rates not based on concrete assumptions provide an overly optimistic projection of the charter school's fiscal position. If the charter school spends its budget based on inflated revenues, it will run out of funds.

Enrollment projections are vital to help identify changes that may significantly affect a charter school's estimated revenue in the current and subsequent years of a projection. The charter school then uses enrollment information to hire or adjust staffing accordingly. Failure to identify potential reductions in revenue based on declines in ADA and to plan for necessary staffing and other reductions in a timely manner can be a significant detriment to a charter school's financial position. Accurate staffing projections during budget development provide information essential for determining instructional priorities, staffing ratios and grade level configurations, and cannot be overlooked.

Budget development assumptions showed that the charter school based its budget on seven teachers for 150 students, or one teacher for approximately 21 students. It was shared in fieldwork interviews that 85 students were anticipated but 80 had officially enrolled. Although a goal to have smaller classroom sizes per teacher was discussed during the January 28, 2024 board meeting, no teacher-to-student ratio was officially set. In reviewing board policies, the charter's mission and vision, and the fiscal and employee handbook, FCMAT found no evidence that the charter school has an official teacher-to-student ratio to use as an assumption for budget development. The lack of a staffing ratio to use in enrollment projections gives the charter school no clarity on how many full-time equivalent (FTE) to hire. It is best practice to review projected and budgeted staffing with the back-office provider prior to onboarding additional FTE.

Recommendations

The charter school should:

1. Develop and use a budget calendar that includes all dates for statutory deadlines and other budget development tasks, including the individual responsible for each task, so that the executive director, governing board, back-office provider and staff are aware of deadlines and their respective responsibilities.

2. Develop and implement a process to ensure that the executive director and staff are involved in and partner with the back-office provider in budget development and do not solely rely on the back-office provider to build and complete each fiscal task.
3. Provide and explain all key assumptions used at each financial reporting period in a narrative document for the governing board and charter school authorizers.
4. Post prior and current board agendas, specifically approved budgets and their corresponding documents on the charter school website.
5. Develop and adhere to a teacher-to-student ratio that is in line with the governing board's mission and vision for the charter school.

Budget Monitoring

Charter school budgets change throughout the year. Estimated revenues, expenses and ending balances can fluctuate with changes in state budget projections, enrollment and attendance, personnel and operational needs. Budgets need to be monitored regularly during the fiscal year to ensure appropriations are not overspent, revenues remain appropriately projected, and actual expenditures are not materially different from those budgeted.

Regular financial reporting and timely budget revisions are essential components of budget monitoring. Reporting and monitoring are conducted during the fiscal year as additional information develops and the charter school's needs change. Budget revisions are necessary when there are increases and decreases in estimated income and expenditures and when closing the prior fiscal year books, budgeting carryover balances from prior years.

The budget adoption and revision process goes to the charter school governing board for approval during dates established in Education Code:

- July 1 – Each charter school shall submit a preliminary budget to its chartering authority – EC 47604.33(a)(1).
- December 15 – First interim reporting for period ending October 31 is due to the chartering authority and county office of education (COE) – EC 47604.33(a)(3).
- March 15 – Second interim reporting for period ending January 31 is due to the chartering authority and COE – EC 47604.33(a)(4).
- June 1 – Third interim reporting for period ending April 30 is due to the chartering authority and COE if the charter school is certified as qualified or negative at second interim and is requested by the chartering authority.

The first step in monitoring the charter school budget is reviewing its budget monthly. By reviewing the budget to actuals spent, the charter school can determine what adjustments need to be made throughout the fiscal year. The next step in budget monitoring is meeting the statutory deadline for review and approval of interim budget reporting and providing a multiyear financial projection during each reporting period. The budget is reviewed and analyzed to align with changes and presented to the governing board to approve. It is then submitted to its authorizer and the COE for review. This enables the charter school to view its financials from certain moments in time in comparison to the most recently board approved budget and monitor its fiscal condition. Should there be budget revisions that need to be made to align the budget to how school opened, operational and staffing changes and any changes in the governor's budget

that were adopted after the charter school approved its budget, the charter school should make continual budget revisions, and at the very least during the first interim period of review and revisions.

The 2024-25 board meeting calendar provided by the charter school authorizer shows a board meeting was scheduled for December 17, 2024. However, the board agendas provided by OCDE show no meeting in December. The next time the board met was on January 28, 2025. The first interim budget was listed on the January 28 agenda as an informational item, not as an action item to approve. Staff noted in interviews that they met regularly with the back-office provider to review budget to actuals. Reviewing and approving budgets during the annual fiscal cycle keeps the charter school in compliance with statutory deadlines as detailed above. Failure to approve budgets by their statutory deadline leaves the charter school out of compliance with its fiduciary responsibility and at fiscal risk for not taking timely action to monitor and revise its budgets. FCMAT's Charter School Accounting and Best Practices Manual states on page 35:

Each budget line-item should be accompanied by a detailed narrative of how each amount was determined. These explanations should include calculations, assumptions, and other metrics that demonstrate how the budgeted amounts were calculated.

After the budget is consolidated and balanced, the charter school executive director or designee should review the documents in detail before presenting to the governing board for final approval and subsequent submission to the chartering authority.

Explore Academy presented the board with budget updates on October 22, November 19, and February 25, and with the first interim budget on January 28, 2025, and the second interim budget on March 25, 2025. The due date to adopt and submit second interim is March 15. Explore Academy was late in presenting and submitting both its first and second interim budgets. During these presentations, the charter school projected combined unrestricted and restricted negative ending fund balances in the current and two subsequent years: (\$539,404) as of second interim, a (\$455,847) ending fund balance in 2025-26 and a (\$436,247) ending fund balance in 2026-27, respectively.

After the charter school's submission of its second interim budget was reviewed by OCDE, the county office submitted a Notice of Concern dated April 14, 2025, regarding the fiscal condition of Explore Academy and requested the charter school provide a fiscal stabilization plan and third interim. Their concerns included inaccurate financial reporting, overstated enrollment projections and financial estimates, deficit spending, reserves and cash flow projections and significant debt. OCDE further stated that failure to comply could result in a violation. On May 19, Explore Academy provided a detailed response to the authorizer's April 14 notice. In its response was a fiscal stabilization plan and third interim report. Although the charter school notes cost savings and updates to its revenue projections in the stabilization plan, the third interim budget still reflects a negative ending fund balance for the current and subsequent fiscal years and enrollment projections at facility capacity. This is further detailed in a second notice of concern regarding the fiscal condition of Explore Academy dated June 11, 2025. Explore Academy needs to make budget revisions as part of its budget monitoring process. Receiving notice from its authorizer shows Explore Academy has not been monitoring its budget, nor is it making revisions and decisions to project a budget that is aligned with its reality.

Shortly after the third interim was presented to the board on May 13, 2025, the proposed 2025-26 budget was brought to the board for review and adoption on June 24, 2025. In a review of the board agenda, the budget was not a public hearing item under after the Local Control and Accountability Plan (LCAP) public hearing; it was only listed as an action item for approval. According to EC 47606.5 and 47604.33, charter schools are required to hold a public hearing for family and community input before adopting the LCAP. Although California Education Code does not require the budget to be presented in a hearing to the board

like the LCAP, as stated in the FCMAT's California Charter School Accounting and Best Practices Manual on page 36, it is best practice:

The LCAP must be submitted to the chartering authority and the county superintendent of schools (or only the county superintendent of schools if the county board of education is the chartering authority) by July 1 of each year pursuant to Education Code Section 47604.33. Charter schools must hold a public hearing to solicit recommendations and comments on the LCAP, followed by a subsequent public meeting for the plan's adoption. As with other statutory reporting requirements, the chartering authority's responsibility is not to approve the LCAP, but to ensure that the charter school has complied with all LCAP reporting requirements, including providing for an adopted budget that includes the expenditures necessary to implement the school's LCAP.

As part of the charter school's LCAP process, it is best practice to be transparent and present the LCAP and proposed adopted budget in a public hearing to solicit recommendations and comments prior to taking action to approve. This provides the board with the opportunity to give input on the budget it will be monitoring for the fiscal year.

As discussed in the Budget Development and Position Control sections of this report and detailed as an area of concern from the charter school's authorizer in the second notice of concern dated June 11, 2025, the staffing and enrollment projections are areas of fiscal concern that have not been monitored. As presented to the board during its June 24, 2025 board meeting, the assumption used for staff was seven teachers, one administrator, two pupil support staff, three classified support staff and one office clerical staff for its proposed adopted budget and subsequent two years. Actual staff hired as of September 18, 2025: seven teachers, one administrator, one full-time campus monitor/after school coordinator, three part-time paraprofessionals and one full-time instructional assistant. Additionally, per EDJOIN, there are two vacancies: one full time special ed teacher/coordinator and one full-time office manager. The teacher/coordinator vacancy reflects one additional FTE from what was projected, equaling eight teachers total. The enrollment projection used was 150 students for the proposed 2025-26 year, and 170 students for the two subsequent years. The charter school's actual enrollment as of the first day of school was 73 students. This is a difference of 77 students. The fiscal effect of this will be addressed in the Multiyear Financial Projection section. However, as part of budget monitoring best practices, the charter school should prepare a revised budget for the governing board to approve prior to first interim that reflects a more realistic picture of its financial position given its enrollment. FCMAT's California Charter School Accounting and Best Practices Manual states on page 39:

Since a budget is a point-in-time projection based on assumptions available at the time of development, charter schools will need to periodically make budget changes. At a minimum, budget revisions should be made during the interim financial reporting process, and as necessary, at other times throughout the fiscal year. Specifically, the first and second interim reports due to the charter authorizer in December and March respectively should reflect revised projected revenue and expenditure totals. In addition, depending on the timing of the state's adoption of the annual budget act, and the changes with the start of the school year, **charter schools should consider preparing a revised budget for governing board approval in the fall (i.e., in September or October) to reflect adjustments relating to state funding, enrollment, and other needs.**

[Emphasis added by FCMAT]

Increasing enrollment from 73 students in the current year to 170 in the two subsequent years, as projected in the 2025 adopted budget, may not realistically reflect the charter school's ability to recruit and retain students. Enrollment is the basis of its main state funding source and incorrect projections can detrimen-

tally affect the charter school's budget. It is critical for the charter school to re-evaluate its enrollment and project conservative increases based on reasonable assumptions.

Recommendations

The charter school should:

1. Submit budgets by the statutory deadlines as set by Education Code.
2. Prepare and revise the budget at a minimum during the interim budget reporting periods if not earlier.
3. Promote transparency by presenting the LCAP and proposed adopted budget in a public hearing to solicit recommendations and comments prior to taking board action to approve.
4. Re-evaluate its enrollment and project conservative enrollment increases at a minimum during the interim budget reporting periods.

Position Control

It is critical to maintain an effective position control system to manage the cost of salaries and benefits and to properly show those expenditures in the charter school's budget. Accurately projecting salary and benefit costs is vital for fiscal stability.

In a larger charter school or district, an effective position control system will fully integrate with payroll and budget modules, facilitate the hiring and monitoring of staff, and be used to update the budget at each reporting period. When one system is used, staff time and duplication of effort is reduced, and information can be produced on time. Maintaining accurate data is essential for budget development and monitoring throughout the year to provide effectiveness and continuity of services. All reconciliation of data needs to include SACS coding so that in reviewing budgets, the charter school can verify the funding source of the position and, when required, run financial statements that reflect the true cost of a restricted grant program for accurate grant reporting. In the case of a smaller charter school like Explore Academy, knowing about position control and how to build it out as the charter school grows is foundationally important to maintain its fiscal health.

Building a position control foundation begins with board-approved staffing ratios based on school needs, any directive from the board on its teacher-to-student ratio goals and any legal requirements. Ratios to consider are administrators to staff and student enrollment, student to teacher, and classified support staff and student ratios. Once the number of positions based on the corresponding ratio has been established, administration can determine the number of employees who hold the correct credentials and qualifications for the determined positions and proceed with hiring as needed. This allows time to review and ensure the correct program and budget is aligned with the positions. As the organization grows, new positions can be created to fill the need according to the ratios set by the board and are only onboarded if approved by the board and funds allow. As part of the approval process, the fiscal impact of the new or replacement position needs to be communicated and the funding source for the position included.

As mentioned in the Budget Development section of this report, in a board meeting on January 28, 2025, a future goal of the board is to have smaller classroom sizes per teacher. To achieve this goal, the board needs to set the staffing ratios. If a low ratio is established, this could strain the budget and keep the charter school in a precarious financial position. Analysis of revenues to teacher salary and benefit costs needs to be part of the development of a staffing ratio the charter school can afford. The lack of staff ratios has already had a negative effect. As of September 4, 2025, according to EDJOIN, the charter school

is hiring one additional FTE – a special education teacher/coordinator, increasing teacher FTE to 8. Not having staffing ratios has led the charter school to hire one more FTE than it had projected in its adopted budget. The average cost of a teacher based on the charter school's 2025-26 salary schedule is \$75,776. The charter school is already in fiscal distress as discussed in the Budget Monitoring section of this report. This budget was based on 150 students enrolled, with a student-to-teacher ratio of 21.4 to 1. However, the charter school's authorizer shared that as of the school start date there were only 73 students, not the projected 150 students. That leaves the charter school with a potential student-to-staff ratio of 9.12 students to 1 teacher. The lack of position control and staffing ratio has left the charter school with positions that are not needed based on enrollment. The fiscal impact of this is discussed in the Multiyear Financial Projection sections of this report.

Recommendations

The charter school should:

1. Ensure that all new and existing positions included in the budget are approved by the governing board and the board is aware of each position's funding source and its fiscal impact on the budget.
2. Create and adopt staffing ratios for administrative, certificated and classified positions and adjust staffing as appropriate to align with enrollment.
3. Create and maintain a position control system that includes all board-approved positions, with salary and benefit costs and account code.
4. Audit and reconcile staffing ratios to ensure they account for all board-approved positions, including salary and benefit costs, in the position control system.

Payroll

Explore Academy outsources payroll processing to Paycom, a third-party payroll service provider. Employees are paid twice monthly, on the 10th and 25th of each month worked.

During interviews, staff reported that Paycom automates several key functions, including:

- Submission of employee withholding information.
- Preparation, authorization, and submission of absence authorization and verification forms.

Employees are responsible for logging their own time into the Paycom system. The executive director/principal reviews and approves time entries. Once verified, payroll data is transmitted from Paycom to Charter Impact (the back-office provider) for integration into the school's financial records.

Staff also indicated that a comprehensive spreadsheet is used to track payroll-related items; however, this spreadsheet was not provided to FCMAT for review.

Recommendation

The charter school should:

1. Reconcile payroll monthly with position control to ensure that only authorized employees are paid.

Accounts Payable

Accounts payable work includes accurately tracking amounts owed to vendors, ensuring vendor payments are properly approved, and processing timely payments to vendors. The accounts payable process originates when a purchase is made to obtain supplies or services from a vendor. Because of the nature and volume of work, purchasing and accounts payable functions are at high risk for errors and fraud. Effective purchasing and accounts payable processes and procedures include activities to ensure that all expenditures are approved based on available budgeted resources and that only legitimate and accurate invoices are authorized and paid.

Charter schools may use purchase requisitions and/or purchase orders to initiate purchases from vendors. A purchase requisition is most commonly used to start a request and complete an approval process to make a purchase. Purchase orders are used to communicate the order to the vendor. The charter school's board approved the Explore Academy Fiscal Policies and Procedures Manual dated July 29, 2025, which contains purchasing controls and procedures that allow the executive director to approve purchases, invoices and employee reimbursements up to \$15,000. For transactions over \$15,000, the approval of the board president or board treasurer is required. While the procedures in the manual reference purchase orders in the verification process for invoices, the charter school does not currently utilize purchase requisitions or purchase orders to initiate purchases of materials, supplies and services from vendors.

The use of either paper form or electronic form purchase requisitions and an internal approval process to initiate the purchase of materials, supplies, and services would tighten budget and cash controls for the school. Following is an example of an approval workflow:

- Teacher requests classroom supplies (requestor).
- Office manager determines if there is adequate budget and available resources for requested supplies (budget approver).
- Executive director assesses if requested supplies are allowable with funding source and in compliance with the educational program (final approver).

After final approval of the purchase requisition, a purchase order may be issued to the vendor for the classroom supplies. Without these procedures established, there is risk that unauthorized purchases may be made that obligate the school and/or exceed the budget and available cash resources.

A purchasing process that uses a purchase order system integrated with the financial system is the best practice because such systems automatically encumber the charter school's budget when a purchase order is approved. Budget encumbrances are essential to managing and monitoring the budget. The charter school does not have an integrated system, so purchasing obligations should be carefully monitored and tracked against the most current budget to determine funds available for future uses.

As discussed in the Expenditure Reductions section of this report, Explore Academy uses a debit card instead of a purchase order system, resulting in weak expenditure controls and strain on cash resources. To improve internal controls on purchasing, the charter should implement a purchase order system, strengthen existing credit and debit card policies, and prohibit purchases that exceed available budget.

The charter school utilizes the services of a back-office provider to record accounts payable transactions and issue checks to vendors. During FCMAT's interviews, charter school staff reported that all invoices are directed to the office manager who then uploads approved invoices and associated backup supporting documentation into ShareFile, the back-office service provider's file sharing system. The back-office service provider enters this information into its financial system, Sage, and issues payments directly to vendors. Prior to issuing payments, the back-office service provider consults with the charter school to ensure there is sufficient cash available. It is important to retain supporting backup documentation for invoices so that evidence exists to legitimately verify goods and services received by the charter school. Interviews with the current back-office service provider revealed that several accounts payable transactions during the past few months are lacking back-up documentation. They check in weekly with the charter school to request and obtain any missing documentation and acknowledge that the recent staffing transitions at the charter school have made it challenging for the new staff to locate missing documentation.

Timely invoice payment is critical for maintaining healthy vendor relationships. Charter school staff reported that the school has had difficulty meeting invoice remittance due dates as a result of insufficient cash availability to disburse payments. Further, they reported that charter school staff prioritize the issuance of checks if there is not enough cash available to pay all outstanding invoices. Not issuing payments in a timely manner puts the school at risk of the cancellation of services and a downgrade in its credit rating.

Recommendations

The charter school should:

1. Establish the use of purchase requisitions with an internal workflow approval process.
2. Strengthen current credit and debit card policies.
3. Monitor and track purchasing obligations made against the most current budget to determine funds available for future uses.
4. Develop a system to file and maintain backup documentation to support invoice processing.
5. Update and monitor cashflow projections to account for the projected timing of payments for goods and services to ensure adequate cash is available to pay invoices timely.
6. Make plans for short-term cash borrowings well in advance of projected cash shortfalls to ensure operational continuity.

Accounts Receivable

The accounts receivable function manages the collection of payments made or owed to the charter school, including donations and revenue from other local sources. Basic activities include depositing funds, recording revenue, reconciling cash accounts, managing accruals, and tracking payment schedules for federal, state, and local funding. Effective accounts receivable procedures are essential to protect charter school assets, prevent fraud, and ensure accurate financial reporting.

The school uses a back-office service provider for recording accounts receivable transactions. At the time of interviews, the school's newly hired office manager had not yet started working in the role. As a result, the accounts receivable procedures described by the executive director were generalized since she began work in her role a month prior and not yet had the opportunity to perform the procedures herself. No manuals or other documentation is available to help the staff perform their duties accurately and efficiently.

This increases the risk of processing errors, inefficiencies and service disruptions, particularly during staff absences or transitions.

As described in interviews, when the school receives checks for items such as donations, payments and fundraisers, the office manager issues a receipt to the donor/payor. Fundraising activity and receipts are logged individually by event. Deposits are counted by the office manager and the executive director; the deposit is prepared and submitted to the school's local bank by the executive director; and a copy of the deposit slip and check(s) is uploaded to ShareFile for the back-office service provider to record in the financial system. The executive director receives the bank statements each month and forwards them to the back-office service provider for reconciliation; however, FCMAT was not provided with copies of bank statements and reconciliation reports to verify this.

The Orange County Department of Education's 2024-25 Charter School Annual Oversight Report includes a recommendation for the school to update its cash management policy to include procedures related to cash receipts for the following:

- Issuance of prenumbered receipts for all cash, cashier's checks, and money orders received.
- Reconciliation of receipts to the deposit.
- Maintenance of an audit trail to ensure the deposit of all monies.
- Description of how cash is securely stored and how often deposits are to be made.
- Description of how many employees count cash and what documentation is signed to certify amounts.
- Description of how duties are segregated for the receipt of monies, deposit of funds, and reconciliation of bank statements.

The Explore Academy Fiscal Policies and Procedures Manual dated July 29, 2025, lacks a procedure for utilizing prenumbered receipts for all cash, cashier's checks and money order receipts, though staff interviewed said a receipt is issued to the donor when a check is received. Also, the manual lacks a procedure for the handling of cash receipts such as how many employees should count cash and certify amounts through documentation and signatures. The manual does, however, define procedures for the receipt of checks. FCMAT reviewed the school's 2024-25 general ledger and observed that the school received Zelle payments from donors that are deposited directly in the school's bank account. The process for how these transactions are recorded is unclear and is not included in the policies and procedures manual. Improved and detailed operational procedures are needed for cash receipts and electronic receipts from sources such as Zelle to reduce the potential for errors and fraud, and to ensure proper accounting coding of the revenue. The executive director should maintain close oversight of these functions to ensure charter school assets are protected.

Recommendations

The charter school should:

1. Update procedures in the Explore Academy Fiscal Policies and Procedures Manual to include the use of prenumbered receipts for all cash, cashier's checks and money orders, and cash counting procedures.
2. Update the Fiscal Policies and Procedures Manual to include accounting and reconciliation procedures for Zelle and other electronic receipts.

Contracted Services

Small independent charter schools frequently use the services of independent contractors for many necessary business management and operations functions and for specialized academic services because they typically are not large enough to support these services in-house. Charter schools are exempt from many state statutes and regulations; however, EC 47604.1 requires that charter schools comply with Government Code (GC) 1090, which prohibits public officials and employees from having a financial interest in contracts they make or participate in; and with the Political Reform Act of 1974, which includes provisions concerning conflicts of interest in governmental decision-making. For fiscal year 2025-26, FCMAT projected contracted services expenditures to be \$644,955, comprising approximately 27% of Explore Academy's total projected expenditures.

In addition to these regulations pertaining to contracting, the charter school's Fiscal Policies and Procedures Manual dated July 29, 2025 states:

Purchases, Contracts or Agreements that exceed \$15,000, require Board approval. The Executive Director shall review and consider only written proposals/contracts/agreements from vendors. Terms may only be presented in writing. Contracts/Agreements in excess of \$15,000 require a detailed proposal be presented to the Board of Directors. Contracts/Agreements for services require such proposal be presented by the Vendor.

Further, the Bids Policy and Procedure included in the manual states, in part:

The school shall purchase equipment, supplies, and services using competitive bidding when required by law and in accordance with board policy. In those circumstances where the law or board policy does not require competitive bidding, the Board of Directors may request that a contract be competitively bid if the Board determines that it is in the best interest of the school to do so.

1. School shall seek competitive bids for contracts involving an expenditure of \$15,000 or more for a school construction project.
2. "School construction project" includes construction, reconstruction, erection, alteration, renovation, improvement, painting, repainting, demolition, and repair work involving a school owned, leased, or operated facility.
3. Competitive bids shall be sought for contracts exceeding \$15,000 for the following:
 - i. The purchase of equipment, material, or supplies to be furnished, sold, or leased to the school.
 - ii. Services, not including construction services, or special services and advice such as accounting, financial, legal, or administrative matters.
 - iii. Repairs, including maintenance, that is not a public project.

Even if not required by law or the charter school's policies, it is best practice to solicit at least three proposals, if possible, when procuring services. Requests for proposals for obtaining equipment, materials, supplies and services should communicate to vendors detailed specifications and criteria defined by the charter school for what they expect to receive. Any contract/agreement between the charter school and a vendor should include a description of the service to be performed or goods to be delivered, the pricing for the service or goods which may include a "not to exceed" amount, and the start and end date of the contract. A contract must be fully executed for it to be valid and enforceable. Fully executed is defined as

the point at which a contract is signed and dated by each of the authorized parties to form a legally binding contractual relationship.

FCMAT was provided with and reviewed several contracts for special services and advice exceeding \$15,000 between the charter school and various vendors, including the following, totaling approximately \$520,000 for the 2025-26 fiscal year:

Table 13: Sample vendor contracts – 2025-2026

Vendor	Description	Amount
Revolution Foods	Food services	\$112,000
Charter Impact	Business management, payroll, and student data services	\$99,300
TrueNorth Education Services, LLC	Administrative and education management	\$62,068
AllyOp	Staff professional development/mentoring	\$56,000
Service Providers	Special education compliance and management support	\$45,000
Cross Country	Substitute special education service providers	\$39,000
Norma Alvarado	After school program coordinator	\$25,688
TechLab	Information technology support	\$22,604
Norma Alvarado	Campus site support/monitor	\$20,254

Sources: charter school.

During the review, FCMAT observed that none of the contracts provided for review and listed in the table above were fully executed by signatures of both the vendor and the authorized signer of the charter school.

The charter school entered into a service agreement with TrueNorth Education Services, LLC (TrueNorth) on November 19, 2024. The agreement was recently amended on July 29, 2025. TrueNorth supports the school with the following administrative functions:

- Human resources
- Strategic planning and growth
- Marketing and PR
- Curriculum and instruction
- California Department of Education reporting/compliance
- Facilities
- Resource management
- Risk management

Interviewees indicated that in spring 2025, TrueNorth procured another service provider for the school, Charter Impact. Charter Impact is the current back-office financial services and student information services provider as of May 1, 2025. TrueNorth led the process at the direction of the charter school's board of directors and solicited five potential vendors with Requests for Proposals (RFP) in accordance with the Fiscal Policies and Procedures adopted by the board. FCMAT was provided with the executive summary prepared for the board by TrueNorth, which describes the evaluation process, vendor responses to primary evaluation questions, and costs for two of the five vendors – Charter Impact and DMS. At the board meet-

ing prior to the approval of the Charter Impact service agreement, the charter school's executive director asked a series of questions that should have occurred during the vendor evaluation process; however, the executive director was not included in the procurement process. The executive summary provided to FCMAT and to the board by TrueNorth contained a recommendation to select Charter Impact: "TrueNorth highly recommends Charter Impact to replace ICON, the current Back Office provider and to begin work on May 1, 2025." On April 10, 2025, the board took action to approve a service agreement with Charter Impact effective May 1, 2025.

The California Fair Political Practices Commission (FPPC) regulates independent contractors under state conflict-of-interest laws when they are hired by public agencies. The charter school should be involved in identifying consultants that will participate in making governmental decisions on its behalf. If an independent contractor participates in governmental decision-making by recommending a service provider such as in the example provided in the previous paragraph, the charter school should evaluate whether it should complete California Form 805, Agency Report of: Consultants, or any other applicable disclosures.

FCMAT reviewed the charter school's check register dating from 07/20/2022 – 06/10/2025. During that period, several payments were issued to individuals and businesses for student enrollment recruitment services totaling more than \$90,000. In addition, payments of \$20,000 were issued to an individual for facilities improvements. Purchases exceeding \$15,000 require board approval per the charter school's Fiscal Policies and Procedures. FCMAT was not provided with evidence of board approval or executed contracts for recruitment or facilities improvements services to determine the terms and conditions of the services rendered to the charter school. While each individual payment did not exceed \$15,000, given the impact to the charter school budget of the cumulative payments, and to protect the best interests of the charter school, the best practice is to develop and execute contracts for services that will exceed the \$15,000 threshold.

Independent Contractors Versus Employees

During fieldwork and document review, FCMAT noted that Explore Academy has entered into a contract with a campus site support/monitor for 2025-26. Explore Academy also has an employee with a substantially similar title, campus monitor/after school support. Misclassifying employees as independent contractors can lead to significant penalties for employers. Both the Internal Revenue Service and the California Department of Industrial Relations have specific guidelines and tests to determine the appropriate classification for employees and independent contractors. The charter school should evaluate the duties of both individuals and whether they have been appropriately classified as an employee and/or as an independent contractor.

Recommendations

The charter school should:

1. Develop a system to ensure that all charter school contracts are fully executed, maintained, and filed for record-keeping purposes.
2. Evaluate whether independent contractors will participate in the charter school's decision-making by conducting procurement processes and recommendations for the board, and ensure the proper disclosure forms are completed by the independent contractor(s).

3. Ensure special services such as student recruitment service and facilities improvements service contracts are executed between the charter school and the vendor memorializing the description of the service to be performed or goods to be delivered, the pricing for the service or goods which may include a “not to exceed” amount, and the start and end date of the contract as well as any other clauses that protect and indemnify the charter school.
4. Evaluate the duties performed under the contract for campus site support/monitor and the duties performed by the employee who is the campus monitor/after school support and whether each has been appropriately classified as an employee or an independent contractor.

Human Resources

As a small charter school, Explore Academy has minimal administrative staffing. Most human resources duties are performed by a third party, TrueNorth.

Hiring

TrueNorth primarily advertises teaching positions through EDJOIN. While other advertising platforms were mentioned during interviews, specific names and examples were not provided to FCMAT.

Interviews conducted with both Explore Academy and TrueNorth revealed that TrueNorth is responsible for reviewing all applications to ensure candidates meet job requirements. This includes credential verification and reference checks. Candidates who meet the criteria are then recommended to the executive director for final interviews and hiring decisions. In the most recent hiring cycle, TrueNorth conducted all interviews independently, without participation from Explore Academy staff or board directors.

FCMAT received conflicting information regarding the interview process for prospective employees. During an interview with TrueNorth on August 26, 2025, representatives stated that they conducted teacher interviews on behalf of Explore Academy, with no involvement from Explore Academy staff or board members. However, an excerpt from an email dated February 7 from TrueNorth to the OCDE states they do not participate in interviews:

1. What role does TrueNorth play in managing the recruitment process? We will mostly play a logistics role in supporting the school through the interview process. We will work with the school to develop job descriptions, developing salary bands competitive with area schools which are approved by the Board members. When asked to do so, we will post job listings (e.g., EdJoin) and help them review applications if requested to do so. The school will determine positions it needs and we will work with them to put their needs into job postings.
2. Does TrueNorth participate in interviews? We will help with initial screening and verifying resume credentials, complete application packets received from interested job candidates. The Principal/Executive Director will interview and make choices. We will provide our evaluations of candidates if that is requested. **We do not anticipate participating in the actual interviews.**
3. Does TrueNorth participate in any procuring contracts? No

[Emphasis added by FCMAT]

While the board of directors may delegate recruitment, selection and hiring responsibilities, it must retain ultimate authority over employment decisions. If staff or board members are not directly involved in the recruitment and selection process, the board should still receive formal hiring recommendations and be responsible for approving and appointing employees.

Recommendations

The charter school should:

1. Ensure that third party organizations are following the directions of the charter school in hiring processes and all state and federal regulations.
2. Report all employees hired by the executive director to the board as an information item.

3. Have the board of directors approve all newly hired employees as best practice.

Onboarding

The contract with TrueNorth indicates they will “support the executive director in the following: develop an employee onboarding program.” TrueNorth connects employees with Charter Safe, Explore’s JPA for liability insurance, for mandated training and sends pay information to Charter Impact. According to staff interviews, new employees upload their information to Paycom but school staff must do DOJ clearances, employment eligibility verification and follow-up on outstanding documents.

The charter school has an onboarding checklist that it has used inconsistently. To ensure Explore Academy remains in compliance, it should consistently use this checklist to track the completion of onboarding requirements. The checklist should be reviewed and updated annually for any necessary changes.

Recommendations

The charter school should:

1. Consistently use the onboarding checklist to track the completion of onboarding requirements.
2. Review and update the checklist annually for any necessary changes.

Exit Interviews

Exit interviews are a valuable tool to gather feedback for an organization. This feedback can improve workplace culture, processes and policies, and reduce turnover. Based on interviews and a review of personnel files, Explore Academy does not conduct exit interviews when employees separate from the school.

Recommendation

The charter school should:

1. Consider conducting and documenting exit interviews with separating employees.

Employee Evaluations

Although Explore Academy is not subject to EC 44664, the school’s approved material revision addresses employee evaluations within Element F: Employee Qualifications, as required by EC 47605.6(b)(5)(F). This section outlines “the qualifications to be met by individuals to be employed by the school,” and includes job descriptions that specify evaluation responsibilities.

For example, the principal’s job description includes:

- Leading instructional staff to achieve high performance through goal setting, feedback, and evaluation.
- Monitoring instructional planning and implementation.
- Reviewing instructional and planning documents.
- Conducting formal and informal classroom observations and maintaining written records with recommendations.

- Performing regular evaluations of instructional staff, including annual performance reviews.

Employee evaluations are a critical tool for assessing individual performance and enhancing organizational effectiveness. They provide a structured opportunity for employees and supervisors to:

- Review job performance.
- Recognize achievements.
- Identify areas for growth and improvement.
- Communicate support needs, such as training or resources.

A consistent evaluation process fosters professional development, aligns individual goals with organizational objectives, and supports strategic staffing decisions. It also promotes accountability, improves communication between staff and leadership, and contributes to employee motivation and job satisfaction.

Explore Academy outlines its evaluation procedures in both its Employee Handbook (Page 47) and employment contracts for teachers. According to these documents:

- Performance reviews are to be conducted periodically by the employee's immediate supervisor.
- The frequency of evaluations may vary based on factors such as job position, tenure, performance history, and changes in duties.
- Evaluations assess areas including work quality and quantity, job knowledge, initiative, and interpersonal attitude.
- Employees are required to sign evaluation reports to acknowledge receipt and discussion, not to indicate agreement.
- New hires may have performance goals reviewed within the first 90 days.
- Teacher contracts specify at minimum annual evaluations, typically around the anniversary of employment.
- Salary increases and promotions are not tied to performance evaluations but are based on objective criteria such as years of experience.

Despite these stated policies, FCMAT found no evidence of consistent annual performance evaluations in personnel files. This discrepancy suggests a gap between policy and practice, which may impact accountability, employee development, and compliance with internal governance standards.

Recommendations

The charter school should:

1. Conduct evaluations as outlined both in its employee handbook and its employment contracts.
2. Have employees sign evaluations indicating acknowledgement of receipt.
3. Keep a copy of the evaluation in the employee's personnel file.

Training and Cross-training

As the school has been unable to secure a consistent office manager, FCMAT was unable to determine the level of training and cross training that occurred. No training plan or written processes and procedures are established for a new or substitute employee to follow.

Written processes and procedures ensure consistency and compliance as well as continuity during times of transition.

Recommendations

The charter school should:

1. Create written processes and procedures for new or substitute staff to follow.
2. Create a plan for training a new office manager.

Personnel File Management

Explore Academy has no board policy regarding personnel files. However, the employee handbook states, “At the time of employment, a personnel file is established for each employee. It is each employee’s responsibility to keep their Supervisor, Executive Director or Human Resources advised of changes that should be reflected in their personnel file. Such changes include change in address, telephone number, marital status, number of dependents and person(s) to notify in case of emergency.”

As a best practice, personnel files should also contain the following information:

- Completed personnel file checklist.
- Log of individuals accessing the file with dates.
- Employment application and resume.
- Offer letter/signed employment agreement (including salary, position title, and start date).
- Signed job description (match above).
- Emergency contact information.
- Proof of credential verification.
- Tuberculosis (TB) test clearance.
- Proof of required background check and clearance.
- Proof of required annual trainings (mandated reporter, sexual harassment prevention, etc.).
- Signed employee handbook acknowledgment (new signatures should be obtained when revised).
- Signed annual performance evaluations.
- Disciplinary records (if applicable).
- Leave of absence documentation (if applicable).
- Separation/exit interview documentation (when applicable).

The following items should not be stored in an employee's personnel file:

- Form I-9 - Employment Eligibility Verification.

Form I-9, and copies of any documents retained should be kept in a separate secured file with limited access. If the charter school keeps copies of documents proving employment eligibility, it should keep them for all employees to avoid claims of discrimination.

- The following should be kept in a payroll file for each employee:
 - Form W-4 - Employee Withholding Certificate (federal).
 - DE 4 - Employee's Withholding Allowance Certificate (California).
 - Health Benefits Enrollment Forms (if applicable).
 - Direct Deposit Authorization (if applicable).

FCMAT randomly chose six employee files from the 2024-25 fiscal year: four teachers and two classified employees and reviewed the personnel files that were available on site. While not part of the scope of this report, at the time of the FCMAT interviews, no personnel files were available for 2025-26.

Table 14: Results of personnel file review, 2024-25

Document	Certificated 1	Certificated 2	Certificated 3	Certificated 4	Classified 1	Classified 2
Completed personnel file checklist	Yes (partial)	Yes (partial)	Yes (partial)	No	No	No
Log of individuals accessing the file with dates	No	No	No	No	No	No
Employment application and resume	Yes	No (Resume only)	No (Resume only)	Yes	No	No
Offer letter/signed employment agreement (including salary, position title, and start date)	No	Yes	Yes	Yes	No	No
Signed job description (match above)	No	No	No	No	No	No
Emergency contact information	No	No	No	No	No	No
Proof of credential verification	No	No	Yes	yes	N/A	N/A
TB test clearance	No	No	No	Yes	No	Yes
Proof of required background check and clearance	No	No	Yes	No	No	No
Proof of required annual trainings (mandated reporter, sexual harassment prevention, etc.)	Yes (partial)	No	Yes	Yes	No	Yes

Document	Certificated 1	Certificated 2	Certificated 3	Certificated 4	Classified 1	Classified 2
Signed employee handbook acknowledgment (with new signatures obtained when revised)	No	No	No	No	No	No
Annual performance evaluations	No	No	Yes	Yes	No	No
Disciplinary records (if applicable) ¹						
Leave of absence documentation (if applicable) ₁						
Separation/exit interview documentation (when applicable) ¹						

¹Staff was unable to verify whether the absence of documentation for these items was because they were not applicable (disciplinary records, leave of absence documentation) or because documentation was not appropriately kept.

Sources: FCMAT and the charter school.

Three personnel files contained I-9 and copies of employee documents.

One personnel file contained a W-9 - Request for Taxpayer Identification Number and Certification, which is to be completed by vendors and independent contractors. Employees complete W-4 - Employee's Withholding Certificate. Neither form belongs in a personnel file.

One personnel file contained no position title or anything to indicate the position the employee holds/held.

Recommendations

The charter school should:

1. Create individual personnel files for each employee.
2. Ensure that each employee file includes the following:
 - Completed personnel file checklist.
 - Log of individuals accessing the file with dates.
 - Employment application and resume.
 - Offer letter/signed employment agreement (including salary, position title, and start date).
 - Signed job description (match above).
 - Emergency contact information.
 - Proof of credential verification.
 - TB test clearance.
 - Proof of required background check and clearance.

- Proof of required annual trainings (mandated reporter, sexual harassment prevention, etc.).
 - Signed employee handbook acknowledgment (with new signatures obtained when revised).
 - Signed annual performance evaluations.
 - Disciplinary records (if applicable).
 - Leave of absence documentation (if applicable).
 - Separation/exit interview documentation (when applicable).
3. Create a separate file for employment eligibility information. If copies of documents proving eligibility are kept, they should be kept for all employees.
 4. Create a separate payroll file for each employee that contains withholding certificates, health and welfare forms (if applicable), and direct deposit authorization (if applicable).

Leave Management

Explore Academy provides two types of paid leave to its employees: paid sick leave and paid time off (PTO). The employee handbook includes the accrual and limits of leaves for employees.

According to the employee handbook, paid sick leave is accrued based on the employee's role and accrual calendar, with a minimum accrual of one hour for every 30 hours worked. Leave accrual is capped for part-time, temporary and substitute employees. Accrued sick leave carries over from year to year and is not paid out upon separation from employment. Documents submitted by Explore Academy indicate that payouts for sick leave were made at the end of the 2024-25 fiscal year despite the employee handbook stating otherwise. The charter has authority to determine its own practice, but it should align with any policies, employment contracts and the employee handbook.

Paid time off is also accrued based on the employee's role and accrual calendar. Unlike paid sick leave, there is no provision in the handbook for PTO for temporary or substitute employees. While the handbook does not expressly state that PTO is paid out upon separation from employment, documentation provided by Explore Academy clearly shows payments for PTO to numerous employees throughout the year, with most occurring at the end of the 2024-25 fiscal year.

Recommendations

The charter school should:

1. Align the employee handbook and its practice for paying out sick leave.
2. Clarify the payout policy for PTO in its employee handbook.

Appendices

Appendix A – Study Agreement



**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
FOR MANAGEMENT ASSISTANCE**

This study agreement, hereinafter referred to as Agreement, is made and entered into by and between the Fiscal Crisis and Management Assistance Team, hereinafter referred to as the Team or FCMAT, and the Orange County Department of Education, hereinafter referred to as the Client; collectively, FCMAT and Client are hereinafter referred to as the Parties. This Agreement shall become effective from the date of execution hereof by FCMAT.

1. BASIS OF AGREEMENT

FCMAT provides a variety of services to local education agencies (LEAs) as authorized by Education Code (EC) 42127.8(d). The Client has requested that the FCMAT assign professionals to study specific aspects of the Client's operations. The professionals will include FCMAT staff and may include professionals from county offices of education, school districts, charter schools, community colleges, other public agencies or private contractors. All professionals assigned shall work under the direction of FCMAT. All work shall be performed in accordance with the terms and conditions of this Agreement.

FCMAT will notify the Client's county superintendent of schools of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

1. The Client has requested that FCMAT review the Explore Academy's 2025-26 adopted general fund budget and use it as a baseline to develop an independent multiyear financial projection (MYFP) for the current and two subsequent fiscal years. The MYFP will be a snapshot in time of the charter school's financial status. Make recommendations for expenditure reductions and/or revenue increases to help the charter school eliminate its structural budget deficit, if any.
2. Review the charter school's operational processes and procedures in the Business Services Department and make recommendations for improved efficiency, if any, in the following areas:
 - Budget development.
 - Budget monitoring.
 - Position control.
 - Payroll.
 - Accounts payable.
 - Accounts receivable.
 - Contracted services.

-
3. Review the charter school's operational processes and procedures in the Human Resources Department and make recommendations for improved efficiency, if any. The review will include, but may not be limited to:
 - Hiring, onboarding and exit interviews.
 - Evaluations.
 - Training and cross-training.
 - Personnel file management.
 - Leave management.
 4. The team will present the final report to the charter school's governing board at a public meeting following the completion of the review.

B. Services and Products to be Provided

1. Orientation Meeting
The Team will conduct an orientation session at the Client's location to brief the Client's management and supervisory personnel on the Team's procedures and the purpose and schedule of the study. This orientation meeting is normally held at the beginning of fieldwork for the study.
2. Fieldwork
The Team will conduct fieldwork at the Client's office and/or school site(s), or other locations as needed. Limited fieldwork may also be conducted remotely via telephone or videoconferencing services, in addition to the Public Safety Considerations outlined in Section 13 below.
3. Exit Meeting
The Team will hold an exit meeting at the conclusion of the fieldwork to inform the Client of the status of the study. The exit meeting will include a review of the scope of work; outstanding items, including documents, data and interviews not yet received or held; and the estimated timeline for a draft report. The meeting will not memorialize details regarding findings because the Team's conclusions may change after a complete analysis is finished. Exceptions to this will be findings of immediate health and safety concerns for students or staff, and other time-sensitive items that include the potential for risk or exposure to loss.
4. Exit Letter
Approximately 10 business days after the exit meeting, the Team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.
5. Draft Report
An electronic copy of a preliminary draft report will be delivered to the Client's point of contact identified below for review and comment.

6. Final Report

An electronic copy of the final report will be delivered to the Client's point of contact and to the Client's county superintendent of schools following completion of the study. FCMAT's work products are public and all final reports are published on the FCMAT website.

7. Board Presentation

Presentations to the Client's board are optional and are made at the request of the Client. If a board presentation is requested, it will be noted in the scope and objectives of the study or can be added as a change in scope at a later date.

8. Follow-Up Review

If requested by the Client within six to 12 months after completion of the study, FCMAT, at no additional cost, will assess the Client's progress in implementing the recommendations included in the report. This follow-up support is primarily a document review-based study. Progress in implementing the recommendations will be documented to the Client in a FCMAT management letter. FCMAT will work with the Client on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after the date of the final report.

3. PROJECT PERSONNEL

The personnel assigned to the study will be led by a FCMAT staff person (job lead) and will include at least one other professional. FCMAT will notify the Client of the assigned personnel when the fully executed copy of this Agreement is returned to the Client.

FCMAT will communicate to the Client any changes in assigned project personnel.

4. PROJECT COSTS

The cost for studies requested pursuant to EC 42127.8(d)(1) and 84041 shall be as follows:

- A. \$1,200 per day for each FCMAT staff member while on site conducting fieldwork. The cost of independent FCMAT consultants will be billed at their daily rate for all work performed. On-site is defined as either 1) physically at the Client's office or school site(s), or 2) in a scheduled virtual meeting with the Client's personnel, representatives or others associated with the scope of work pursuant to Section 13 below.
- B. All out-of-pocket expenses, including travel and its associated costs, and miscellaneous items necessary to complete the scope and objectives of the study.
- C. The applicable indirect rate at the time work is performed on the study will be added to all costs billed.
- D. The Client will be invoiced for 50% of the not-to-exceed cost shown below following completion of fieldwork (progress payment) and the remaining amount shall be due upon the issuance of the final report or presentation to the Client's board, whichever is later (final payment). The Parties agree that changes documented in a revised study agreement

may change the original not-to-exceed amount shown below. If changes are made before or during fieldwork, the new not-to-exceed amount documented in such a revised study agreement will constitute the basis for the progress payment. If changes are made after fieldwork, 100% of the total changed value documented in a revised study agreement, less progress payments made, will constitute the final payment due. All payments shall be due immediately based on the terms of the invoice.

Based on the scope and objectives of the study, the total not-to-exceed cost of the study will be \$32,000.

- E. Any change to the scope of work will affect the total cost. Changes may include, but are not limited to, delays, revisions to the scope of services, and substitution or addition of personnel. The need for changes shall be communicated by FCMAT to the Client in advance in the form of a revised study agreement.

Payments for FCMAT's services are payable to Kern County Superintendent of Schools, Administrative Agent, 1300 17th St., City Centre, Bakersfield, CA 93301.

5. RESPONSIBILITIES OF THE CLIENT

- A. Return current organizational chart(s) that show the Client's management and staffing structure with the signed copy of this Agreement. Organizational charts should be relevant to the scope of this Agreement.
- B. Provide private office or conference room space for the Team's use during fieldwork.
- C. Provide for a Client employee to upload all requested documents and data to FCMAT's online SharePoint repository per FCMAT's instructions. Provide FCMAT with the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT with the signed copy of this Agreement.
- D. Provide documents and data requested on the Team's initial and supplementary document request list(s) by the date requested.

All documents and data provided shall be responsive to FCMAT's request, in quality condition, readable and in a usable form. With few exceptions, documents and data requested are public records and records maintained by LEAs in the routine course of doing business. Some data requested may require exporting LEA financial system reports to Microsoft Excel or another usable format agreed to by FCMAT.

All documents shall be provided to FCMAT in electronic format, labeled as instructed by FCMAT. Upon approval of this Agreement, access will be provided to FCMAT's online SharePoint repository, to which the Client will upload all requested documents and data.

- E. Ensure appropriate senior-level staff are available for the orientation and exit meetings.
- F. Facilitate access to requested board members, officers and staff for interviews.
- G. Facilitate access to requested information and facilities to include, but not be limited to, files, sites, classrooms and operational areas for observation.

H. Review a draft of the report and return it to FCMAT by the date FCMAT requests with any comments regarding the accuracy of the report's data or the practicability of its recommendations. The Team will review this feedback in a timely manner and make any adjustments it deems necessary before issuing the final report.

I. Return the requested evaluation survey to FCMAT as described below.

6. PROJECT SCHEDULE

Time is of the essence. The Parties acknowledge that the goal of the scope and objectives of the study under this Agreement is to produce a timely and thorough report that adds value for the Client. To accomplish this goal, the Parties agree to communicate and mutually agree to honor established time commitments. These commitments include the Client providing requested documents, setting and keeping interview appointments and returning comments on the draft report consistent with the established project schedule.

The following project schedule milestones will be established by FCMAT upon receipt of a signed Agreement from the Client:

ACTION	TIMELINE
FCMAT provides the Client with a draft Agreement.	Draft Agreements are usually provided within 20 business days of the Client's initial request for services.
Client returns partially executed Agreement to FCMAT along with the applicable organizational chart and the name and email of the of person who will be responsible for collecting and uploading documents requested by FCMAT.	Draft Agreements are valid for 30 business days.
FCMAT returns a fully executed Agreement to the Client and identifies the project schedule and the lead and other personnel assigned to the job.	Within five business days of the Client's return of the signed Agreement.
Client uploads initial requested documents and data to FCMAT's online SharePoint repository.	Within 10 business days of the Client's receipt of the FCMAT document and data request list.
Fieldwork	Mutually agreed upon; usually, to commence within 10 business days of FCMAT's receipt of requested documents and data.
Orientation meeting	First day of fieldwork.
Exit meeting	Last day of fieldwork.
Follow up fieldwork, if needed (e.g., rescheduled interview, additional interviews).	Mutually agreed upon; usually, within five business days of FCMAT's request.

ACTION	TIMELINE
Client uploads supplemental documents and data to FCMAT's online SharePoint repository.	Within two business days of the Client's receipt of FCMAT's supplemental document and data request(s).
Draft report submitted to the Client.	To be determined, usually, within eight weeks of the conclusion of fieldwork and receipt of all documents and data requested.
Client comments on draft report	Within 10 business days of FCMAT providing a draft report to the Client.

The Client acknowledges that project schedule deadlines build upon and are contingent on each previous deadline. Missed deadline dates will affect future deadline dates and ultimately the timing of the final report. For example, if the Client does not provide requested documents and data by the specified date, the fieldwork may not be able to proceed as originally planned.

FCMAT acknowledges that the Client has an educational program to administer, is balancing many priorities, and in some cases may have records management difficulties, staffing capacity issues, staff on various types of leave, or other circumstances, all of which will affect the project schedule.

The Parties commit to regular communication and updates about the study schedule and work progress. FCMAT may modify the usual timelines as needed.

7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK

FCMAT will commence work as soon as it has assembled an available and appropriate study team, taking into consideration other jobs FCMAT has previously undertaken, assignments from the state, and higher priority assignments due to fiscal distress. The Team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the Client and any other related parties from which, in the Team's judgment, it must obtain information. Once the Team has completed its fieldwork, it will proceed to prepare a report. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a final report once fieldwork has been completed.

Prior to completion of fieldwork and upon written notice to FCMAT, the Client may terminate its request for service and will be responsible for all costs incurred by FCMAT to the date of termination under Section 4 (Project Costs). If the Client does not provide written notice of termination prior to completion of fieldwork, the Team will complete its work and deliver its final report and the Client will be responsible for the full costs.

FCMAT may terminate this Agreement at any time if the Client fails to cooperate with the requested project schedule, provide requested documents and data and/or make staff available for interviews as requested by FCMAT.

8. INDEPENDENT CONTRACTOR

FCMAT is an independent contractor and is not an employee or engaged in any manner with the Client. The manner in which FCMAT's services are rendered shall be within its sole control and discretion. FCMAT representatives are not authorized to speak for, represent, or obligate the Client in any manner without prior express written authorization from an officer of the Client.

9. RECORDS

The Client understands and agrees that FCMAT is a state agency and all FCMAT reports are public records and are published on the [FCMAT website](#). Supporting documents and data in FCMAT's possession may also be public records and will be made available in accordance with the provisions of the California Public Records Act.

FCMAT has a records retention policy and practice, and every effort will be made to maintain records related to this Agreement in accordance with this policy.

10. CONTACT WITH PUPILS

Pursuant to EC 45125.1, representatives of FCMAT will have limited contact with pupils. The Client shall take appropriate steps to comply with EC 45125.1.

11. INSURANCE

During the term of this Agreement, FCMAT shall maintain liability insurance of not less than \$1 million unless otherwise agreed upon in writing by the Client, automobile liability insurance in the amount required by California state law, and workers' compensation as required by California state law. Upon the request of the Client and receipt of the signed Agreement, FCMAT shall provide certificates of insurance, with the Client named as additional insured, indicating applicable insurance coverages.

12. HOLD HARMLESS

FCMAT shall hold the Client, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of FCMAT's board, officers, agents and employees undertaken under this Agreement. Conversely, the Client shall hold FCMAT, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of the Client's board, officers, agents and employees undertaken under this Agreement.

13. PUBLIC SAFETY CONSIDERATIONS

Whether due to public health considerations, extreme weather conditions, road closures, other travel restrictions or interruptions, shelter-at-home orders, LEA closures or other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the Client, and Project Schedule (Sections 2, 4, 5 and 6 herein) and other provisions herein may be revised. Examples of such revisions may include, but not be limited to, the following:

-
- A. Orientation and exit meetings, interviews and other information-gathering activities may be conducted remotely via telephone, videoconferencing, or other means. References to fieldwork shall be interpreted appropriately given the circumstances.
 - B. Activities performed remotely that are normally performed in the field shall be billed hourly as if performed in the field (excluding out-of-pocket costs that can otherwise be avoided).
 - C. The Client may be relieved of its duty to provide conference and other work area facilities for the Team.

14. FORCE MAJEURE

Neither party will be liable for any failure or delay in the performance of this Agreement due to causes beyond the reasonable control of the party, except for payment obligations by the Client.

15. EVALUATION

In the interest of continuous improvement, FCMAT will provide the Client with an evaluation survey at the conclusion of the services. FCMAT appreciates the Client's honest assessment of the Team's services and process. The Client shall return the evaluation survey within 10 business days of receipt.

16. CLIENT CONTACT PERSON

The Client's contact person designated below shall be the primary contact person for FCMAT to use in communicating with the Client on matters related to this Agreement. At any time when this Agreement or FCMAT's process requires that FCMAT send information, document request lists, draft report or final report, or when FCMAT makes other requests for the Client to act upon, this is the person whom FCMAT will contact. The Client may change the contact person upon written notice to FCMAT's job lead assigned to the study.

Name: Renee Hendrick, Deputy Superintendent, Operations
Telephone: (714) 966-4061
Email: rhendrick@ocde.us

17. SIGNATURES

Each individual executing this Agreement on behalf of a party hereto represents and warrants that he or she is duly authorized by all necessary and appropriate action to execute this Agreement on behalf of such party and does so with full legal authority.

For Client:



Stefan Bean, Ed.D., Superintendent
Orange County Department of Education

6/5/25
Date

For FCMAT:

Michael H. Fine Digitally signed by Michael H. Fine
Date: 2025.06.10 08:37:46 -07'00'

Michael H. Fine,
Chief Executive Officer
Fiscal Crisis and Management Assistance Team

Date

EXHIBIT E

CHARTER IMPACT

CONFIRMATION REGARDING REDUCTION IN PCSGP GRANT

JANUARY 7, 2026

From: [Prasanth Mudumby](#)
To: [Anna L. Day](#); [Cecilia Iglesias](#)
Cc: [Aracely Chastain](#)
Subject: Re: Explore 1st Interim Questions
Date: Wednesday, January 7, 2026 2:45:33 PM
Attachments: [PCSGP OER Template - Charter Schools \(CA Dept of Education\) - signed 12.22.pdf](#)

This domain is listed in Charter Impact's safelist.

Good Afternoon Anna,

Our October financials and 1st Interim included a PCSGP cash projection of \$276,000 based on a reimbursement request we had submitted at that time for approximately \$290,000 (the remaining budget from the previous administration). We projected slightly lower to account for any items that might be disallowed.

Since then, based on feedback and detailed review with the PCSGP team, we revised our submission. Our final submission, made on 12/23 and reflected in our updated November cash flow, is for \$186,981.07. Attached is a copy of the updated invoice.

Please let me know if this suffices or if you would like a copy of the original (now voided) invoice submission as well. Happy to get on a call to discuss at your convenience.

Best regards,
Prasanth

Prasanth Mudumby
Director of Client Finance

Charter Impact
8500 Balboa Blvd., Suite 140
Northridge, CA 91325
Office: (888) 474-0322 Ext. 404
Direct/Fax: (323) 622-1391
www.charterimpact.com

Privileged and Confidential Communication.

This electronic transmission, and any documents attached hereto, (a) are protected by the Electronic Communications Privacy Act (18 USC §§ 2510-2521), (b) may contain confidential and/or legally privileged information, and (c) are for the sole use of the intended recipient named above. If you have received this electronic message in error, please notify the sender and delete the electronic message. Any disclosure, copying, distribution, or use of the contents of the information received in error is strictly prohibited.

From: Anna L. Day <aday@ocde.us>
Sent: Tuesday, January 6, 2026 3:36 PM
To: Prasanth Mudumby <pmudumby@charterimpact.com>; Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Aracely Chastain <AChastain@ocde.us>
Subject: RE: Explore 1st Interim Questions

CAUTION: This message originated from an external domain, please use caution when

clicking on links or opening attachments.

Hello,

I did not receive a response to my question below. Please provide the documentation that you submitted to PCSGP for the expense reimbursement totaling approximately \$276,000.

Thank you,

Anna Day
Administrator, Charter Schools Fiscal Oversight
Orange County Department of Education
714-966-4387

From: Anna L. Day
Sent: Monday, December 15, 2025 5:25 PM
To: Prasanth Mudumby <pmudumby@charterimpact.com>; Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Aracely Chastain <ACHastain@ocde.us>
Subject: RE: Explore 1st Interim Questions


Hi Prasanth,

Actuals through October 31, 2025, show Accounts Receivable totaling \$133,337. Can you provide backup documentation supporting the expenditure reimbursement for PCSGP?

Thank you,

Anna Day
Administrator, Charter Schools Fiscal Oversight
Orange County Department of Education
714-966-4387

From: Prasanth Mudumby <pmudumby@charterimpact.com>
Sent: Monday, December 15, 2025 5:18 PM
To: Anna L. Day <aday@ocde.us>; Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Aracely Chastain <ACHastain@ocde.us>
Subject: Re: Explore 1st Interim Questions

 This domain is listed in Charter Impact's safelist.

Hi Anna,

Absolutely. In the cash flow model, the \$367,816 projected for January 2026 reflects the receipt of several receivables. The most material item is the final PCSGP payment of approximately \$276K, along with receipts from other state funds (CEI Marin Schools) + child nutrition reimbursements,

and SPED receivables.

Please let me know if you'd like additional information.

Best,
Prasanth

Prasanth Mudumby

Director of Client Finance

Charter Impact

8500 Balboa Blvd., Suite 140

Northridge, CA 91325

Office: (888) 474-0322 Ext. 404

Direct/Fax: (323) 622-1391

www.charterimpact.com

Privileged and Confidential Communication.

This electronic transmission, and any documents attached hereto, (a) are protected by the Electronic Communications Privacy Act (18 USC §§ 2510-2521), (b) may contain confidential and/or legally privileged information, and (c) are for the sole use of the intended recipient named above. If you have received this electronic message in error, please notify the sender and delete the electronic message. Any disclosure, copying, distribution, or use of the contents of the information received in error is strictly prohibited.

From: Anna L. Day <aday@ocde.us>

Sent: Monday, December 15, 2025 4:25 PM

To: Prasanth Mudumby <pmudumby@charterimpact.com>; Cecilia Iglesias
<ciglesias@explorepublicschools.org>

Cc: Aracely Chastain <AChastain@ocde.us>

Subject: RE: Explore 1st Interim Questions

CAUTION: This message originated from an external domain, please use caution when clicking on links or opening attachments.

Hi Prasanth,

Please explain the \$367,816 projected to be received in January 2026 in the cash flows (balance sheet section).

Thank you,

From: Prasanth Mudumby <pmudumby@charterimpact.com>

Sent: Monday, December 15, 2025 4:18 PM

To: Anna L. Day <aday@ocde.us>; Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Aracely Chastain <AChastain@ocde.us>
Subject: Re: Explore 1st Interim Questions

✓ This domain is listed in Charter Impact's safelist.

Hi Anna,

Please see attached. Apologies, I had sent you a draft version earlier. Attached is the version that was approved by the board on 12/09, with the change to the cash flows tab as discussed on the phone earlier.

Please do reach out if you need anything else.

Best, Prasanth

Prasanth Mudumby

Director of Client Finance

Charter Impact

8500 Balboa Blvd., Suite 140

Northridge, CA 91325

Office: (888) 474-0322 Ext. 404

Direct/Fax: (323) 622-1391

www.charterimpact.com

Privileged and Confidential Communication.

This electronic transmission, and any documents attached hereto, (a) are protected by the Electronic Communications Privacy Act (18 USC §§ 2510-2521), (b) may contain confidential and/or legally privileged information, and (c) are for the sole use of the intended recipient named above. If you have received this electronic message in error, please notify the sender and delete the electronic message. Any disclosure, copying, distribution, or use of the contents of the information received in error is strictly prohibited.

From: Anna L. Day <aday@ocde.us>

Sent: Monday, December 15, 2025 3:24 PM

To: Prasanth Mudumby <pmudumby@charterimpact.com>; Cecilia Iglesias <ciglesias@explorepublicschools.org>

Cc: Aracely Chastain <AChastain@ocde.us>

Subject: RE: Explore 1st Interim Questions

CAUTION: This message originated from an external domain, please use caution when clicking on links or opening attachments.

Also, the updated 1st interim report is based on lower enrollment for 2026-27 and 2027-28. Is this correct? Is this the updated interim report that the governing board will review and ratify?

Thank you,

Anna Day

Administrator, Charter Schools Fiscal Oversight

Orange County Department of Education

714-966-4387

From: Anna L. Day

Sent: Monday, December 15, 2025 3:19 PM

To: 'Prasanth Mudumby' <pmudumby@charterimpact.com>; Cecilia Iglesias
<ciglesias@explorepublicschools.org>

Cc: Aracely Chastain <AChastain@ocde.us>

Subject: RE: Explore 1st Interim Questions

Hi Prasanth,

Can you also provide the detail of the \$367,816 projected to be received in January 2026 in the cash flows?

Thank you,


Anna Day

Administrator, Charter Schools Fiscal Oversight

Orange County Department of Education

714-966-4387

From: Prasanth Mudumby <pmudumby@charterimpact.com>
Sent: Monday, December 15, 2025 3:09 PM
To: Anna L. Day <aday@ocde.us>; Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Aracely Chastain <AChastain@ocde.us>
Subject: Re: Explore 1st Interim Questions

 This domain is listed in Charter Impact's safelist.

Hi Anna,

Thanks for your call. As discussed, the Other State Revenue of \$70,000 in the budget represents a 25-26 Community Engagement Initiative grant for a peer leading and learning network from Marin County Office of Education.

Other Local Revenue relates to a fundraising target from local sources the school has set.

Regarding the cash flows, thank you for highlighting your question. Please see the updated version attached. Please give me a call when you're available to talk through the cash flows.

Thank you,

Prasanth

Prasanth Mudumby

Director of Client Finance

Charter Impact

8500 Balboa Blvd., Suite 140

Northridge, CA 91325

Office: (888) 474-0322 Ext. 404

Direct/Fax: (323) 622-1391

www.charterimpact.com

Privileged and Confidential Communication.

This electronic transmission, and any documents attached hereto, (a) are protected by the Electronic Communications Privacy Act (18 USC §§ 2510-2521), (b) may contain confidential and/or legally privileged information, and (c) are for the sole use of the intended recipient named above. If you have received this electronic message in error, please notify the sender and delete the electronic message. Any disclosure, copying, distribution, or use of the contents of the information received in error is strictly prohibited.

From: Anna L. Day <aday@ocde.us>
Sent: Monday, December 15, 2025 12:22 PM
To: Cecilia Iglesias <ciglesias@explorepublicschools.org>
Cc: Prasanth Mudumby <pmudumby@charterimpact.com>; Aracely Chastain <AChastain@ocde.us>
Subject: Explore 1st Interim Questions

CAUTION: This message originated from an external domain, please use caution when clicking on links or opening attachments.

Good afternoon,

Please provide an explanation for the amounts listed under 'Other State Revenues' and 'Local Revenue' in the budget, as well as the \$367,816 projected to be received in January 2026 in the cash flows.

Please provide a response as soon as possible.

Thank you,

Anna Day

Administrator, Charter Schools Fiscal Oversight

Orange County Department of Education

714-966-4387

ORANGE COUNTY DEPARTMENT OF EDUCATION
E-MAIL CONFIDENTIALITY NOTICE

This e-mail communication and any attachments, including documents, files, or previous e-mail messages, constitute electronic communications within the scope of the Electronic Communications Privacy Act, 18 U.S.C. § 2510 et seq. This e-mail communication may contain non-public, confidential or legally privileged information intended for the sole use of the designated recipient(s). The unauthorized and intentional interception, use, copy or disclosure of such information, or attempt to do so, is strictly prohibited and may be unlawful under applicable laws. 18 U.S.C. § 2511. If you have received this e-mail communication in error, please immediately notify the sender by return e-mail and delete the original e-mail from your system.

ORANGE COUNTY DEPARTMENT OF EDUCATION
E-MAIL CONFIDENTIALITY NOTICE

This e-mail communication and any attachments, including documents, files, or previous e-mail messages, constitute electronic communications within the scope of the Electronic Communications Privacy Act, 18 U.S.C. § 2510 et seq. This e-mail communication may contain non-public, confidential or legally privileged information intended for the sole use of the designated recipient(s). The unauthorized and intentional interception, use, copy or disclosure of such information, or attempt to do so, is strictly prohibited and may be unlawful under applicable laws. 18 U.S.C. § 2511. If you have received this e-mail communication in error, please immediately notify the sender by return e-mail and delete the original e-mail from your system.

ORANGE COUNTY DEPARTMENT OF EDUCATION
E-MAIL CONFIDENTIALITY NOTICE

This e-mail communication and any attachments, including documents, files, or previous e-mail messages, constitute electronic communications within the scope of the Electronic Communications Privacy Act, 18 U.S.C. § 2510 et seq. This e-mail communication may contain non-public, confidential or legally privileged information intended for the sole use of the designated recipient(s). The unauthorized and intentional interception, use, copy or disclosure of such information, or attempt to do so, is strictly prohibited and may be unlawful under applicable laws. 18 U.S.C. § 2511. If you have received this e-mail communication in error, please immediately notify the sender by return e-mail and delete the original e-mail from your system.

ORANGE COUNTY DEPARTMENT OF EDUCATION
E-MAIL CONFIDENTIALITY NOTICE

This e-mail communication and any attachments, including documents, files, or previous e-mail messages, constitute electronic communications within the scope of the Electronic Communications Privacy Act, 18 U.S.C. § 2510 et seq. This e-mail communication may contain non-public, confidential or legally privileged information intended for the sole use of the designated recipient(s). The unauthorized and intentional interception, use, copy or disclosure of such information, or attempt to do so, is strictly prohibited and may be unlawful under applicable laws. 18 U.S.C. § 2511. If you have received this e-mail communication in error, please immediately notify the sender by return e-mail and delete the original e-mail from your system.

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Stefan Bean, Ed.D., Orange County Superintendent of Schools

FROM: Maria Martinez-Poulin, Ed.D.
Chief of Alternative Education

SUBJECT: Mid-Year Update of the 2025-26 OCDE Local Control and Accountability Plan

BACKGROUND:

Senate Bill 114 (2023) added Education Code 52068(a)(6) requiring a county office to present a report on the annual update to the Local Control and Accountability Plan (LCAP) and the local control funding formula Budget Overview for Parents (BOP) on or before February 28 at a regularly scheduled meeting of the governing board or body of the LEA.

The report includes the following:

All available midyear outcome data related to metrics identified in the current LCAP; and,

All available midyear expenditure and implementation data on all actions identified in the current LCAP.

RECOMMENDATION:

Information item.

Monitoring Goals, Actions, and Resources for the 2025-26 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2025-26 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Orange County Department of Education	Stefan Bean, Ed.D. Orange County Superintendent of Schools	sbean@ocde.us (714) 966-4001

Goal 1

Goal Description

INCREASE ENGAGEMENT: OCDE collaborates with families, schools, and educational partners to establish a foundation for student success in welcoming, supportive, and inclusive school environments. The framework offers all students engaging programs, personalized instruction, and opportunities in school communities that support respect, cultural appreciation, and inclusivity. By prioritizing responsive involvement, educational partners play a crucial role in enhancing engagement and improving student outcomes, including English language proficiency, attendance rates, and social-emotional well-being, through customized programs and services.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	Percentage of students who report that their school supports and values cultural diversity and inclusion, based on LCAP survey results.	ACC: 79% AJH 47%: (Source: 2023-2024 LCAP Survey)	ACC: 77% AJH: 60% (Source: 2024-2025 LCAP Survey)		In Progress (Source: 2025-2026 LCAP Survey)	ACC: 85% AJH: 55% (Source: LCAP Survey)
1.2	Percentage of parent LCAP survey responses received by the ACCESS schools and Connections.	ACCESS: 26% Connections: 12% (Source: 2023-2024 LCAP Survey Results/Title I)	ACCESS: 30% Connections: 6% Source: 2024-2025 LCAP Survey Results/Title I		In Progress Source: 2025-2026 LCAP Survey Results/Title I	ACCESS: 40% Connections: 30% (Source: LCAP Survey Results/Title I)
1.3	Number of parent/guardians of English Learner students who attend District English Language Advisory (DELAC) Committee meetings to ensure at least 2 parents are present per school.	ACC: 148 parents of ELs AJH: 28 parents of ELs OCCS: 0 Connections: 0 (Source: Multilingual Student Services office/2023-2024)	ACC: 115 parents of ELs AJH: 8 parents of ELs OCCS: 0 Connections: 0 (Source: Multilingual Student Services office/2024-2025)		ACC: 74 YTD AJH: 5 YTD OCCS: 0 YTD CONNECTIONS: 0 YTD (Source: Multilingual Student Services office/2025-2026)	ACC: 150 parents of ELs AJH: 15 parents of ELs OCCS: 5 parents of ELs Connections: 4 parents of ELs (Source: Multilingual Student Services office)
1.4	Number of ACCESS County Community (ACC) and ACCESS Juvenile Hall (AJH)	ACC: 31 parents of ELs AJH: 1 parent of ELs	ACC: 21 parents of ELs AJH: 0		ACC: 33 YTD AJH: 4 YTD	ACC: 35 parents of ELs AJH: 5 parents of ELs

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	parents/guardians of English Language learner students who attend school's English Learner Advisory Committee (ELAC) meetings.	(Source: Multilingual Student Services office/2023-2024)	(Source: Multilingual Student Services office/2024-2025)		(Source: Multilingual Student Services office/2025-2026)	(Source: Multilingual Student Services office)
1.5	Number of parent/guardian events, trainings, and/or opportunities to facilitate family involvement.	2023-24 Family Engagement Activities, to date: ACCESS: 336 Connections: 66 (Source: Title I and Connections Office/ 2023-2024)	2024-25 Family Engagement Activities, to date: ACCESS: 399 Connections: 80 (Source: Title I and Connections Office/ 2024-2025)		2025-26 Family Engagement Activities to date: ACCESS: 227 Connections: 60 (Source: Title I and Connections Office/2025-2026)	ACCESS: 350 Connections: 75 (Source: Title I and Connections Office)
1.6	Attendance Rate: All, English Learners, and Homeless	2022-2023 attendance rate: All: 77.76% EL: 73.01% HL: 63.24% (Source: 2022-2023 CALPADS 14.2)	2023-2024 attendance rate: All: 79% EL: 76% HL: 68% (Source: 2023-2024 CALPADS 14.2)		2024–2025 attendance rate: All: 80% EL: 77% HL: 70% (Source: 2024–2025 CALPADS 14.2)	All: 80% EL: 80% HL: 75% (Source: CALPADS 14.2)
1.7	Dashboard Chronic Absenteeism Rate (TK-8th only) ACCESS schools and CONNECTIONS overall rate and in the following TK-8th grade student groups: EL FY HL LI SWD	ACCESS: All: 52.3% EL: 56.7% FY: 35.9% HL: 64.8% LI: 50.8% SWD: 42.6% Connections: All: 30.3% EL: 40.2% FY: 21.4% HL: 0% LI: 27.7% SWD: 30.3%	ACCESS: All: 38% EL: 53% FY: 23% HL: 68% LI: 46% SWD: 33% LTEL: 57% * Connections: All: 45% EL: 54% FY: 0% HL: 0% LI: 46% SWD: 45%		ACCESS: All: 38% EL: 49% FY: 44% HL: 59% LI: 47% SWD: 50% LTEL: 54%* Connections: All: 31% EL: 41% FY: Data not Available (Small cohort) HL: 0%	ACCESS: All: 40% EL: 40% LTEL: 40%* FY: 30% HL: 45% LI: 40% SWD: 30% Connections: All: 25% EL: 35% FY: 18% HL: 0% LI: 20% SWD: 25%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2023 CA Dashboard)	LTEL: 50% * (Source: 2024 CA Dashboard) * New student group in 2024		LI: 36% SWD: 31% LTEL: Data not Available (Small cohort)* (Source: 2025 CA Dashboard) * New student group in 2024	LTEL: 35%* (Source: CA Dashboard) *New student group in 2024
1.8	Suspension Rate	OCDE All: 2.1% ACC All: 3.1% EL 4.9% SWD 4.7% LI: 3.3% FY: 6.6% HL: 3.5% AJH: 0% EL: 0% LI: 0% FY: 0% HL: 0% OCCS: 0% EL: 0% LI: 0% FY: 0% HL: 0% Connections: 0.5% EL: 0% LI: 1% FY: 0% HL: 0%	OCDE All: 2% ACC All: 2% EL: 4% SWD: 3% LTEL: 4% * LI: 3% FY: 2% HL: 3% AJH: 2% EL: 1% LTEL: 2% LI: 2% FY: .5% HL: 5% OCCS: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0% Connections: 0.7% EL: 0% LTEL: 0% LI: 1% FY: 0% HL: 0%		OCDE All: 1.5% ACC: 1.8% EL: 2.4% SWD: 2.2% LTEL: 2%* LI: 1.9% FY: 3.5% HL: 1.9% AJH: 0.7% EL: 1% LTEL: 1.1% LI: 0.7% FY: 1.1% HL: 0% OCCS: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0% Connections: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0%	OCDE All: 1.0% ACC All: 2% EL 3% SWD 3% LTEL: 3% * LI: 3% FY: 3% HL: 3% AJH: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0% OCCS: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0% Connections: 0% EL: 0% LTEL: 0% LI: 0% FY: 0% HL: 0%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2023 CA Dashboard)	(Source: 2024 CA Dashboard) * New student group in 2024		(Source: 2025 CA Dashboard) * New student group in 2024	(Source: 2024 CA Dashboard) * New student group in 2024
1.9	Graduation Rate	4/5 Year Cohort (Traditional School) Dashboard Accountability Methodology: OCDE All: 47.2% EL: 41.6% FY: 49% Hisp: 46.9% HL: 43.2% LI: 44.7% SWD: 49.7% Wh: 51.4% As: 56.3% ACC All: 44% EL: 37.9% FY: 55.9% Hisp: 44.1% HL: 42.3% LI: 43% SWD: 50% Wh: 46.2% AJH All: 40.8% EL: 51.2% Hisp: 52.9% LI: 40.8% SWD: 48.6% FY: 35.3% HL: 48.7% OCCS: All: 78.2% LI: 80.4%	4/5 Year Cohort (Traditional School) Dashboard Accountability Methodology: OCDE All: 48% EL: 45% FY: 41% Hisp: 47% HL: 47% LI: 47% SWD: 51% Wh: 51% As: 55% LTEL: 45% * ACC All: 46% EL: 46% FY: 47% Hisp: 46% HL: 48% LI: 46% SWD: 50% Wh: 42% LTEL: 46% * AJH All: 35% EL: 37% Hisp: 36% LI: 35% SWD: 39% LTEL: 38% * FY: 30% HL: 36% OCCS: All: 75%		4/5 Year Cohort (Traditional School) Dashboard Accountability Methodology: OCDE All: 55% EL: 54% FY: 50% Hisp: 54% HL: 54% LI: 54% SWD: 52% Wh: 64% As: 62% LTEL: 56% * ACC All: 55% EL: 55% FY: 55% Hisp: 53% HL: 54% LI: 55% SWD: 51% Wh: 60% LTEL: 57% * AJH All: 42% EL: 44% FY: 41% Hisp: 47% HL: 48% LI: 42% SWD: 50% LTEL: 46% * OCCS	4/5 Year Cohort (Traditional School) Dashboard Accountability Methodology: OCDE All: 60% EL: 60% FY: 60% Hisp: 60% HL: 60% LI: 60% SWD: 60% Wh: 60% As: 60% LTEL: 60% * ACC All: 60% EL: 60% FY: 60% Hisp: 60% HL: 60% LI: 60% SWD: 60% Wh: 60% LTEL: 60% * AJH All: 60% EL: 60% Hisp: 60% LI: 60% SWD: 60% LTEL: 60% * FY: 60% HL: 60% OCCS: All: 85%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		FY: N/A EL: Less than 11 students; Data not displayed HL: Less than 11 students; Data not displayed Connections: All/SWD: 10% LI: 12.5% FY: Less than 11 students; Data not displayed EL: Less than 11 students; Data not displayed HL: Less than 11 students; Data not displayed (Source: 2023 CA Dashboard- Combined School Data) OCDE (Combined School Rate) One-Year 12th Grade Cohort Grad Rate- (prior Dashboard calculation for alternative schools- informational only) All Students: 72% EL: 71% FY: 72% HL: 77% LI: 68% SWD: 62%	LI: 77% FY: N/A EL: Less than 11 students; Data not displayed HL: Less than 11 students; Data not displayed LTEL: Less than 11 students; Data not displayed Connections: All/SWD: 27% LI: 28% FY: Less than 11 students; Data not displayed EL: Less than 11 students; Data not displayed HL: N/A LTEL: Less than 11 students; Data not displayed (Source: 2024 CA Dashboard- Combined School Data) OCDE (Combined School Rate) One-Year 12th Grade Cohort Grad Rate- (prior Dashboard calculation for alternative schools- informational only) All Students: 74% EL: 73% FY: 62% HL: 84% LI: 71% SWD: 64%		All: 87% EL: Less than 11 students; Data not displayed FY: Less than 11 students; Data not displayed HL: Less than 11 students; Data not displayed LI: 86% LTEL: Less than 11 students; Data not displayed Connections: All/SWD: 38% LI: 41% FY: Less than 11 students; Data not displayed EL: Less than 11 students; Data not displayed HL: Less than 11 students; Data not displayed LTEL: Less than 11 students; Data not displayed (Source: 2025 CA Dashboard- Combined School Data) OCDE (Combined School Rate) One-Year 12th Grade Cohort Grad Rate- (prior Dashboard calculation for alternative schools- informational only)	LI: 85% FY: 85% EL: 85% HL: 85% LTEL: 85% Connections: All/SWD: 20% LI: 20% FY: 20% EL: 20% HL: 20% LTEL: 20% (Source: CA Dashboard) OCDE (Combined School Rate) One-Year 12th Grade Cohort Grad Rate- (prior Dashboard calculation for alternative schools- informational only) All Students: 85% EL: 80% FY: 80% HL: 85% LI: 75% SWD: 70% LTEL: 80% *

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		EL: 6% FY: Not publicly reported due to small cohort size (Source: Aeries/SIS report, CALPADS information day 2023-2024)	EL: 6% FY: Not publicly reported due to small cohort size (Source: Aeries/SIS report, CALPADS information day 2024-2025)		EL: 7% FY: Not publicly reported due to small cohort size (Source: Aeries/SIS report, CALPADS information day 2025-2026)	EL- 4% FY: 1% (Source: Aeries/SIS report, CALPADS information day)
1.12	LEA Expulsion Rate	All: 0% EL: 0% LI: 0% FY: 0% (Source: 2022-2023 DataQuest)	All: 0% EL: 0% LI: 0% FY: 0% (Source: 2023-2024 DataQuest)		All: 0% EL: 0% LI: 0% FY: 0% (Source: 2024-2025 DataQuest)	All: 0% EL: 0% LI: 0% FY: 0% (Source: DataQuest)
1.13	Percentage of ACCESS parents who have discussed their child(ren)'s education and academic progress with his/her teacher(s)	70% (Source: 2023-2024 LCAP Survey)	78% (Source: 2024-2025 LCAP Survey)		In Progress (Source: 2025-2026 LCAP Survey)	80% (Source: LCAP Survey)

2025-26 LCAP Goal 1 and Actions - Implementation Update

Goal 1 - Action 1: Increased Communication for All Educational Partners

Family, student, and partner engagement through LCAP surveys, Listening Circles, and Advisory Committees reveals the need for timely and accessible information. The Parent Portal allows a venue for ongoing monitoring of student attendance and academic progress. We will ensure all students, families, and district partners have access to pertinent student information in a variety of formats, such as Parent Portal, home-school messaging systems, and an online dashboard. We will provide trainings on the use of these systems and offer computer stations for families to use in school offices to increase access. Through the Parent Portal and increased use of messaging, parents and students will be able to track daily attendance, receive important school announcements, monitor assignment completion, and raise awareness of school events to support families and students. By empowering families and students with these tools, OCDE will foster a culture of active involvement and advocacy for student achievement. We believe that this proactive approach will result in improved attendance rates and increased high school completion for all students, ultimately leading to greater success in their academic journeys.

Note: LREBG funds in the amount of \$121,581 were added to this action to provide additional resources to increase communication for all educational partners. Experience shows that the administrative technician ensures accurate student data management, helping educators identify attendance issues, enrollment changes, and other risk factors early. This timely information supports early interventions and targeted outreach to improve student outcomes. The metrics used to monitor the impact of this action are 1.3, 1.4, 1.7, and 1.13. See Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	OCDE school programs continue to emphasize clear, accessible communication with families, students, and partners by strengthening systems that support information sharing and engagement. Ongoing use of digital platforms	\$915,363	\$252,283

	<p>and targeted supports are designed to improve access to student information, encourage timely monitoring of attendance and progress, and support informed participation in the educational process.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • Contracts for the existing student database system and parent communication tools have been renewed, and ongoing training is offered to staff on how to use these resources. • To maintain connectivity with our district partners, academic progress updates are provided to the districts for their students referred to an ACCESS community school or enrolled in an ACCESS institution school program. • ParentSquare, a centralized communication system connecting schools and parents, is now being used throughout OCDE schools to engage and inform families. • From July 2025 to January 2026, 125,990 emails and 42,198 messages were sent through School Messenger to students, families, and staff regarding school updates, academic support, attendance, events, and critical reminders, which demonstrates a strong commitment to consistent, timely communication across our OCDE school communities. 		
--	---	--	--

Goal 1 - Action 2: Family Engagement to Close Equity Gaps

Parent feedback reflects their interest in participating in inclusive school events that offer meaningful connections between families and their child's teacher and provides school information and resources to support positive student outcomes. This is especially true for the families of our students have disabilities and students who are English learners, foster youth, and SED for whom engagement between the school and the home historically has been less accessible due to barriers including scheduling conflicts, the lack of transportation and child care, and the inability to interact with school staff in their home language. To address this, we provide improved interpretation services to ensure effective communication with all families. We will also provide students and their families with transportation assistance via bus passes and more opportunities to participate in multi-lingual activities scheduled at a variety of times, such as parenting workshops and parent/school information sessions, that ensures accessibility for all and offers parents and students the knowledge necessary to navigate the educational system and to advocate for student needs. We are also increasing the budget to support staff attendance and participation at those events that occur outside the work day. Family engagement will lead to increased attendance, engagement, and academic achievement for students. Through these collaborative efforts, we strive to create an environment where every student and family feels valued, supported, and empowered to succeed.

Note: LREBG funds in the amount of \$434,307 were added to this action to provide additional resources to increase family engagement to close equity gaps. Site-level data shows that Community Resource Specialists help remove barriers to learning by connecting families with essential resources like food, housing, and healthcare, stabilizing home environments. This support strengthens family-school partnerships and enables students to focus on and succeed in their education. The metrics used to monitor the impact of this action are 1.2, 1.3, 1.4, and 1.5. Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	OCDE school programs are expanding inclusive family engagement opportunities by reducing barriers to participation and strengthening access to school	\$950,921	\$262,154

	<p>information and resources. Targeted supports such as interpretation services, transportation assistance, multilingual programming, and flexible scheduling are designed to ensure all families can meaningfully engage with school staff and support student success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July 2025 to January 2026, 287 events for families were held throughout OCDE school programs (60 in Connections and 227 in ACCESS). These events helped to build school engagement, invite input from educational partners on school improvement, and deepen connections between schools, families, and the community. Additional events and activities will be offered as the school year continues. 		
--	--	--	--

Goal 1 - Action 3: Extended Learning Opportunities to Close Equity Gaps

Students and parents shared their eagerness to continue co-curricular activities and extended learning to support student engagement, achievement, and pro-social development. For our students who are English Learners, foster youth, and SED who would not otherwise have access to these types of activities, experiences, and opportunities for expanded learning, the value of these activities is particularly relevant. Unduplicated pupil groups are at a disadvantage when it comes to accessing opportunities occurring outside of the school and beyond the school day, and the lack of these valuable experiences limits their personal growth and negatively impacts student outcomes. Therefore, OCDE schools will provide students with extended learning opportunities (such as performing arts camp, field trips, additional classes and coursework, and hands-on workshops) and scholarships for low-income students that accelerate learning, increase positive, pro-social connections to school, build interpersonal skills, and encourage empowerment and collaborative team-building. Through an analysis of participant feedback and attendance data, we anticipate an overall increase in school attendance, a decline in suspension rates, heightened engagement, and improved student

achievement and graduation rates, particularly among our unduplicated populations. By ensuring fair access and offering diverse opportunities for enrichment, we are laying the groundwork for every student to unlock their fullest potential.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Expanded co-curricular and extended learning opportunities support student engagement, pro-social development, and academic success across OCDE schools. Increased access to enrichment experiences is intended to strengthen students' connection to school and improve outcomes, particularly for unduplicated pupil groups.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • In July and August 2025, 24 students from ACCESS community and institution schools were selected to participate in a two-week, immersive educational arts program in partnership with the Segerstrom Center for the Arts. Staff from OCDE school programs assisted in the implementation of this opportunity. • Between July 2025 and January 2026, the Beats Lyric Leaders program served approximately 205 ACCESS students through workshops that developed creativity, music skills, and business knowledge, while providing opportunities for 	\$3,304,497	\$2,006,483

	<p>self-expression and collaboration.</p> <ul style="list-style-type: none"> • In the first semester of the 2025-26 school year, the Pacific Coast High School drama club performed an original play, <i>Star-Crossed Wires</i>, written by the Drama instructor. • Three community library partnership programs are planned for Spring 2026 to provide library cards to participating ACCESS students and familiarize program participants with the vast resources available at Orange County public libraries. • Educational field trips supported by LCAP Goal 1 - Action 3 from July 2025 to the end of December 2025 include Tanaka Farms, Aquarium of the Pacific, Disneyland STEM Workshops, OC Zoo, Shipley Nature Center, Bolsa Chica Conservancy, OCC Planetarium, Natural History Museum, and the La Brea Tar Pits. 		
--	---	--	--

Goal 1 - Action 4: Extended Learning Opportunities Principally Benefiting Students who are English Learners and their Families

Participation in extended learning activities has shown to significantly boost student engagement, resulting in positive outcomes for both students and their families. However, English Learners (EL) and their families, including Long Term English Learners (LTELs), enrolled in ACCESS often lack the ability to effectively engage in school activities due to language barriers and unfamiliarity with the educational system. To ensure equitable access to these opportunities, we are committed to providing students who are English Learners (EL) and their families with customized, language accessible programs and events specific to their needs. These initiatives include bilingual parent workshops, EL parent conferences, and regional collaborative meetings which serve as platforms for equipping parents and students with the knowledge and skills necessary to navigate the educational landscape effectively while offering insights on advocating

for student needs and facilitating connections to community resources specifically tailored to support EL families. Enhancing engagement among EL students and their families will result in positive outcomes and improved academic achievement. Through these targeted efforts, we are fostering supportive, culturally responsive environments where every EL student can thrive academically and socially.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Targeted extended learning and engagement supports are being strengthened to better serve English Learners and their families. Language-accessible programs and family-focused outreach are designed to increase participation, build understanding of the educational system, and support improved academic outcomes for EL students.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July through December 2025, four District English Learner Advisory Committee (DELAC) meetings were held to provide families of English Learner students with ongoing opportunities to learn about language development services and instructional programs offered through ACCESS. These meetings supported consistent family engagement and parent voice, with 78 ACCESS parents participating during the mid-year period. • From July 2025 to December 2025, four school-level English Learner Advisory Committee 	\$458,081	\$102,131

	<p>(ELAC) meetings were held at ACCESS sites meeting the 21 or more English Learner student threshold, as required. These parent advisory committees provided families opportunities to learn about school programs and services and to share input that helps inform supports for multilingual learners.</p> <ul style="list-style-type: none"> Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 1 - Action 5: Healthy and Positive School Environments

Feedback gathered from focus groups with staff, families, and partners, empathy interviews with students, OCDE LCAP surveys, and the Conditions of Children in Orange County report highlight the ongoing need to prioritize safe and nurturing school environments, while also emphasizing the importance of fostering a positive school climate. To comprehensively address these concerns, we are dedicated to ensuring that every student and staff member has access to environments that are safe, inclusive, and conducive to learning. This commitment entails ongoing initiatives such as soliciting recommendations from the Site Safety Committee, procuring necessary safety equipment, and deploying Wellness/Restorative staff in our schools to offer crucial support and guidance to students during moments of stress or conflict. Our school nurses will also play a vital role in promoting health and wellness by providing guidance on making healthy choices, conducting vision and hearing screenings, and facilitating access to health-related services for students and families in need. Similarly, we recognize the importance of equipping our staff with the necessary tools and strategies to cultivate a positive school climate, and we will offer comprehensive trainings focused on restorative and trauma-informed practices, alternatives to suspension, and positive classroom management techniques so students are able to stay in school and participate fully in their learning. By nurturing a culture where students and staff feel cared for and respected, we anticipate a corresponding increase in attendance rates and, ultimately, an improvement in student outcomes across the board.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4, Student Achievement and Priority 5, Chronic Absenteeism/Graduation Rate, Priority 8, CCI/Student Outcomes

Metrics: 1.1, 1.5, 1.7, 1.9

Note: LREBG funds in the amount of \$642,082 were added to this action to provide additional resources in support of healthy and positive school environments. According to research, Restorative Justice Specialists and behavioral paraeducators support academic success by addressing behavior-related barriers to learning. Restorative practices promote accountability and reduce suspensions, keeping students engaged, while behavioral paraeducators provide consistent support to improve self-regulation and maintain a focused, inclusive classroom environment. The metrics used to monitor the impact of this action are 1.1, 1.7, and 1.9. See Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Creating safe, supportive, and inclusive learning environments remains a core priority across OCDE schools. Ongoing investments in school safety, wellness supports, and staff training are intended to strengthen positive school climate, support student well-being, and improve overall student outcomes.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July 2025 to December 2025, Art and Creativity for Healing provided 261 art workshops across 25 ACCESS sites to offer students guided art instruction supporting creativity and positive mental health practices. • LCAP funds were used to purchase software to help keep students safe online by monitoring school-approved digital platforms for potential safety concerns. Alerts allow staff to respond quickly and 	\$3,645,868	\$1,577,923

	<p>provide timely support, strengthening student well-being and maintaining a safe digital learning environment.</p> <ul style="list-style-type: none"> • Funds in the LCAP support an external professional learning and coaching partner to strengthen practices that directly impact school climate. This intensive support builds staff capacity, improves consistency and relationships, and contributes to a safer, more positive, and supportive learning environment for students. • LCAP funds support contracted substitute nursing services to ensure continuity of school health care when regular nurses are absent. This investment is especially critical for our low-income student population, for whom school-based health services are essential to daily attendance, safety, and overall well-being. • Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 1 - Action 6: Essential Items for Students who are Low Income/SED (Including Homeless)

Enrollment data for the 2023-24 school year reveals that while 63% of our students are designed as socioeconomically disadvantaged (SED), 12.4% of students are also experiencing homelessness, which creates significant barriers to students' education and impedes their ability to thrive academically. A review of site-level data during this period highlighted the fact that students' most pressing educational needs continue to be access to school supplies for homework, reliable transportation to and from school, continuity in educational programs, and engaging extended-day opportunities. To address these challenges, we will leverage both school funds and donations from community partnerships to support identified students and their families with essential items such as food, clothing, shoes, school

transportation aid via bus passes, and basic school supplies. In addition to maintaining the two existing Family Resource Centers, plans are underway to open two additional centers to expand access to these critical services. By ensuring that these fundamental necessities are met, OCDE's school programs aim to promote regular school attendance among identified students, resulting in improved attendance rates, increased participation in class activities, reduced learning gaps, and enhanced achievement in reading and math as evidenced by local and State standardized assessments.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Recent enrollment and site-level data continue to highlight the impact of economic instability and homelessness on students' ability to fully engage in school. Efforts are focused on expanding access to essential resources and family supports that promote attendance, continuity of learning, and academic success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> Between July 2025 and December 2025, Title I Family Engagement staff provided essential support and resources to 285 families of ACCESS students who are homeless to promote student health and wellness and positive academic outcomes. Supports included housing navigation, connection to community resources, bus passes, backpacks, and school supplies. To reduce barriers to school attendance and support student academic achievement, three 	\$1,157,513	\$253,185

	<p>Family Connection Centers located at the ACCESS Skyview, San Juan, and Argosy sites provided over 400 students and their families with school supplies, emergency clothing, and hygiene items between July 2025 and December 2025. During this same period, the Centers' food pantries distributed 155,644 pounds of fresh produce and groceries to help address food insecurity for ACCESS families.</p> <ul style="list-style-type: none"> • Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 1 - Action 7: School-Based Mental Health Services

Feedback from parents, teachers, and students demonstrates a strong desire to enhance our school-based mental health services for students, with a particular focus on integrating physical activities to help alleviate stress. Students who are identified as socioeconomically disadvantaged (SED), foster youth, or those experiencing homelessness often struggle with heightened levels of anxiety and depression due to environmental instability issues beyond their control, and these obstacles frequently manifest in decreased academic performance stemming from increased absenteeism.

To support our students who experience these challenges, we have implemented a multi-tiered system of support, which includes incorporating physical fitness alongside a range of mental health services tailored to meet students' individual needs. Teachers note that students who participate in these support services demonstrate improved attendance, particularly on the days of their counseling sessions. We believe this trend contributes to a student's resiliency, fostering greater self-confidence and self-efficacy, leading to sustained attendance and academic achievement, especially among students who are SED, foster youth, or experiencing homelessness.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Student, family, and staff input continues to highlight the importance of accessible mental health and wellness supports within the school setting. Integrated approaches that combine counseling services with physical activity are intended to reduce stress, strengthen student resilience, and support improved attendance and academic engagement.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July through December 2025, ACCESS clinicians facilitated the implementation of a universal mental health screening process across all ACCESS community school sites. Through this initiative, clinicians identified student needs, assessed for suicidal ideation and other mental health indicators, and connected students to appropriate school-based mental health services and/or community resources. For students requiring more intensive and individualized support, ACCESS clinicians provided both group and individual counseling. On average, approximately 100 students per month received these targeted services within the community school setting. • To strengthen staff capacity in supporting students facing mental health challenges, ACCESS clinicians delivered refresher trainings for all school staff on suicide awareness, prevention, and response. Additional professional development sessions 	\$1,134,235	\$424,869

	<p>focused on Trauma-Informed Practices in Schools, recognizing mental health concerns, and understanding the referral process.</p> <ul style="list-style-type: none"> • From August through December 2025, Partners 4 Wellness (P4W) offered specialized workshops to students at five ACCESS sites. Classroom presentations addressed topics such as life skills, healthy relationships, decision-making, and social-emotional learning. In addition, P4W provided individualized short-term counseling for identified students, facilitated opportunities for community service, and ensured linkage to relevant community resources. • Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 1 - Action 8: Specialized Support Services for Successful Transitions

Students who are foster youth, socio-economically disadvantaged (SED), and/or English learners face significant challenges in their progress toward graduation due to frequent changes in school placements and housing arrangements, difficulty understanding how to navigate unfamiliar education systems, and limited access to essential resources like food, clothing, and transportation. To mitigate the systemic barriers, our schools will provide specialized staff to conduct thorough transcript audits, develop tailored education plans, prepare updates for juvenile court proceedings, and analyze graduation requirements. Through strategically targeted supports for our unduplicated student populations we will establish a clear path to academic success with a focus on student groups who are faced with additional barriers to achievement. These structured interventions will empower students and families to overcome obstacles in order to reduce the number of students who drop out and improve graduation rates by equipping them with the necessary skills and resilience for a successful transition into the community, post-secondary education, and the workforce.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Ensuring clear, attainable pathways to graduation remains critical for students facing significant mobility and access barriers. Targeted academic guidance and individualized planning are intended to support credit completion, reduce dropout risk, and improve graduation outcomes for unduplicated student groups.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • Between July 2025 and January 2026, ACCESS academic school counselors conducted over 335 Graduation Checks to validate student grade level accuracy and graduation projections, which allows for specific student support from support staff and teachers. • In the first half of the school year, academic school counselors participated in 525 enrollments of students into our ACCESS programs. Students meeting the school counselors at enrollment make a connection immediately to one of the many adults on campus to support student success. • Academic school counselors completed over 5,500 transcript evaluations for ACCESS students between July 2025 and January 2026 to determine 	\$2,128,492	\$1,007,911

	<p>progress toward graduation and academic next steps. Student support provided in areas of resources to assist the students on their path to high school completion and post-secondary readiness.</p> <ul style="list-style-type: none"> • Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 1 - Action 9: Mental Health Services for Students with Disabilities

Research shows that students with disabilities often experience complex mental health needs that require individualized, behaviorally focused interventions. Tailored support from school psychologists and trained mental health professionals significantly improves both student well-being and academic outcomes. Students with disabilities (SWD) enroll in OCDE school programs with diverse mental health needs that require thoughtful consideration and individualization. The nature and severity of the students' disabilities can significantly influence the efficacy of mental health interventions and their academic performance. A considerable number of SWD require highly specialized counseling services, often emphasizing behavioral strategies over cognitive approaches. These services will be delivered by school psychologists, behaviorally-trained mental health clinicians, and other licensed behaviorists who work for the school and are specifically trained to work with this unique population of students. Through a tailored approach to supporting the mental health needs of students with disabilities, student well-being and academic success will increase.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4, Student Achievement and Priority 5, Chronic Absenteeism/Graduation Rate, Priority 8, CCI/Student Outcomes
Metrics: 1.1, 1.5, 1.7, 1.9

Note: LREBG funds in the amount of \$338,869 were added to this action to provide additional resources to increase mental health services for students with disabilities. Research shows that mental health counselors and school psychologists help students overcome emotional, behavioral, and learning barriers through individualized support, assessments, and targeted interventions, creating a stable, inclusive environment for academic success. The metrics used to monitor the impact of this action are 1.1, 1.7, and 1.9. See Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Students with disabilities benefit from mental health supports that are responsive to the nature and complexity of their individual needs. Targeted, behaviorally informed services help promote emotional regulation, school engagement, and academic success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • Throughout the first six months of the 2025-26 school year, 127 students with IEPs received individualized and targeted special education services each month. • Funding continued for OCDE staff associated with this action. 	\$3,715,815	\$1,599,529

Goal 2

Goal Description

IMPROVE PUPIL OUTCOMES: Provide all students with the comprehensive supports and resources necessary to thrive both academically and interpersonally by creating learning environments and opportunities that are responsive to the diverse needs, backgrounds, and learning styles of every student.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Percentage of EL students making progress toward English language proficiency or maintaining the highest level attainable (ELPI).	OCDE: 18.5% ACC: 20.4% AJH: 4.6% OCCS: Data Not Available CONNECTIONS: 10.3% (Source: 2023 CA Dashboard, English Learner Progress Indicator-ELPI)	OCDE: 42% ACC: 42% AJH: 41% OCCS: Data Not Available CONNECTIONS: 18% (Source: 2024 CA Dashboard, English Learner Progress Indicator-ELPI)		OCDE: 38% ACC: 39% AJH: 36% OCCS: Not publicly reported due to small cohort size Connections: 13% (Source: 2025 CA Dashboard, English Learner Progress Indicator-ELPI)	OCDE: 30% ACC: 35% AJH: 15% OCCS: 60% CONNECTIONS: 15% (Source: CA Dashboard, English Learner Progress Indicator-ELPI)
2.2	Percentage of students who "Meet/Exceed" or "Nearly Meet" Standard on the ELA SBAC	OCDE All: 18.66% EL: 1.33% LTEL: 1.0% LI: 13.28% FY: 33.33% OCCS All: 74.4% Hisp: 63.6% LI: 59.5% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size	OCDE All: 43% EL: 17% LTEL: 19% LI: 38% FY: 8% OCCS All: 86% Hisp: 80% LI: 73% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size		OCDE All: 42% EL: 18% LTEL: 21% LI: 37% FY: 31% OCCS All: 82% Hisp: 72% LI: 73% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size	OCDE All: 50% EL: 25% LTEL: 25% LI: 50% FY: 25% OCCS All: 90% Hisp: 90% LI: 90% LTEL: 90% EL: 90% FY: 90% CONNECTIONS All/SWD: 20% LI: 18% LTEL: 18%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		<p>CONNECTIONS All/SWD: 8.6% LI: 5.7% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size</p> <p>(Source: DataQuest 2023 CAASPP Results)</p>	<p>CONNECTIONS All/SWD: 11% LI: 11% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size</p> <p>(Source: DataQuest 2024 CAASPP Results)</p>		<p>Connections All/SWD: 8% LI: 4% LTEL: Not publicly reported due to small cohort size EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size</p> <p>(Source: DataQuest 2025 CAASPP Results)</p>	<p>EL: 18% FY: 18%</p> <p>(Source: DataQuest CAASPP Results)</p>
2.3	Percentage of students who "Meet/Exceed" or "Nearly Meet" Standard on the Math SBAC	<p>OCDE All: 8.25% EL: 1.44% LTEL: 0% LI: 3.15% Hisp. 4.43% FY: Not publicly reporting due to small group size/confidentiality</p> <p>OCCS All: 57.9% Hisp: 40.5% LI: 37.8% EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size LTEL: Not publicly reported due to small cohort size</p>	<p>OCDE All: 20% EL: 5% LTEL: 6% LI: 13% Hisp. 12% FY: 0%</p> <p>OCCS All: 60% Hisp: 37% LI: 40% EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size LTEL: Not publicly reported due to small cohort size</p>		<p>OCDE All: 19% EL: 6% LTEL: 4% LI: 13% Hisp. 13% FY: 13%</p> <p>OCCS All: 59% Hisp: 43% LI: 40% EL: Not publicly reported due to small cohort size FY: Not publicly reported due to small cohort size LTEL: Not publicly reported due to small cohort size</p>	<p>OCDE All: 25% EL: 10% LTEL: 8% LI: 10% Hisp. 10% FY: 10%</p> <p>OCCS All: 80% Hisp: 70% LI: 70% EL: 70% FY: 70% LTEL: 70%</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: DataQuest 2023 CAASPP Results)	(Source: DataQuest 2024 CAASPP Results)		(Source: DataQuest 2025 CAASPP Results)	(Source: DataQuest CAASPP Results)
2.4	Percentage of ACCESS students scoring "on or above grade level" on the i-Ready Reading assessment	All: 20% EL: 6% LI: 11% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2023-24 Reading Results)	All: 13% EL: 5% LI: 11% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2024-25 Reading Results)		All: 23% EL: 5% LI: 18% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2025-26 Reading Results)	All: 37% EL: 20% LI: 20% FY: 20% (Source: i-Ready database, Reading Results)
2.5	Percentage of ACCESS students reflecting "on or above grade level" on the i-Ready Math assessment	All: 14% EL: 4% LI: 7% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2023-24, Math results)	All: 10% EL: 3% LI: 6% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality Source: i-Ready database, 2024-25, Math results		All: 17% EL: 4% LI: 14% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality Source: i-Ready database, 2025-26, Math results	All: 30% EL: 15% LI: 10% FY: 10% (Source: i-Ready database, Math Results)
2.6	Reclassification Rate (All EL Students/All ELPAC Levels)	3.3% of all English Learners were reclassified (RFEP)	5% of all English Learners were reclassified (RFEP)		Pending from ARC	6% of all English Learners were reclassified (RFEP)

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	Reclassification Rate (Eligible Students/ELPAC Level 4 Only)	71.4% of eligible/ELPAC Level 4 English Learners were reclassified (RFEP) (Source: Aeries database, 2023-24, RFEP count and Title III database/ELPAC Level 4)	59% of eligible/ELPAC Level 4 English Learners were reclassified (RFEP) (Source: Aeries database, 2024-25, RFEP count and Title III database/ELPAC Level 4)		% of all English Learners were reclassified (RFEP) % of eligible/ELPAC Level 4 English Learners were reclassified (RFEP) (Source: Aeries database, 2025-26, RFEP count and Title III database/ELPAC Level 4)	90% of eligible/ELPAC Level 4 English learners were reclassified (RFEP) (Source: Aeries database RFEP count and Title III database/ELPAC Level 4)
2.7	Percentage of high school graduates "Prepared" or "Approaching Prepared" as reflected on the Dashboard College and Career Indicator	Prepared or Approaching Prepared on the CCI Indicator: 6.9% (OCDE/LEA) CCI: PREPARED: OCDE: All: 2.2% EL: 0.5% FY: 2.4% Hisp: 1.3% HL: 0.4% LI: 1.0% SWD: 0.0% Wh: 0.6% ACC: All: 0.3% EL: 0.0% Hisp: 1.3% HL: 0.4% LI: 1.0% SWD: 0.0% Wh: 4.6% FY: 3.8% AJH: All: 1.0% EL: 2.9%	Prepared or Approaching Prepared on the CCI Indicator: % CCI: PREPARED: OCDE: All: 2% EL: 0% FY: 0% Hisp: 1% HL: 1% LI: 1% SWD: 1% Wh: 7% LTEL*: 0% ACC: All: 2% EL: 0% Hisp: 1% HL: 1% LI: 1% SWD: 0% Wh: 3% LTEL*: 0% FY: 0%		Prepared or Approaching Prepared on the CCI Indicator: % CCI: PREPARED: OCDE: All: 2% EL: 0.4% FY: 0% Hisp: 1.6% HL: 2% LI: 1.9% SWD: 0.7% Wh: 4% LTEL*: 0.5% ACC: All: 1.7% EL: 0% Hisp: 1.5% HL: 2.4% LI: 1.8% SWD: 0% Wh: 2.7% LTEL*: 0% FY: 0%	Prepared or Approaching Prepared on the CCI Indicator: 20% (OCDE/LEA) CCI: PREPARED: OCDE: All: 10% EL: 10% FY: 10% Hisp: 10% HL: 10% LI: 10% SWD: 10% Wh: 10% LTEL: 10% ACC: All: 8% EL: 8% Hisp: 8% HL: 8% LI: 8% SWD: 8% Wh: 8% LTEL: 8% FY: 8%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			Dashboard Additional Report)		(Source: 2025 CA Dashboard & Dashboard Additional Report)	
2.8	Percentage of 11th grade students demonstrating college readiness on the EAP assessment	English Language Arts (ELA): 5.1% Math: 1.8% (Source 2022-2023 DataQuest/CAASPP Results)	English Language Arts (ELA): 6% Math: 1% (Source 2023-2024 DataQuest/CAASPP Results)		English Language Arts (ELA): 5.8% Math: 1% (Source 2024-25 DataQuest/CAASPP Results)	English Language Arts (ELA): 10% Math: 10% (Source: DataQuest/CAASPP Results)
2.9	Percentage of graduating students meeting the a-g requirements	1.1% (Source: 2022-2023 CA Dashboard Additional Reports)	20% of the 2024 graduates met the A-G requirements. (Source 2023-2024 Dashboard Additional Reports)		21.4% of the 2025 graduates met the A-G requirements. (Source 2024-2025 Dashboard Additional Reports)	10% (Source: CA Dashboard Additional Reports)
2.10	Percentage of students completing both A-G and CTE sequence or program	All: 0.1% LI: 0% HL: 0% (Source: 2022-2023 CA Dashboard Additional Reports)	All: 0.1% LI: 0% HL: 0% (Source: Dashboard - 2024 Additional Reports)		All: 0.1% LI: 0% HL: 0% (Source: Dashboard - 2025 Additional Reports)	All: 5% LI: 3% HL: 3% (Source: CA Dashboard Additional Reports)
2.11	Number of CTE Pathways	3 CTE Pathways developed (Source: CTE program office/CALPADS Report #3.15/2022-2023)	4 CTE Pathways developed (Source: CTE program office/CALPADS Report #3.15/2023-2024)		4 CTE Pathways developed (Source: CTE program office/CALPADS Report #3.15/2024-2025)	8 CTE Pathways developed (Source: CTE program office/CALPADS Report #3.15)

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.12	The percentage of students passing Advanced Placement Exams	This metric is not applicable, as OCDE schools do not offer Advanced Placement (AP) courses.	This metric is not applicable, as OCDE schools do not offer Advanced Placement (AP) courses.		This metric is not applicable, as OCDE schools do not offer Advanced Placement (AP) courses.	Not Applicable
2.13	Percentage of pupils who have successfully completed courses that satisfy the requirements for career technical education sequences or programs of study that align with State Board of Education-approved career technical education standards and frameworks (CTE Completion Rate)	2.6% (Source: 2023 CA Dashboard Additional Reports)	1% (Source: 2024 CA Dashboard Additional Reports)		1% (Source: 2025 CA Dashboard Additional Reports)	10% (Source: CA Dashboard Additional Reports)
2.14	CA Dashboard: Science Indicator Results		New Required Metric/Baseline: All: 20.8 points below standard EL: 35.8 points below standard LTEL: 40.1 points below standard LI: 26.1 points below standard FY: Not publicly reporting due to small group size/confidentiality (Source: 2024 CA Dashboard/Information Purposes Report)		All: 29.9 points below standard EL: 25.1 points below standard LTEL: 25.9 points below standard LI: 27 points below standard FY: Not publicly reporting due to small group size/confidentiality (Source: 2025 CA Dashboard/Information Purposes Report)	All: 15 points below standard EL: 30 points below standard LTEL: 35 points below standard LI: 20 points below standard FY: 35 points below standard (Source: 2024 CA Dashboard/Information Purposes Report)

2024-25 LCAP Goal 2 and Actions - Implementation Update

Goal 2 - Action 1: Individualized Academic Support to Close Equity Gaps

Students enroll in OCDE school programs with varied academic challenges related to habitual truancy, drug use, chronic absenteeism, credit deficiencies, and behavioral and socioemotional gaps. For students facing these barriers, individualized support and attention is critical to their success, both academically and personally. Students who are English Learners, SED, or foster youth are even more significantly at risk of falling behind in school given the additional stressors and challenges placed upon them. Lack of language fluency, limited financial resources to access supplemental academic services, housing instability, and school transiency combine with other obstacles to inhibit their ability to equitably access the curriculum and become active participants in their educational journey. To address these educational needs, we will provide individualized academic support and tutoring for students to enhance access to the curriculum and increase scholastic achievement, which will principally benefit our unduplicated pupil groups for whom these specialized instructional services would not otherwise be possible or accessible. When students are able to experience success, attendance and behavior improve and they are able to take ownership of their academic path.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Equitable access to individualized academic support remains critical for students facing complex educational challenges. Focused tutoring and instructional interventions help reduce learning gaps, strengthen engagement, and support academic progress, especially for students who are English Learners, foster youth, and socioeconomically disadvantaged.</p> <p>Highlights:</p>	\$1,310,552	\$643,238

	<ul style="list-style-type: none"> • A specialist in the field of reading and literacy growth worked directly with ACCESS students for a total of 440 hours between July 2025 and January 2026 to enhance students' foundational reading skills, including decoding, fluency, vocabulary development and comprehension. • A specialist in the field of mathematics worked directly with students in ACCESS classrooms for a total of 235 hours between July and December 2025 to improve grade-level competency. • Students in the ACCESS community schools received 561 hours of in-person, individualized tutoring support by Title I Tutors from July 2025 to December 2025. • Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 2 - Action 2: College/Career Exploration Opportunities Principally Benefiting Students who are Low-Income/SED

Student and parent feedback reflects an interest in co-curricular activities to encourage higher education and career development. We will provide all students with access to extended learning opportunities related to college and career readiness. While provided to all, these actions principally benefit SED students by offering equitable access to career exploration, goal-setting, and job preparedness workshops that include resume writing, interview skills, and business attire, as well as assistance with college entrance and testing fees. We believe this to be an effective action towards our goals for these students, as increases in student attendance and engagement occur during these events, leading to overall increases in school attendance, engagement and student achievement.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Expanded co-curricular opportunities are supporting student engagement while building readiness for college and careers. These experiences provide equitable access to career exploration and postsecondary preparation, contributing to increased attendance and student achievement.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July to December 2025, Title I Transition Specialists provided robust college and career supports in the ACCESS community schools, including 14 classroom presentations and 21 field trips, while helping students achieve key milestones: 132 enrolled in college (including concurrent enrollment), 30 completed financial aid applications, 107 completed career assessments, 151 created resumes, 162 submitted job applications, 48 obtained employment, and 12 enrolled in job training. • Of the five, week-long career readiness events planned in 2025-26 for ACCESS students, three events were completed in October, November, and December, and the remaining two are calendared. All five events will be completed by the end of March 2026. 	\$468,187	\$169,853

	<ul style="list-style-type: none"> Recent field trips related to college and career readiness supported by LCAP Goal 2 - Action 2 include Laguna Hills Community Center College Fair, Golden West College Fair, Cal Poly Pomona - Foundry in a Box Metal Workshop and campus tour, Boys & Girls Club of Santa Ana – Career Panel, Chapman University – First Gen Experience Program and campus tour, Los Alamitos Starbase workshops, Irvine Valley College – campus tour and new IDEA building. Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 2 - Action 3: College/Career Exploration Opportunities for Students who are Foster Youth

Students and families who participate in extended learning activities demonstrate increased school engagement leading to improved student academic outcomes. We will provide ACCESS and Connections students who are foster youth, their support teams, and foster families with specifically designed opportunities that will empower them with an understanding of post-secondary pathways and resources specific to foster youth, which will lead to increased attendance, engagement, and college, career and civic readiness.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	Supporting students in foster care requires intentional opportunities that build connection, stability, and future	\$127,003	\$62,139

	<p>planning. Extended learning experiences focused on postsecondary awareness help promote engagement, attendance, and readiness for life beyond high school.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July through December 2025, OCDE Foster Youth Services Coordinating Program (FYSCP) provided college support services to 34 OCDE students in foster care and career support services to 19 OCDE students in foster care. FYSCP continues to ensure that the current 25 OCDE seniors in foster care are receiving continuous, comprehensive, tailored case management and/or direct educational services, including college and career supports. • FYSCP prioritized sharing critical resources on FAFSA completion and financial aid opportunities specifically designed for foster youth and equipped OCDE teams and other adult supporters with information on foster youth-friendly college programs and on-campus housing options, ensuring students have access to comprehensive support systems. • Between July 2025 and January 2026, FYSCP presented two college readiness workshops and three college tours to students in foster care who are enrolled in OCDE Schools. • In August 2025, with FYSCP providing ongoing 		
--	---	--	--

	<p>comprehensive assistance to support postsecondary readiness and continuity of care, five of nine OCDE Class of 2025 high school graduates in foster care enrolled into Orange Coast College and transitioned into their on-campus apartments.</p> <ul style="list-style-type: none"> • Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 2 - Action 4: Individualized Academic Support for Students who are Foster Youth in Group Homes/Short-Term Residential Therapeutic Programs (STRTP)

The Title I Program of the Orange County Department of Education receives federal funding to support the educational needs of foster youth in Orange County group homes/STRTPs. Students who are in the foster care system and reside in group home/STRTP placements have various academic barriers due to multiple school placements, truancy, credit deficiencies, drug abuse, health and behavioral needs, and challenging interpersonal dynamics. To address academic gaps, OCDE will provide individualized academic support and tutoring to students in the group home/STRTP to enhance access to the curriculum, increase scholastic achievement, and offer guidance and support to group home/STRTP staff to enrich their ability to assist in the academic development of the youth. When students are able to experience success, self-esteem, attendance, and behavior improves and they begin to take ownership of their academic futures.

In addition to the services that are provided by the Title I Program, OCDE's Foster Youth Services Coordinating Program (FYSCP) provides educational liaison services and support from Transition Educational Liaisons to strengthen the coordination of services for foster youth in group homes/STRTPs and to improve educational outcomes. FYSCP connects and communicates with school districts, child welfare agency, probation, and other collaborative partners to assist with school transitions, tracking education information, transferring education and health records, addressing education-related needs, and providing educational progress summaries for foster youth to court.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4, Student Achievement and Priority 5, Chronic Absenteeism/Graduation Rate, Priority 8, CCI/Student Outcomes
Metrics: 1.1, 1.5, 1.6, 1.7, 1.9

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Coordinated academic and transition supports continue to play a critical role in improving educational outcomes for students in foster care residing in group home and STRTP placements. Individualized academic assistance and cross-agency collaboration support stability, engagement, and progress toward academic success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> Students in Orange County group homes/STRTPs received 637 hours of direct, individualized, in-person academic tutoring support by Title I Tutors from July 2025 to December 2025. In the first semester of the 2025-26 school year, OCDE Foster Youth Services Coordinating Program (FYSCP) provided 2,144 services to 509 students in Orange County Short-Term Residential Therapeutic Programs (STRTP) and Orangewood Children and Family Center, including participation in school and child welfare meetings, education updates and reports to Child Welfare and Probation, college and career support services, education case management, reengagement, education intervention, school attendance, graduation support, school stability, school transition, and school transportation coordination. 	\$560,086	\$270,952

	<ul style="list-style-type: none"> Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 2 - Action 5: Academic Support for Students who are English Learners

Students who are English Learners (EL) enroll in OCDE's school programs with varied academic challenges due to language barriers and credit deficiencies. To address educational needs, academic support, including language acquisition programs, tutoring, EL curriculum, supplemental materials, educational technology, reading books, and literacy software specific to the needs of English Learners, will be provided to enhance access to the curriculum and increase scholastic achievement. In addition, specialized instructional staff will support teachers in the implementation of ELD standards for English learners, including professional development specifically designed for teachers to support students in the development of academic English. When students are able to experience success, attendance and behavior improves and they begin to take pride in their accomplishments and gain momentum on their educational journey, resulting in improved reclassification rates, English proficiency, and closing achievement gaps for English learners.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Students who are English Learners benefit from coordinated academic and language development supports that promote confidence and academic momentum. Increased access to targeted instruction and educator support strengthens engagement, English proficiency, and achievement.</p> <p>Highlights:</p>	\$1,270,244	\$495,147

	<ul style="list-style-type: none"> • From July 2025 through December 2025, English Learner students served in ACCESS community and institution schools received 4,160 hours of targeted tutoring support focused on English language development. This individualized and small-group support reinforced academic language skills, addressed instructional gaps, and ensured continued access to ELD instruction aligned with program goals and progress along reclassification pathways. • From July 2025 through December 2025, 15 ACCESS students successfully met state reclassification criteria and transitioned from English Learner to Fluent English Proficient (RFEP) status, marking a critical step toward full academic independence and expanded postsecondary opportunities by demonstrating readiness to engage independently in grade-level coursework without additional language support. • Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 2 - Action 6: Individualized Academic Support for Students who are Adjudicated

Students who are currently incarcerated or on Probation enter OCDE's school programs with varied academic challenges due to social-economic disadvantages, delinquency, truancy, drug use, chronic absenteeism, credit deficiencies, and interpersonal challenges. To address these barriers and support educational needs, we will provide

high-quality instruction and individualized academic assistance for adjudicated students to enhance access to the curriculum, increase scholastic achievement, and prepare students to re-enter society as engaged and productive members of their communities. When students are able to experience success, school participation and behavior improves, positive interpersonal relationships flourish, and they set personal goals for the future that lead to academic development and becoming contributing members of their communities.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Individualized instruction and academic supports are strengthening engagement and educational progress for students who are incarcerated or on probation. Improved access to the curriculum supports positive behavior, goal-setting, and successful reintegration.</p> <p>Highlights:</p> <ul style="list-style-type: none"> From July to December 2025, a specialized Title I Transition team serving the unique needs of students in ACCESS youth in care sites provided intensive college and career supports, including 66 classroom presentations and 6 field trips, supporting key transition outcomes: 83 students enrolled in ACCESS community schools, 213 returned to their comprehensive districts, 9 enrolled in college, 6 completed financial aid, 12 obtained employment, 272 completed career assessments, and 43 created resumes. Students in the OCDE Youth in Care schools 	\$7,454,327	\$3,123,696

	<p>received 215 hours of direct, individualized tutoring support by Title I Tutors from July 2025 to December 2025.</p> <ul style="list-style-type: none"> Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 2 - Action 7: Career Technical Education Opportunities for All Students, Including Students with Disabilities

Research shows that high-quality Career Technical Education (CTE) programs significantly improve graduation rates, employment outcomes, and postsecondary success for all students, including those with disabilities. When CTE includes individualized supports, project-based learning, and partnerships with community colleges, students gain both technical and employability skills essential for long-term college and career readiness. By creating a high-quality and sustainable Career Technical Education (CTE) program, all students, including students with disabilities in the Connections program, will be better prepared for college and career success. CTE staff will receive training that will allow them to develop career pathways, coordinate and implement additional career education courses, and work with community colleges around course articulation. Students will learn and practice professional/technical skills related to a career path through project-based learning, internships, work-based learning and industry certification. Students will also learn employability skills such as critical thinking, creativity and innovation, collaboration, and communication, with the longer-term goal of increasing college and career readiness and success.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4, Student Achievement and Priority 5, Chronic Absenteeism/Graduation Rate, Priority 8, CCI/Student Outcomes
Metrics: 1.1, 1.5, 1.7, 1.9

Note: LREBG funds in the amount of \$69,196 were added to this action to provide additional resources to increase Career Technical Education opportunities for all students, including students with disabilities. According to research and best practices, paraeducators in the Connections program support students by reinforcing CTE instruction, assisting with accommodations, and providing individualized help. They remove learning barriers, promote engagement, and offer valuable insights to help tailor academic and behavioral support. The metrics used to monitor the impact of this action

are 1.7 and 1.9. See Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Access to high-quality, inclusive Career Technical Education opportunities supports college and career readiness for a diverse range of learners. Coordinated pathways and skill-building experiences promote successful transitions beyond high school.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July 2025 to December 2025, 95 ACCESS students have completed a course with a grade of C or higher. CTE courses are designed to provide students with the academic and technical skills needed to pursue a specific career field, often including hands-on learning and industry-relevant experiences, ultimately preparing them for post-secondary education or direct entry into the workforce. • New CTE pathways and courses have been expanded to move toward offering two or more CTE courses per ACCESS Area. • Renovations of the culinary facilities at Harbor Learning Center South expanded to include industry-grade stainless steel countertops, shelving, 	\$765,570	\$118,431

	<p>sink, and a dishwasher.</p> <ul style="list-style-type: none"> • A five-year license for the Paxton Patterson platform was purchased for students at Rio Contiguo to provide hands-on, career exploration, and technical skills training through interactive CTE learning modules designed for diverse learners. These modules have been implemented to expand access to engaging, standards-based career education experiences that promote readiness for postsecondary education, training, and employment. • A virtual reality training model was purchased to provide ACCESS students with exposure to and training in the essential skilled trades utilizing a platform that is more effective, engaging, and equitable than traditional training methods. By leveraging this immersive learning and career development platform, our students are able to train and practice hands-on learning using any device or virtual reality headset. 		
--	--	--	--

Goal 2 - Action 8: Targeted Services to Support the Academic Development of Long-Term English Learners (LTELs)

Long-Term English Learners (LTELs) are English Learner students who have been enrolled in a school in the United States for six years or more and have not been reclassified as fluent English proficient due to ongoing challenges in acquiring the necessary literacy skills. OCDE schools will offer targeted services to support LTELs to ensure equity in education, recognizing that every student deserves to receive an engaging educational experience. By focusing on enhancing English proficiency and other necessary skills for comprehension and improved communication, students will

experience increased confidence and engagement in learning, leading to overall better outcomes, and prepare LTELs for college and career readiness, ensuring they have the language skills necessary for future success.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Addressing the unique needs of students who are Long-Term English Learners supports improved language acquisition and academic engagement, and enhanced instructional approaches promote engagement, academic progress, and readiness for college and career pathways.</p> <p>Highlights:</p> <ul style="list-style-type: none"> During the first half of the 2025–26 school year, LTEL supports were advanced through a focus on capacity building and instructional alignment. The EL Teacher Lead Team engaged in targeted training on effective LTEL practices, strengthened implementation of the adopted Designated ELD curriculum, and supported principals and teachers with relevant data to build awareness of LTEL students and inform instructional conversations. 	\$100,000	\$0

Goal 2 - Action 9: Advanced Technical Education to Close Equity Gaps

Creating advanced technical learning centers for ACC students will bridge the gap in educational opportunities by providing access to state-of-the-art resources and training facilities that the students may not otherwise have which will promote improved school attendance and academic achievement as students become increasingly engaged in exploring exciting new fields of study. The centers will empower all students, but particularly benefit students who are socioeconomically disadvantaged (SED) as they develop marketable skills and pursue rewarding careers in larger scale, modern facilities.

OCDE's advanced technical learning centers will serve as an avenue to economic stability for our unduplicated student groups by equipping them with in-demand technical skills and paving the way to higher-paying jobs that will improve their socioeconomic status and that of their families. The centers will also help address disparities in representation within technical fields. By supporting unduplicated student groups, they will promote diversity and inclusion in industries where these students are traditionally underrepresented, which benefits the students who are SED and enriches the workforce by bringing diverse perspectives and experiences to the industry. Mentorship, career counseling, and career networking opportunities at the centers will help students navigate the complexities of the technical job market, succeed in their chosen fields, secure better livelihoods and positively impact their communities. Empowering ACC students to achieve their full potential promotes equity and taps into a pool of talent and innovation that might otherwise go unnoticed, leading to more inclusive and prosperous communities where individuals from all backgrounds have the opportunity to thrive and contribute.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	Expanded access to advanced technical learning environments is strengthening student engagement, attendance, and academic achievement. These enhanced efforts provide meaningful pathways for skill development and career exploration, particularly supporting students who are socioeconomically disadvantaged.	\$707,795	\$648,905

	<p>Highlights:</p> <ul style="list-style-type: none"> • Contracts with ROP to offer high-quality career education for ACCESS students, preparing them with the knowledge and experience to graduate workforce-ready. Taught by industry-experienced instructors, students learn fundamental principles in the classroom and gain clinical experience through rigorous hands-on training in local businesses, offices, and work-sites. Students have confidently earned vital certifications and/or state licensures to meet the demands of current labor markets. 		
--	--	--	--

Goal 3

Goal Description

MAINTAIN CONDITIONS OF LEARNING: Provide all students with access to fully credentialed teachers, instructional materials that align with state standards, and facilities that are maintained in good repair so students have access to a broad course of study in safe environments that includes the implementation of California State Standards.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.1	Percentage of fully credentialed and appropriately assigned teachers as measured by the OCDE HR Credentialing Annual Audit	100% of teachers are fully credentialed and appropriately assigned as measured by the OCDE HR Credentialing Annual Audit in 23-24 (Source: 2023-2024, OCDE Human Resources)	96% of teachers are fully credentialed and appropriately assigned as measured by the OCDE HR Credentialing Annual Audit in 24-25 (Source: 2024-2025, OCDE Human Resources)		In Progress (Source: 2025-2026, OCDE Human Resources)	100% of teachers are fully credentialed and appropriately assigned as measured by the OCDE HR Credentialing Annual Audit (Source: OCDE Human Resources)
3.2	Percentage of OCDE students with access to Standards-Aligned Instructional Materials, as measured by Priority 1 (Basic Services) on the Local Indicator report	100% of students have access to standards-aligned instructional materials in the 23-24 school year (Source: 2024 CA Dashboard Local Indicator, Priority 1-Basic Services)	100% of students have access to standards-aligned instructional materials in the 24-25 school year (Source: 2025 CA Dashboard Local Indicator, Priority 1-Basic Services)		In Progress (2026 Dashboard Local Indicator, Priority 1-Basic Services)	100% of students have access to standards-aligned instructional materials as measured by Priority 1 (Basic Services) on the Local Indicator report (Source: CA Dashboard Local Indicator, Priority 1-Basic Services)
3.3	Percentage of OCDE facilities in "Good" Repair Measured by Facility Inspection Tool (FIT), reported in Priority 1 (Basic Services) on the Local Indicator	100% of OCDE facilities in "good" repair as measured by the Facility Inspection Tool (FIT) in the 23-24 school year	100% of OCDE facilities in "good" repair as measured by the Facility Inspection Tool (FIT) in the 24-25 school year		In Progress	100% of OCDE facilities in "good" repair as measured by the Facility Inspection Tool (FIT) reported in Priority 1 (Basic Services) on the Local Indicator

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2024 CA Dashboard Local Indicator, Priority 1)	(Source: 2025 CA Dashboard Local Indicator, Priority 1)		(Source: 2026 CA Dashboard Local Indicator, Priority 1)	(Source: CA Dashboard Local Indicator, Priority 1)
3.4	Percentage rate of Academic State Standards' implementation as measured by Priority 2 (Implementation of State Academic Standards) on the Local Indicator	100% implementation of required California Academic State Standards across all OCDE schools in the 23-24 school year. (Source: 2024 CA Dashboard Local Indicator, Priority 2 A and B)	100% implementation of required California Academic State Standards across all OCDE schools in the 24-25 school year. (Source: 2025 CA Dashboard Local Indicator, Priority 2 A and B)		In Progress (Source: 2026 CA Dashboard Local Indicator, Priority 2 A and B)	100% implementation of required California Academic State Standards across all OCDE schools. (Source: CA Dashboard Local Indicator, Priority 2 A and B)
3.5	Percentage of OCDE students with access to and enrollment in a broad course of study. The extent to which students have access to, and are enrolled in a broad course of study including courses described under EC sections 51210 and 51220(a)-(i), as applicable, including the programs and services developed and provided to unduplicated pupils and students with exceptional needs, as measured by Priority 7 (Access to a Broad Course of Study) on the Local Indicator	100% of OCDE students have access to and enrollment in a broad course of study. The extent to which students have access to and are enrolled in a broad course of study, including courses described under EC sections 51210 and 51220(a)-(i), as applicable, including the programs and services developed and provided to unduplicated pupils and students with exceptional needs in the 24-25 school year. (Source: 2024 CA Dashboard Local Indicator, Priority 7)	100% of OCDE students have access to and enrollment in a broad course of study. The extent to which students have access to and are enrolled in a broad course of study, including courses described under EC sections 51210 and 51220(a)-(i), as applicable, including the programs and services developed and provided to unduplicated pupils and students with exceptional needs in the 24-25 school year. (Source: 2025 CA Dashboard Local Indicator, Priority 7)		In Progress (Source: 2026 CA Dashboard Local Indicator, Priority 7)	100% of OCDE students have access to and enrollment in a broad course of study. The extent to which students have access to, and are enrolled in a broad course of study, including courses described under EC sections 51210 and 51220(a)-(i), as applicable, including the programs and services developed and provided to unduplicated pupils and students with exceptional needs (Source: CA Dashboard Local Indicator, Priority 7)

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.6	<p>Foster Youth: Average rating demonstrating the level of implementation of coordination of services for foster youth based on the CA Dashboard Local Indicator Rubric (out of a possible score of 5) measuring service program components for foster youth in OCDE schools:</p> <p>1 - Exploration and Research Phase</p> <p>2 - Beginning Development</p> <p>3 - Initial Implementation</p> <p>4 - Full Implementation</p> <p>5 - Full Implementation and Sustainability</p>	<p>23-24 school year average rating was 3.5 out of 5 on the 23-24 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation of the coordinated service program components for foster youth</p> <p>(Source: 2024 Local Indicator Report, Priority 10)</p>	<p>24-25 school year average rating was 4.6 out of 5 on the 23-24 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation of the coordinated service program components for foster youth</p> <p>(Source: 2025 Local Indicator Report, Priority 10)</p>		<p>In Progress</p> <p>(Source: 2026 Local Indicator Report, Priority 10)</p>	<p>An average rating of 5.0 out of 5.0 on the CA Dashboard Local Indicator Implementation Scale, reflecting full Implementation and Sustainability of the coordinated service program components for foster youth</p> <p>(Source: OCDE Foster Youth Services Program)</p>
3.7	<p>Average rating demonstrating level of implementation based on the CA Dashboard Local Indicator Rubric (out of a possible score of 5) measuring the provision of professional learning for teachers to support recently adopted academic standards and/or curriculum frameworks.</p> <p>1 - Exploration and Research Phase</p> <p>2 - Beginning Development</p> <p>3 - Initial Implementation</p> <p>4 - Full Implementation</p> <p>5 - Full Implementation and Sustainability</p>	<p>The 23-24 school year average rating was 3.4 out of 5 on the 23-24 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p>	<p>The 24-25 school year average rating was 3.6 out of 5 on the 24-25 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p>		<p>In Progress</p> <p>(Source: 2026 Local Indicator Report, Priority 2)</p>	<p>An average rating of 5.0 out of 5.0 on the CA Dashboard Local Indicator Implementation Scale, indicating Full Implementation and Sustainability in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2024 Local Indicator Report, Priority 2)	(Source: 2025 Local Indicator Report, Priority 2)			(Source: Local Indicator Report, Priority 2)
3.8	<p>Expelled Youth: Average rating demonstrating level of implementation based on the CA Dashboard Local Indicator Rubric(out of a possible score of 5) measuring service program components for expelled youth in OCDE schools:</p> <p>1 - Exploration and Research Phase</p> <p>2 - Beginning Development</p> <p>3 - Initial Implementation</p> <p>4 - Full Implementation</p> <p>5 - Full Implementation and Sustainability</p>	<p>The 23-24 school year average rating was 4.0 out of 5 on the 23-24 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p> <p>(Source: 2024 Local Indicator Report, Priority 9)</p>	<p>The 24-25 school year average rating was 4.3 out of 5 on the 24-25 CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p> <p>(Source: 2025 Local Indicator Report, Priority 9)</p>		<p>In Progress</p> <p>(Source: 2026 Local Indicator Report, Priority 9)</p>	<p>An average rating of 5.0 out of 5 on the CA Dashboard Local Indicator Implementation Scale, indicating a status between initial and full implementation in our progress toward providing professional learning for teachers to support recently adopted standards and/or curriculum frameworks.</p> <p>(Source: 2024 Local Indicator Report, Priority 9)</p>

2024-25 LCAP Goal 3 and Actions - Implementation Update

Goal 3 - Action 1: Facilities Maintenance

We will maintain our facilities in good repair, so that students may attend school in safe and welcoming environments. We will complete timely facility repairs and continue to complete monthly school safety reports to ensure all sites are in good repair. Funds set aside within this action include the cost to employ Facilities staff to repair and maintain school sites and school offices, supplies related to maintenance costs, and the costs for purchasing and operating vehicles for Facilities staff to use. Also included in this action are funds for Deferred Maintenance which allows for the periodic, more costly repairs necessary to maintain sites in good repair.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Students benefit from attending school in environments that are safe, clean, and well maintained. Continued investments in facilities maintenance and deferred repairs help ensure school sites remain in good repair.</p> <p>Highlights:</p> <ul style="list-style-type: none"> OCDE school facility work orders continue to be addressed in a timely manner by a team of skilled employees. From July 1, 2025 to January 10, 2026, a total of 1,142 work orders were received from OCDE schools with 1,066 completed for a completion rate of 93%. 	\$3,980,095	\$349,403

	<ul style="list-style-type: none"> Funding continued for OCDE staff associated with this action. 		
--	---	--	--

Goal 3 - Action 2: State Standard Curriculum with Fidelity and Integrity for All Students, including Students with Disabilities and students who are English Learners, Low-Income/SED, Foster Youth, and Homeless

Research shows that providing all students, including those who are English learners, foster youth, homeless, socioeconomically disadvantaged, or have disabilities, with access to a broad, standards-aligned curriculum, along with professionally trained educators, leads to improved academic achievement and positive prosocial behavior. Highquality instruction grounded in state standards helps ensure equity, engagement, and long-term student success. All students in our program, including Students with Disabilities and students who are English Learners, SED, foster youth, and homeless, have access to a broad course of study aligned to the California State Standards. We will continue to provide appropriately-assigned teachers and support staff with professional learning opportunities and resources to enhance instructional practices and implementation of standards-based content with fidelity and integrity. By providing this strong foundation, students will demonstrate improvements in academic skill-building and positive prosocial behavior.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4, Student Achievement and Priority 5, Chronic Absenteeism/Graduation Rate, Priority 8, CCI/Student Outcomes

Metrics: 1.1, 1.5, 1.7, 1.9

Note: LREBG funds in the amount of \$489,921 were added to this action to provide additional resources to increase staffing and materials in support of student academic achievement. Research supports this in that equipping educators with updated technology and AI tools enhances their ability to identify learning gaps, personalize instruction, and monitor progress in real time. Paraeducators provide targeted academic and behavioral support, helping students build skills and confidence through one-on-one and small group instruction. Hiring substitute staff during state testing allows teachers to maintain instructional focus while ensuring all students are tested on time in a calm environment. Together, these supports lead to more effective teaching, accurate assessment data, and improved student outcomes. The metrics used to monitor the impact of the action are 1.1, 1.5, 1.7, and 1.9. See Appendix G for additional information.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Standards-aligned instruction and professional learning continue to support equitable academic outcomes and positive student engagement.</p> <p>Highlights:</p> <ul style="list-style-type: none"> Curriculum and supplemental educational resources continue to be purchased and made available to staff, including online reading and math intervention subscriptions, adaptive reading resources, handwriting curriculum, AI tools, coding courses, and a dynamic learning management system. From July to December 2025, a specialist in the field of mathematics provided targeted professional development to ACCESS teaching staff in the use of the iReady Math intervention tool. Funding continued for OCDE staff associated with this action. 	\$47,039,692	\$18,957,893

Goal 3 - Action 3: Coordination of Services for Expelled Youth

In alignment with State Priority 9, through ongoing communication between OCDE and partnering school districts, we will continue to support youth who are expelled from their districts of residence. Child Welfare and Attendance staff will continue to share essential information pertaining to student academic progress and positive pro-social, and mental health development, in order to support these students as they successfully transition back to their district of residence or graduate from our program.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Supporting students during transitions following expulsion requires strong collaboration between schools and districts with continued communication and progress monitoring helping students remain engaged and successfully complete their educational pathways.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • Of the 41 expelled students who enrolled in the ACCESS program between July and December 2025, 25 are still enrolled, 14 were able to return to their home district, 1 graduated, and 1 moved out of the county. • Funding continued for OCDE staff associated with this action. 	\$134,492	\$63,614

Goal 3 - Action 4: Coordination of Services for Orange County Foster Youth

As a county office of education, OCDE is responsible for the coordination of services for foster youth across the county. We will continue to support the agencies providing direct services to Orange County students who are foster youth through ongoing consultation and communication between OCDE and collaborative partners. We will continue to offer trainings, liaison support, and case consultation, as well as, collaborate with child welfare/probation and local schools to improve coordination of services for foster youth. By providing countywide support, we will increase inter-agency coordination of essential student information pertaining to academic progress and positive pro-social and mental health development to ensure that these students are informed and empowered advocates for their individual needs and goals.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>As the coordinating agency, OCDE plays a key role in aligning services for students in foster care across Orange County. Continued collaboration with child welfare, probation, and school partners supports consistent communication and improved educational experiences.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • From July 2025 through December 2025, the OCDE Foster Youth Services Coordinating Program (FYSCP) has provided 6,946 services to 1,587 students in foster care countywide, including Early Education Services, Court Liaison Services and Staffing/Hearings, Education Updates and Reports to Child Welfare and Probation, Education Case Management, and Liaison Assistance. • Funding continued for OCDE staff associated with this action. 	\$847,546	\$551,829

Goal 3 - Action 5: Coordination of Services for Students who are Foster Youth Within OCDE Schools

Consistent with State Priority 10 (A - D), OCDE will continue to support students enrolled in ACCESS and Connections who are foster youth through ongoing communication between school staff and collaborative partners, including the juvenile court, to create an efficient system for transferring health and education records, develop a network of support for student academic progress, and promote positive pro-social and mental health development. To ensure that these students are informed and empowered to advocate for their individual needs, essential education-related information will

be shared with the OCDE foster youth team to ensure coordination of services and continuity of educational programming for the foster youth from the prior school to the subsequent school as they transition between school programs and minimize school placements. Foster youth in ACCESS and Connections schools will have access to transportation assistance, when needed, to remain in their school of origin.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Coordinated communication and information sharing help maintain educational continuity and stability for students in foster care enrolled in ACCESS and Connections programs, supporting smooth transitions and consistent access to services.</p> <p>Highlights:</p> <ul style="list-style-type: none"> From July 2025 through December 2025, the OCDE Foster Youth Services Coordinating Program (FYSCP), in partnership with ACCESS and Connections, provided 703 education-related services to 160 OCDE students who are in foster care, including Participation in School and Child Welfare Meetings, Education Updates and Reports to Educational Partners, College and Career Support Services, Education Case Management, Reengagement, Education Intervention, Graduation Support, School Stability, School Transition, School Transportation Coordination, and Liaison Assistance. 	\$796,149	\$409,825

	<ul style="list-style-type: none"> • An 11th-grade student in foster care at ACCESS William Lyon School successfully completed dual enrollment with Santiago Canyon College and enrolled in the Guardian Scholars Program. As a result, the student secured a \$500 scholarship to offset educational expenses. Although the student has since exited ACCESS, enrollment at Santiago Canyon College has been maintained. This outcome was achieved through coordinated collaboration among ACCESS William Lyon staff, the Foster Youth Services Coordinating Program (FYSCP), and Santiago Canyon College to support continuity of services and a successful postsecondary transition. • Funding continued for OCDE staff associated with this action. 		
--	--	--	--

Goal 3 - Action 6: Staff Professional Development to Principally Benefit Students who are English Learners, Low Income/SED, or Foster Youth

Input received from parents, staff, and educational partners reflects the importance of having a team of educators who understand the unique needs of students who are English Learners, including LTELs, SED, or foster youth, and who are able to meet those needs through a thoughtful and empathetic approach to problem-solving, collaboration, and experiential learning. Students in this unique population benefit when the educators who support them are provided with effective, relevant, timely, and targeted professional development, including related materials, resources, and educational technology. Students who are English Learners, including LTELs, SED, or foster youth face challenges specific to their circumstances, and targeted professional development for staff working with vulnerable students and marginalized populations is essential to improve instruction, strengthen attendance, and increase student achievement. Providing staff with time at conferences and workshops to learn about the needs of these identified student groups, explore best practices that build upon students' strengths, and collaborate with peers will enhance their ability to support

learning goals and bridge implementation gaps, resulting in improved outcomes for all students and principally benefit those who are English Learners, LTELs, SED, or foster youth.

This action is driven by our goals and the work of Differentiated Assistance in support of Priority 4

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<p>Ongoing, targeted professional development continues to strengthen instructional practices and collaboration among educators leading to improved student engagement, attendance and academic outcomes.</p> <p>Highlights:</p> <ul style="list-style-type: none"> From July through December 2025, Multilingual Student Services has conducted three EL Lead professional learning meetings totaling 18 hours, focused on strengthening English Learner progress and access to grade-level curriculum. Key topics included defining what qualifies a student as an English Learner, understanding program and reclassification requirements, analyzing ELPAC and Ellevation data to accurately identify and monitor students, and clarifying EL Lead roles to ensure consistent implementation across sites. Professional learning also emphasized the specific instructional supports English Learners need to access core content, build language proficiency, and strengthen systems of support for Long-Term 	\$502,062	\$3,724

	<p>English Learners.</p> <ul style="list-style-type: none"> • From July through December 2025, Multilingual Student Services facilitated five ELDA (English Learner Development Assistant) professional learning sessions (13 total hours) focused on strengthening student-centered supports for English Learners. These sessions supported tutors in deepening their understanding of English Learner needs, ELPAC and reclassification foundations, foundational literacy and language development, and effective instructional strategies that increase access to curriculum and support language growth. Professional learning also included review of student data and progress trends to ensure tutoring services are aligned to student needs, while collaborative activities promoted consistency and shared practices across ACCESS sites. • From July to December 2025, the ACCESS Family and Community Engagement team (FACE) participated in five professional learning team meetings totaling 19 hours. These meetings addressed topics such as mental health and wellness support for families, inclusive outreach strategies, lifting parent and student voice in school decision-making, and planning events and activities linked to learning. FACE staff also attended a variety of local collaborative meetings, trainings, and open house events to learn about new resources and best practices for supporting families of English Learners, low-income students, students experiencing homelessness, and systems-impacted 		
--	--	--	--

	<p>youth. These meetings included OCDE's Family and Community Partnership Network, FACE Community of Practice, HOPES Collaborative, Multilingual Consortium, and Community School Network.</p>		
--	--	--	--

Goal 4

Goal Description

IMPLEMENT THE EQUITY MULTIPLIER INITIATIVE FOR ACC: By Year 3, implement actions to close opportunity gaps and improve outcomes for students in the ACCESS County Community School (ACC) where high instances of school mobility and socioeconomically disadvantaged status can create barriers to success, particularly for those student groups that performed at the lowest level on any of the school's 2024 California Dashboard state indicators: ELA and Math (English Learners, Long-Term English Learners, Homeless, Low-Income, Students with Disabilities, and Hispanic students) Graduation Rate (English Learners, Long-Term English Learners, Foster Youth, Hispanic, Homeless, Low-Income, and Students with Disabilities, and White students), College and Career Indicator (English Learners, Long-Term English Learners, Foster Youth, Hispanic, Homeless, Low-Income, and Students with Disabilities), and Chronic Absenteeism (English Learners, Long-Term English Learners, Homeless, Hispanic, and Low-Income students). The school would like to note that there were no underlying issues in the credentialing, subject matter presentation, and retention of the school's educators.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
4.1	Percentage of ACC students assessed using i-Ready Reading assessment	All: 48.3% EL: 52.5% LI: 49.0% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2022-23 Final Diagnostic)	All: 72% EL: 78 % LI: 75% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality New Baseline/Student Groups (Lowest Performing) LTEL: tracking this data locally, however not publicly reporting due to small group size/confidentiality HL: tracking this data locally, however not publicly reporting due to small group size/confidentiality SWD: tracking this data locally, however not publicly reporting due to small group size/confidentiality Hisp: 72%		All: 56% EL: 62% LI: 61% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality LTEL: tracking this data locally, however not publicly reporting due to small group size/confidentiality HL: tracking this data locally; however, not publicly reporting due to small group size/confidentiality SWD: 61% Hispanic: 58%	All: 65% EL: 65% LI: 65% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality New Student Groups Added (Baseline Year) LTEL: N/A HL: N/A SWD: N/A Hisp: N/A (Source: i-Ready database Final Diagnostic)

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			(Source: i-Ready database, 2023-24 Final Diagnostic)		(Source: i-Ready database, 2024-25 Final Diagnostic)	
4.2	Percentage of ACC students assessed using i-Ready Math assessment (Note: i-Ready Math assessment is assigned to those students who are taking or need to take Math course(s) to complete their graduation requirements)	<p>All: 43.6% EL: 48.5% LI: 44.9% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: i-Ready database, 2022-23 Final Diagnostic)</p>	<p>All: 69% EL: 74% LI: 72% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>New Baseline/Student Groups (Lowest Performing) LTEL: tracking this data locally, however not publicly reporting due to small group size/confidentiality. HL: tracking this data locally, however not publicly reporting due to small group size/confidentiality SWD: tracking this data locally, however not publicly reporting due to small group size/confidentiality Hisp: 69%</p> <p>(Source: i-Ready database, 2023-24 Final Diagnostic)</p>		<p>All: 52% EL: 60% LI: 60% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality.</p> <p>LTEL: tracking this data locally; however, not publicly reporting due to small group size/confidentiality. HL: tracking this data locally; however, not publicly reporting due to small group size/confidentiality. SWD: 56% Hisp: 55%</p> <p>(Source: i-Ready database, 2024-25 Final Diagnostic)</p>	<p>All: 65% EL: 65% LI: 65% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality</p> <p>New Baseline/Student Groups (Low-Performing): LTEL: N/A Hisp: N/A HL: N/A SWD: N/A</p> <p>(Source: i-Ready database, Final Diagnostic)</p>
4.3	Percentage of Chronically Absent ACC students (All Grades)	<p>All: 57.1% EL: 63.1% LI: 63.8% FY: 65.4% HL: 68.2% Hisp: 57.9%</p>	<p>All: 58% EL: 62% LI: 59% FY: 71% HL: 61% Hisp: 58%</p>		<p>All: 56% EL: 61% LI: 57% FY: 76% HL: 66% Hisp: 57%</p>	<p>All: 40% EL: 40% LI: 40% FY: 40% LTEL: 40% HL: 40%</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2023 DataQuest)	New Baseline/Student Groups (Lowest Performing) LTEL: N/A (Source: 2024 DataQuest)		LTEL: N/A (Source: 2025 DataQuest)	Hisp: 40% (Source: DataQuest)
4.4	Percentage of ACC Students who achieve near or above standards on the CAASPP ELA Writing Performance Area	All: 50% EL: 13.7% LI: 30.2% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: 2023 CAASPP Results/DataQuest)	All: 42% EL: 23% LI: 39% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality New Baseline/Student Groups (Lowest Performing) LTEL: 24% HL: 51% SWD: 27% Hisp: 39% (Source: 2024 CAASPP Results/DataQuest)		All: 36% EL: 25% LI: 35% FY: Tracking this data locally; however, it may not publicly report due to small group size/confidentiality LTEL: 25% HL: 41% SWD: 28% Hisp: 34% (Source: 2025 CAASPP Results/DataQuest)	All: 60% EL: 25% LTEL: 30% LI: 40% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality LTEL: 30% HL: 60% SWD: 30% Hisp: 40% (Source: CAASPP Results/DataQuest)
4.5	Percentage of ACC Students who achieve near or above standards on the CAASPP ELA Research/Inquiry Performance Area	All: 29.9% EL: 49.6% LI: 58.1% FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality (Source 2023 CAASPP Results/DataQuest)	All: 64% EL: 49% LI: 62% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality		All: 61% EL: 47% LI: 61% FY: Tracking this data locally; however, it may not publicly report due to small group size/confidentiality HL: 63% SWD: 56%	All: 55% EL: 65% LTEL: 50% LI: 65% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality HL: 70% SWD: 70% Hisp: 65%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			New Baseline/Student Groups (Lowest Performing) HL: 69% SWD: 61% Hispanics: 60% LTEL: 42% (Source: 2024 CAASPP Results/DataQuest)		Hisp: 61% LTEL: 50% (Source: 2025 CAASPP Results/DataQuest)	LTEL: 45% (Source: CAASPP Results/DataQuest)
4.6	Percent of new ACC parent/guardians who attend a parent engagement opportunity within 30 calendar days of their child's enrollment	40% (Source: Title I Family Engagement Program, 2023-2024)	54% (Source: Title I Family Engagement Program, 2024-2025)		In Progress (Source: Title I Family Engagement Program, 2025-2026)	60% (Source: Title I Family Engagement Program)
4.7	(DASS/Alternative School) Percentage of ACC students reflected in the One Year 12th Grade Cohort Graduation Rate	All: 77% EL: 73% FY: 92% HL: 84% LI: 77% Hisp: 77.3% SWD: 81.8% Wh: 80.3% (Source: ACC CA Dashboard Additional Report/2023)	All: 74% EL: 73% FY: 77% HL: 81% LI: 73% Hisp: 72% SWD: 77% Wh: 75% New Baseline/Student Groups (Lowest Performing) LTEL: 75% (Source: ACC CA Dashboard Additional Report/2024)		All: 58% EL: 59% FY: 63% HL: 59% LI: 58% Hisp: 56% SWD: 64% Wh: 68% LTEL: 60% (Source: ACC CA Dashboard Additional Report/2025)	All: 80% EL: 80% FY: 95% HL: 90% LI: 80% Hisp: 80% SWD: 85% Wh: 85% LTEL: 80% (Source: ACC CA Dashboard Additional Report)
4.8	ACC Suspension Rate (Student Groups Performing at the Lowest Level)- Percentage of Students	All: 3.1% EL: 4.9% SWD: 4.7% LI: 3.3% (Source: 2023 CA Dashboard, Suspension Rate)	All: 2% EL: 4% SWD: 3% LI: 3%		All: 2% EL: 2% SWD: 2% LI: 2%	All: 2% EL: 3% SWD: 3% LI: 3%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			(Source: 2024 CA Dashboard, Suspension Rate)		(Source: 2025 CA Dashboard, Suspension Rate)	(Source: CA Dashboard, Suspension Rate)
4.9	Percentage of ACC EL students making progress toward English language proficiency or maintaining the highest level attainable (ELPI).	20.4% (Source: 2023 CA Dashboard, English Learner Progress Indicator-ELPI)	42% (Source: 2024 CA Dashboard, English Learner Progress Indicator-ELPI)		38% (Source: 2025 CA Dashboard, English Learner Progress Indicator-ELPI)	35% (Source: CA Dashboard, English Learner Progress Indicator-ELPI)
4.10	Percentage of ACC high school graduates "prepared" or "approaching prepared" as reflected on the CA Dashboard College and Career Indicator	CCI PREPARED All: 0.3% EL: 0.0% Hisp: 1.3% HL: 0.4% LI: 1.0% SWD: 0.0% Wh: 4.6% CCI: APPROACHING PREPARED 4.1% (Source: 2023 CA Dashboard and Dashboard Additional Reports)	CCI PREPARED All: 2% EL: 0% Hisp: 1% HL: 1% LI: 2% SWD: 0% Wh: 3% New Baseline/Student Groups (Lowest Performing) LTEL: 0% CCI: APPROACHING PREPARED 2% (Source: 2024 CA Dashboard and Dashboard Additional Reports)		CCI PREPARED All: 2% EL: 0% Hisp: 2% HL: 2% LI: 2% SWD: 0% Wh: 3% New Baseline/Student Groups (Lowest Performing) LTEL: 0% CCI: APPROACHING PREPARED 3% (Source: 2025 CA Dashboard and Dashboard Additional Reports)	CCI: PREPARED:: All: 8% EL: 8% Hisp: 8% HL: 8% LI: 8% SWD: 8% Wh: 8% LTEL: 8% CCI: APPROACHING PREPARED 10% (Source: CA Dashboard and Dashboard Additional Reports)
4.11	Percentage of ACC Students who achieve near or above standards on the CAASPP Math Concepts and Procedures Performance Area		New Metric / New Baseline (Lowest Performing): All: 16% EL: 6% LTEL: 4% HL: 18% LI: 14%		All: 14% EL: 7% LTEL: 7% HL: 15% LI: 12% SWD: 13% Hisp: 13%	All: 20% EL: 20% LTEL: 20% HL: 20% LI: 20% SWD: 20% Hisp: 20%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			SWD: 11% Hisp: 14% (Source: 2024 CAASPP Results/DataQuest)		(Source: 2025 CAASPP Results/DataQuest)	(Source: CAASPP Results/DataQuest)

2024-25 LCAP Goal 4 and Actions - Implementation Update

Goal 4 - Action 1: Creating Future-Ready Learning Environments in ACC

Creating future-ready classrooms for ACC students is crucial for ensuring equity and access to quality education, especially for low performing student groups. By devoting resources to implementing future-ready classrooms equipped with current technology, personalized learning tools, and innovative teaching methods, we can bridge the digital divide and empower these students with essential contemporary skills in research and writing. Preparing students for the future workforce requires OCDE schools to cultivate critical thinking, problem-solving abilities, and digital literacy, which can be facilitated through immersive learning experiences in modern classrooms using Artificial Intelligence (AI) tools and through projects such as podcasts and digital media arts. By investing in the advancement of educational infrastructure tailored to the needs of ACC students and educators, we will foster their potential to become active participants in their communities, thereby advancing social development and inclusive growth.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Investments in modern learning environments support instructional innovation and student engagement by providing technology-rich classrooms to help students develop the skills needed for future academic and career success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> Purchased two mobile e-sports cart gaming hubs to provide students with hands-on experience in digital media production, interactive design, and team-based competition. This equipment enables 	\$522,500	\$50,000

	<p>students to develop technical, creative, and collaborative skills aligned with the Information and Communication Technologies and Arts, Media, and Entertainment industry sectors.</p> <ul style="list-style-type: none"> • ACCESS is in the process of purchasing a mobile food trailer to expand equitable access to high-quality, industry-grade culinary instruction for students at ACCESS community school sites that lack kitchen facilities, creating future-ready learning environments and supporting hands-on CTE experiences that prepare students for postsecondary and workforce opportunities. The trailer will remove facility-based barriers that disproportionately impact our highest-need students and ensure they receive the same career pathway opportunities available at larger sites. • ACCESS is in the process of purchasing a truck to tow the mobile food trailer which will allow the culinary program to reach students at sites without kitchen facilities, providing equitable access to industry-relevant training and work-based learning experiences. • ACCESS is in the process of purchasing two transport vans to shuttle students between school sites to expand access to the diverse CTE and academic programs offered throughout ACCESS, which will remove barriers to participation, promote engagement and connect students to future-ready learning opportunities across the region. 		
--	---	--	--

Goal 4 - Action 2: Increasing Student Achievement Through Improved System Practices

To provide students in the ACC school with optimal learning environments where they receive an equitable distribution of evidence-based services and supports, OCDE must ensure the school has the foundational support necessary to operate effectively. However, the constantly evolving societal, technological, and educational landscapes of alternative education require new and innovative approaches in order to remain current, and the administrative services that support the framework of the school necessitate ongoing oversight and updates to ensure the efficacy of the educational program. New methods of addressing challenges such as daily staffing needs, equity considerations, and present-day cybersecurity concerns are essential to providing students, staff, and families with efficiently-managed, equity-centered, functional, and productive educational settings. To support feedback from ACC classroom staff and administrative offices, OCDE will employ new and improved practices to address staffing shortages and training for new staff. Additionally, educational partners, including parents, have expressed a need for additional supports to enhance school-family interaction, including increased clarity regarding the operation of the school program.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Strengthened administrative systems support effective, equitable school operations and positive learning environments.</p> <p>Highlights:</p> <ul style="list-style-type: none">During the first half of the year, OCDE began investing in upgraded digital communication systems for ACCESS school sites by purchasing LED lobby displays. These screens enhance school-family communication, increase visibility of school events and expectations, and promote a welcoming, student-centered environment that	\$129,712	\$3,108

	supports consistent messaging and engagement at school sites.		
--	---	--	--

Goal 4 - Action 3: Enhanced Collaborations to Introduce Expanded Services for Students

In alignment with the vision of the California Community Schools Partnership Program, enhanced collaborations with community partners will provide additional expanded learning opportunities to ACC students which are essential to the development of the whole child. Community partners are able to offer a diverse range of enrichment programs, advanced learning, community-based learning opportunities, vocational training, internships, mentorship opportunities, and wraparound services tailored to the specific academic needs and interests of alternative education students. These collaborations not only enrich the educational experience, but also build personal growth, resilience, and a sense of belonging within the community. By strengthening the ties between the school and the broader community, OCDE will promote mutual understanding, cooperation, and collective responsibility for the well-being and success of its ACC students. Together, we will create a more inclusive and supportive learning environment that empowers ACC students to thrive academically, socially, and professionally.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Strengthened community partnerships support whole-child development by expanding meaningful learning opportunities for ACC students where collaborative, community-based experiences enhance engagement, build connection, and support academic, social, and postsecondary success.</p> <p>Highlights:</p> <ul style="list-style-type: none"> During the first half of the year, ACC sites enhanced 	\$150,000	\$12,474

	<p>college-going culture by purchasing university and community college pennants to display throughout school environments. These visual partnerships reinforce postsecondary awareness, normalize higher education pathways for alternative education students, and support social-emotional development by building aspiration, belonging, and long-term goal setting aligned with ACC principles.</p> <ul style="list-style-type: none"> • To reduce barriers to family participation, ACC initiated the purchase of portable canopies and tables for use during school-hosted, outdoor family events. This investment supports equitable access for families who may lack event supplies, promotes inclusive community engagement, and strengthens school–family connections. 		
--	--	--	--

Goal 4 - Action 4: Expanding the Educational Team to Maximize Student Success

Expanding the educational team will allow OCDE to improve the academic achievement of ACC students by offering more tailored support and resources to address specific needs. The personalized support and guidance offered by additional, skilled OCDE team members, including academic coaching, collaborative problem-solving, and assistance in overcoming challenges that impede learning, will increase equity and student achievement. Greater availability of permanent staff will also allow for more individualized instruction leading to improved academic outcomes for students facing barriers to their learning by creating nurturing and supportive school environments where the students feel valued, empowered, and equipped to achieve their full potential.

Contributing?	Implementation Update	Total Funds	Mid-Year

		Budgeted	Expenditures
No	<p>Increased staff capacity enhances schools' ability to provide individualized instruction and academic supports that promote equity and improved student outcomes.</p> <p>Highlights:</p> <ul style="list-style-type: none"> OCDE continued to prioritize equity by funding additional instructional staff who provide targeted support to ACC students with the greatest academic needs. This sustained investment expands access to individualized instruction, helps address learning gaps, and supports students in progressing toward grade-level competency and graduation, particularly for those facing significant barriers to learning. 	\$1,796,027	\$529,707

Goal 5

Goal Description

IMPLEMENT THE EQUITY MULTIPLIER INITIATIVE FOR AJH: By Year 3, implement actions to close achievement gaps and improve outcomes for youth in care students who are enrolled in OCDE's ACCESS Juvenile Hall School (AJH) with a history of multiple school placements, irregular attendance in their comprehensive schools, and Adverse Childhood Experiences (ACE), contributing to a pattern of low academic achievement, particularly for those student groups that performed at the lowest level on any on the school's 2024 California Dashboard state indicators: College and Career Indicator and Graduation Rate: (English Learners, Long-Term English Learners, Hispanic, Homeless, Low-Income, and Students with Disabilities). The school would like to note that there were no underlying issues in the credentialing, subject matter presentation, and retention of the school's educators.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
5.1	Percentage of AJH students assessed using i-Ready Reading assessment	All: 70.9% EL: 77.5% LI: 77.4% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2022-23 Final Diagnostic)	All: 76% EL: 73% LI: 78% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2023-24 Final Diagnostic)		All: 63% EL: 71% LI: 79% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2024-25 Final Diagnostic)	All: 80% EL: 80% LI: 80% FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality (Source: i-Ready database Final Diagnostic)
5.2	Percentage of AJH students assessed using i-Ready Math assessment (Note: i-Ready Math assessment is assigned to those students who are taking or need to take Math course(s) to complete their graduation requirements)	All: 72% EL: 76.1% LI: 77.4% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2022-23 Final Diagnostic)	All: 84% EL: 84% LI: 88% FY: tracking this data locally; however not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2023-24 Final Diagnostic)		All: 72% EL: 80% LI: 87% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: i-Ready database, 2024-25 Final Diagnostic)	All: 80% EL: 80% LI: 80% FY: tracking this data locally; however may not publicly report due to small group size/confidentiality (Source: i-Ready database Final Diagnostic)
5.3	Percentage of AJH Chronically Absent students (All Grades)	All 10.6% EL: 8.2% LI: 10.6% FY: 29.5%	All 9% EL: 6% LI: 8% FY: 27%		All 11% EL: 8% LI: 11% FY: 24%	All: 8% EL: 6% LI: 8% FY: 10%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		(Source: 2023 DataQuest)	(Source: 2024 DataQuest)		(Source: 2025 DataQuest)	(Source: DataQuest)
5.4	Percentage of AJH Students who achieve near or above standards on the CAASPP ELA Writing Performance Area	<p>All: 10.8% LI: 11.1% EL: tracking this data locally, however not publicly reporting due to small group size/confidentiality FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2023 CAASPP Results/DataQuest)</p>	<p>All: 14% LI: 15% EL: 7% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality LTEL*: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2024 CAASPP Results/DataQuest)</p>		<p>All: 18% LI: 24% EL: 16% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality LTEL*: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2025 CAASPP Results/DataQuest)</p>	<p>All: 25% LI: 20% EL: tracking this data locally, however may not publicly report due to small group size/confidentiality FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality LTEL: Tracking this data locally, however may not publicly report due to small group size/confidentiality</p> <p>(Source: CAASPP Results/DataQuest)</p>
5.5	Percentage of AJH Students who achieve near or above standards on the CAASPP ELA Research/Inquiry Performance Area	<p>All: 54.1% LI: 52.8% EL: tracking this data locally, however not publicly reporting due to small group size/confidentiality FY: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2023 CAASPP Results/DataQuest)</p>	<p>All: 59% LI: 57% EL: 53% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality LTEL*: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2024 CAASPP Results/DataQuest)</p>		<p>All: 55% LI: 64% EL: 44% FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality LTEL*: tracking this data locally, however not publicly reporting due to small group size/confidentiality</p> <p>(Source: 2025 CAASPP Results/DataQuest)</p>	<p>All: 60% LI: 60% EL: tracking this data locally, however may not publicly report due to small group size/confidentiality FY: tracking this data locally; however, it may not publicly report due to small group size/confidentiality LTEL: Tracking this data locally, however may not publicly report due to small group size/confidentiality</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
						(Source: CAASPP Results/DataQuest)
5.6	(DASS/Alternative School) Percentage of AJH students reflected in the One Year 12th Grade Cohort Graduation Rate	All: 49% EL: 81% LI: 49% SWD: 90% Hisp: 52.9% HL: tracking this data locally; however, not publicly reporting due to small group size/confidentiality FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality (Source: AJH CA Dashboard Additional Report/2023)	All: 86% EL: 84% LI: 86% SWD: 79% Hisp: 89% HL: tracking this data locally; however not publicly reporting due to small group size/confidentiality FY: tracking this data locally; however not publicly reporting due to small group size/confidentiality New Baseline/Student Groups (Lowest Performing) LTEL: 84% (Source: AJH CA Dashboard Additional Report/2024)		All: 77% EL: 68% LI: 77% SWD: 80% Hisp: 78% HL: tracking this data locally; however, not publicly reporting due to small group size/confidentiality FY: tracking this data locally; however, not publicly reporting due to small group size/confidentiality LTEL: 77% (Source: AJH CA Dashboard Additional Report/2025)	All: 55% EL: 87% LI: 55% SWD: 92% Hisp: 58% HL: tracking this data locally; however may not publicly report due to small group size/confidentiality FY: tracking this data locally; however may not publicly report due to small group size/confidentiality LTEL: 87% (Source: AJH CA Dashboard Additional Report)
5.7	Percentage of AJH students making progress toward English language proficiency or maintaining the highest level attainable (ELPI).	4.6% (Source: 2023 CA Dashboard, English Learner Progress Indicator-ELPI)	41% (Source: 2024 CA Dashboard, English Learner Progress Indicator-ELPI)		38% (Source: 2025 CA Dashboard, English Learner Progress Indicator-ELPI)	15% (Source: CA Dashboard, English Learner Progress Indicator-ELPI)
5.8	Percentage of AJH graduates "prepared" or "approaching prepared" as reflected on the CA Dashboard College and Career Indicator	CCI: PREPARED All: 1.0% EL: 2.9% Hisp: 1.7% HL: 0.0% LI: 1.0%	CCI: PREPARED All: 0% EL: 0% Hisp: 0% HL: 0% LI: 0%		CCI: PREPARED All: 1% EL: 2% Hisp: 1% HL: 0% LI: 1%	CCI: PREPARED All: 5% EL: 5% Hisp: 5% HL: 5% LI: 5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		SWD: 0.0% CCI: APPROACHING PREPARED 0% (Source: 2023 CA Dashboard & Dashboard Additional Reports)	SWD: 0% New Baseline/Student Groups (Lowest Performing) LTEL: 0% HL: 0% CCI: APPROACHING PREPARED 0% (Source: 2024 CA Dashboard & Dashboard Additional Reports)		SWD: 0% LTEL: 3% HL: 0% CCI: APPROACHING PREPARED 0% (Source: 2025 CA Dashboard & Dashboard Additional Reports)	SWD: 5% LTEL: 5% CCI: APPROACHING PREPARED 5% (Source: CA Dashboard & Dashboard Additional Reports)

2024-25 LCAP Goal 5 and Actions - Implementation Update

Goal 5 - Action 1: Creating Future-Ready Learning Environments in AJH

Creating future-ready learning environments for youth in care enrolled in ACCESS Juvenile Hall school (AJH) is essential for students to successfully reintegrate into society and experience long-term success. OCDE recognizes that education plays a pivotal role in breaking the cycle of recidivism by equipping youth with the skills and knowledge needed to pursue positive pathways. To the extent possible in the restrictive environments, OCDE will provide improved, modern learning environments which will allow AJH students to gain greater access to current technology, Artificial Intelligence (AI), experiential learning opportunities, and career-focused education designed to meet the demands of the modern workforce and enhance their skills in research and writing. These opportunities will foster critical thinking, problem-solving, and digital literacy skills needed to navigate an increasingly complex world. Providing additional equitable opportunities to youth in care will promote personal growth, self-esteem, and a sense of purpose, increasing the likelihood of productive citizenship and positive outcomes.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Future-ready learning environments within juvenile facility settings support skill development, engagement, and successful reentry for students enrolled in AJH.</p> <p>Highlights:</p> <ul style="list-style-type: none"> A portion of the cost for a mobile food trailer (Goal 4 - Action 2) will be attributed to this action as the trailer, when purchased, will also expand equitable access to high-quality, industry-grade culinary instruction for students at AJH school sites that lack 	\$180,911	\$0

	<p>kitchen facilities, creating future-ready learning environments and supporting hands-on CTE experiences that prepare students for postsecondary and workforce opportunities.</p> <ul style="list-style-type: none"> To expand instructional capacity for students in AJH, OCDE purchased additional student laptops beyond baseline services. This investment enhanced opportunities for digital literacy within a secure environment, supporting equitable access to future-ready educational experiences for youth in care. 		
--	---	--	--

Goal 5 - Action 2: Increasing Student Achievement Through Improved System Practices for Youth in Care Settings

To ensure that AJH students receive the best possible education, regardless of length of enrollment, OCDE will prioritize creating learning environments tailored to their unique needs, including implementing expanded evidence-based services and supports that are equitable and accessible to all students to the greatest possible extent. The distinctive challenges faced by schools that operate in facilities for youth in care demand innovative approaches to education that can adapt to environments that change daily. The administrative services supporting the school must also be regularly updated to ensure the effectiveness of the educational program, particularly in areas such as staffing, equity, diversity, and cybersecurity. OCDE will enhance school-family interaction to support the educational journey of youth in care by offering additional supports to parents and guardians, such as increased clarity on school operations and advanced communication channels using digital resources.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures

No	<p>Adaptive systems and enhanced communication support equitable, responsive learning environments for students enrolled at AJH, ensuring continuity of instruction and meaningful engagement despite changing conditions.</p> <p>Highlights:</p> <ul style="list-style-type: none"> • A portion of Goal 5, Action 2 funding will support the purchase of CTE-related transportation equipment that brings hands-on, career-connected learning directly to AJH school sites. This approach expands equitable access to CTE by removing barriers associated with transporting youth in care off campus. 	\$40,000	\$0
----	---	----------	-----

Goal 5 - Action 3: Enhanced Collaborations to Introduce Expanded Services for Students

Enhanced collaborations with community partners play a crucial role in improving the educational attainment of youth in care by providing an expanded range of resources, support networks, and opportunities that extend beyond the confines of the facility in which they reside. These partnerships leverage the expertise, resources, and networks of community organizations, institutions of higher education, and businesses to create comprehensive educational programs tailored to the unique needs of students enrolled in AJH. By bringing diverse perspectives and resources to the AJH school program, OCDE will enrich the students' educational experience. Expanded collaborations with local colleges and vocational training programs will allow us to offer a broader range of educational pathways that align with the interests and goals of AJH students and bring a new diversity of educational opportunities which will increase engagement and motivation among students, leading to higher levels of educational attainment.

Through the expansion of community collaborations, OCDE will further facilitate the successful integration of youth in care back into society upon release by establishing connections with employers, housing providers, and social service agencies who offer specialized job training programs, mentorship initiatives, and additional support services to help the students successfully reintegrate into their communities and pursue further education or employment opportunities and empower AJH students to persevere in their educational pursuits despite challenges.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Community partnerships will expand educational pathways and reentry supports for students enrolled at AJH, promoting engagement, educational attainment, and successful transitions beyond the facility.</p> <p>Highlights:</p> <ul style="list-style-type: none"> OCDE expanded enrichment services at AJH by partnering with an external vendor to deliver interpersonal communication workshops. The workshop curriculum builds communication strategies and reflective skills that help students develop and amplify their voice, supporting self-advocacy, social-emotional growth, and readiness for successful reentry, postsecondary pathways, and workplace environments. 	\$331,120	\$42,147

Goal 5 - Action 4: Expanding the Educational Team to Maximize Student Success

The addition of staff to the AJH school teams will improve the educational outcomes of the youth in care students by increasing individualized support, expanding educational opportunities, improving classroom dynamics, enhancing program development, and facilitating the delivery of expanded support services. Addressing staffing shortages is crucial for maintaining a functional learning environment. OCDE will work to implement new, enhanced practices that incorporate feedback from AJH classroom staff, school administrative offices, and our county partners to better understand and address these shortages effectively. With extra school staff available, students will receive more personalized guidance and academic assistance, fostering an environment conducive to learning and encouraging

improved behavior in class. The presence of additional staff will allow for a wider range of educational programs and cocurricular activities tailored to student needs and interests, while the increased collaborative planning time among school staff and facility staff will lead to innovative teaching methods and engaging projects to further enhance the educational experience.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
No	<p>Increased staff capacity enhances the ability of AJH programs to provide individualized instruction, stable learning environments, and improved student outcomes.</p> <p>Highlights:</p> <ul style="list-style-type: none"> AJH strengthened instructional capacity by adding a new member to the educational team. This expansion supports increased individualized attention, improved classroom stability, and enhanced instructional support for youth in care, contributing to more consistent learning environments within a highly restrictive setting. 	\$110,640	\$59,103

Item: Information

☒ Mailed ☐ Distributed at meeting

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026

TO: Stefan Bean, Ed.D., Orange County Superintendent of Schools

FROM: Maria Martinez-Poulin, Ed.D., Chief of Alternative Education, ACCESS

SUBJECT: Mid-Year Update of the 2025-26 College and Career Preparatory Academy
Local Control and Accountability Plan

BACKGROUND:

Senate Bill 114 (2023) added Education Code 52068(a)(6) requiring a county office to present a report on the mid-year update to the Local Control and Accountability Plan (LCAP) on or before February 28 at a regularly scheduled meeting of the governing board or body of the LEA.

The report includes the following:

All available mid-year outcome data related to metrics identified in the current LCAP; and,

All available mid-year expenditure and implementation data on all actions identified in the current LCAP.

RECOMMENDATION:

Information item.

Monitoring Goals, Actions, and Resources for the 2025-26 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2025-26 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
College and Career Preparatory Academy	Fatinah Judeh Principal	fjudeh@ocde.us 714-796-8795

Goal 1

Goal Description

GOAL 1: ENGAGEMENT -

Provide all students with access to relevant programming, extracurricular activities, resources, and opportunities where they feel valued, respected, and supported and cared for both in and out of the classroom. Collaborate more efficiently with teachers, staff and educational partners to build a strong framework for student achievement and safe and supportive school climate that supports transition into career or post-secondary training.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	Attendance Rate	53% (baseline 2022-23)	55% (source: 2024-25 District data)		55% (source: current 2025-26 District data)	60%
1.2	Chronic Absenteeism Rate	87.6% (baseline 2022-23)	All students: 73.8% Socioeconomically Disadvantaged: 73.8% Homeless: 78.5% (source: 2023-24 DataQuest)		73.4% (source: 2024-25 DataQuest) All students: 73.4% Socioeconomically Disadvantaged: 73.4% Homeless: 90.3% (source: 2024-25 DataQuest)	All students: 65% Socioeconomically Disadvantaged: 65% Homeless: 68%
1.3	High School Graduation Rate CA Dashboard Combined Four- and Five-Year Grad Rate		All students: 66% English Learners: 63.6% Socioeconomically Disadvantaged: 65.7% Students with Disabilities: 82.8% Hispanic: 63.4% (source: 2023-24 CA Dashboard combined four- and five-Year Grad Rate)		All students: 56.5% English Learners: 41.2% Socioeconomically Disadvantage: 56.1% Students with Disabilities: 37% Hispanic: 55.9% (source: 2024-25 CA Dashboard combined four- and five-Year Grad Rate)	All students: 70% English Learners: 66% Socioeconomically Disadvantaged: 68% Students with Disabilities: 85% Hispanic: 66%
1.4	High School Graduation Rate Dashboard Alternative Status School (DASS) One-Year Grad Rate	All students: 86.7% (baseline 2022-23) English Learners: 82.4%	All students: 47.5% English Learners: 37.5% Socioeconomically Disadvantaged: 47.5%		All students: 47.5% English Learners: 33.3% Socioeconomically Disadvantaged: 48.2%	All students: 88% English Learners: 84% Socioeconomically Disadvantaged: 87%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		Socioeconomically Disadvantaged: 85.1% Students with Disabilities: 92.3% Hispanic: 87.5%	Students with Disabilities: 48.7% Hispanic: 42.9% (source: 2023-24 Dashboard Alternative Status School (DASS) One-Year Grad Rate)		Students with Disabilities: 23.5% Hispanic: 45.1% (source: 2025 Dashboard Alternative Status School (DASS) One-Year Grad Rate)	Students with Disabilities: 94% Hispanic: 89% Adjusted Targeted outcomes: All students: 49% English Learners: 39% Socioeconomically Disadvantaged: 49% Students with Disabilities: 49% Hispanic: 44%
1.5	Number of School Events	32 school events (baseline 2023-24)	34 school events (source: 2024-25 local data)		18 school events (source: 2025-26 local data)	38 school events
1.6	Local Data: Percentage of students receiving resources from Community Resource Specialist	8% of students (baseline 2023-24)	22% of students (source: 2024-25 local data)		18% of students (source: 2025-26 local data tracking)	50% of students
1.7	Local Data: Student Perception Connectedness "I feel connected to my school"	80.3% (baseline 2023-24)	79.6% (source: 2024-25 LCAP Student Survey)		not available (source: 2025-26 LCAP Student Survey)	90%
1.8	Pupil suspension rates	0% (baseline 2022-23)	0% (2023-24 Source: DataQuest)		0% (source: 2024-25 DataQuest)	0%
1.9	Pupil expulsion rates	0% (baseline 2022-23)	0% (2023-24 Source: DataQuest)		0% (source: 2024-25 DataQuest)	0%

LCAP Goal 1 and Actions - Implementation Update

Goal 1 - Action 1: Attendance and Student Engagement

Increase management staff to continuously review, develop and monitor the implementation of tiered re-engagement strategies and independent study requirements to increase student engagement and work completion. Classified staff will support the tiered re-engagement process.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Revised tiered re-engagement strategies Hired management staff to revise data collection for tiered re-engagement strategies Classified staff support teachers, and management with tiered re-engagement process Updated data tracking system for SIT meetings, follow-ups, along with updating procedures for Paraeducators and teachers to streamline process 	\$124,853.00	\$ \$51,671

Goal 1 - Action 2: Community Awareness and Visibility

Enhance CCPA's visibility through strategic marketing efforts to attract and engage potential students in the community to make aware of CCPA program and offerings.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Maintained CCPA's website Purchased digital marketing ads 	\$90,673.00	\$33,248

Goal 1 - Action 3: Family Engagement to Close Equity Gaps

Provide students and their families with transportation assistance, resources, and opportunities to participate in parenting workshops that offer students the knowledge necessary to navigate the educational system and to advocate for their and their families' needs. Additionally, coffee with the principal events are offered to encourage participation of parents of unduplicated pupils as well as parents of students with disabilities. Continue to communicate and collaborate with agencies within the community including federally-funded workforce partners, parents/families, and community agencies.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">Preparing for parenting/empowerment classes and workshops for students to attend	\$63,411.00	\$26,871

Goal 1 - Action 4: Extended Learning Opportunities

Provide all students with extended learning opportunities (college tours, career fairs, and community partner workshops, dual enrollment), including transportation options for students as needed.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">Expanded dual enrollment partnerships with additional colleges to provide more programming and pathways for studentsHosted College and Career Week including Financial Aid workshops from a community collegeHosted Open House for meet and greet with students and CCPA staff along with community partners to provide information and resources to studentsHosted Working Wardrobes events on site for studentsProvided additional staff support for CAJC enrollment daysPurchasing software to help streamline transcripts and diplomas processes to allow for students to obtain required documents to enroll in community college	\$44,181.00	\$17,636

Goal 1 - Action 5: Equitable access for graduation ceremony

Provide funding for graduation-related expenses (e.g., caps and gowns, venue rental) for historically underserved populations, ensuring all students can participate in the graduation ceremony to increase engagement, morale, and equitable access to celebration. Venue rental is included to secure a geographically central location that accommodates students and families from school sites across Orange County.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">• In process for finalizing contract for graduation venue• Purchased graduation gowns and supplies for December 2025 graduation.	\$6,500.00	\$1,071

Goal 2

Goal Description

GOAL 2: PUPIL OUTCOMES

Provide all students with a continuum of services that address academic, behavioral, social-emotional, health, and well-being needs, particularly for our lowest-performing student groups, socioeconomically disadvantaged students, and Hispanic students, to support their improved graduation rates.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Attendance Rates	53% (baseline 2022-23)	55% (source: current 2024-25 District data)		55% (source: current 2025-26 District data)	60%
2.2	High School Dropout Rate	30% (baseline 2022-23)	23% (source: 2023-24 local data)		not available (source: 2024-25 local data)	25%
2.3	Percent of pupils who have successfully completed courses that satisfy requirements for CTE sequences or programs of study that align with state board approved CTE standards and frameworks	3.6% (baseline 2022-2023: Source - CA Dashboard)	All students: 1.9% Socioeconomically Disadvantaged: 1.9% Homeless: 0% Hispanic: 1.4% English Learners: 0% (Source - CA Dashboard 2024)		4% (Source - CA Dashboard 2025) All students: 4% Socioeconomically Disadvantaged: 4.1% Homeless: 0% Hispanic: 4.3% English Learners: 5.9% (Source - CA Dashboard 2025)	All students: 5% Socioeconomically Disadvantaged: 5% Homeless: 4% Hispanic: 5% English Learners: 4% (Source - CA Dashboard 2024)
2.4	Local Data: Student Perception Connectedness "I feel connected to my school"	80.3% (baseline from 2022-23)	79.6% (source: 2024-25 LCAP Student Survey)		not available (source: 2025-26 LCAP Student Survey)	90%
2.6	Dual Enrollment Rate	21% (baseline 2023-24)	16.7% (source: 2024-25 local data)		11% (source: 2025--26 local data)	30%
2.7	Reclassification Rate	27.6% (baseline 2022-23)	28.2% (2023-24 Source: DataQuest)		31.0% (source: 2024-25 DataQuest)	30%
2.8	Percentage of English Learners who progressed at least one English Learner Progress Indicator (ELPI)	0% (baseline 2023)	28.6% (Source - CA Dashboard 2024)		36.5% (Source - CA Dashboard 2025)	5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.9	California Science Test	not available as fewer than 11 students tested (baseline; source: Data Quest, 2022-23)	All students: 7.14% Met or Exceeded Standard for Science Socioeconomically Disadvantaged: 5% Homeless: 0% Hispanic: 5.88% English Learners: not available as fewer than 11 students tested (source: 2023-24 DataQuest)		17.5% Met or Exceeded Standard for Science (source: 2024-25 DataQuest) All students: 17.5% Met or Exceeded Standard for Science Socioeconomically Disadvantaged: 19.35% Homeless: 9.09% Hispanic: 11.54% English Learners: not available as fewer than 11 students tested (source: 2024-25 DataQuest)	All students: 10% Met or Exceeded Standard for Science Socioeconomically Disadvantaged: 8% Homeless: 3% Hispanic: 8% English Learners: 3%
2.10	Local Data: Increase percentage of students who are re-assessed and show growth on the initial i-Ready Reading assessment	0% ; 0% (baseline 2022-23)	0% ; 0% (source: 2023-24 local data)		not available	15% ; 40%
2.11	Local Data: Increase percentage of students who are re-assessed and show growth on the initial i-Ready Math assessment	0% ; 0% (baseline 2022-23)	0% ; 0% (source: 2023-24 local data)		not available	15% ; 40%
2.12	Local Data: Tutor.com utilization rate	7% of students have utilized tutoring services (baseline 2023-24)	0.98% (source: 2024-25 local data tutor.com usage reports)		0% (source: 2025-26 local data tutor.com usage reports)	15%
2.13	Dashboard Data: CAASPP/SBAC performance data	ELA: Standard nearly met or Met or Exceeded - 51.51% Math: Standard nearly met or Met or Exceeded - 12.9% (Source: Data Quest, 2022-2023)	not available as fewer than 11 students tested (Source: Data Quest, 2023-2024)		not available as fewer than 11 students tested (source: Data Quest, 2024-2025)	ELA: Standard nearly met or Met or Exceeded - 56% Math: Standard nearly met or Met or Exceeded - 17%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.14	Percentage of pupils who have successfully completed courses that satisfy the requirements for entrance to the UC or CSU	0% (baseline 2022-23: Source - CA Dashboard)	0% (Source - CA Dashboard 2024)		0% (Source - CA Dashboard 2025)	1%
2.15	Extent to which pupils have access to and are enrolled in a broad course of study that includes all of the subject areas	100% (baseline 2023-24)	100% (source: 2024-25 local data)		100% (source: 2024-25 local data)	100%
2.16	High School Graduation Rate (Dashboard Alternative Status School (DASS) One-Year Grad Rate)	All students: 86.7% (baseline 2022-23) English Learners: 82.4% Socioeconomically Disadvantaged: 85.1% Students with Disabilities: 92.3% Hispanic: 87.5%	All students: 47.5% English Learners: 37.5% Socioeconomically Disadvantaged: 47.5% Students with Disabilities: 48.7% Hispanic: 42.9% (source: 2023-24 Dashboard Alternative Status School (DASS) One-Year Grad Rate)		All students: 47.5% English Learners: 33.3% Socioeconomically Disadvantaged: 48.2% Students with Disabilities: 23.5% Hispanic: 45.1% (source: 2025 Dashboard Alternative Status School (DASS) One-Year Grad Rate)	All students: 88% English Learners: 84% Socioeconomically Disadvantaged: 87% Students with Disabilities: 94% Hispanic: 89% Adjusted Targeted outcomes: All students: 49% English Learners: 39% Socioeconomically Disadvantaged: 49% Students with Disabilities: 49% Hispanic: 44%
2.17	The percentage of pupils who have successfully completed both CTE and requirements for entrance to UC or CSU	0% (Source: CA Dashboard 2023)	0% (source: CA Dashboard 2024)		0% (source: CA Dashboard 2025)	1%

LCAP Goal 2 and Actions - Implementation Update

Goal 2 - Action 1: Increase Services to Support Student Achievement

Increase staff and services to include individualized triaged resources to support adult student well-being for student achievement. This action will be focused primarily on low income, English learner and foster youth in order to provide resources including a wellness clinician and targeted academic support to close achievement gaps.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Revised clinician referral system Community Resource Specialist refers students to community agencies for additional resources Provided pantry items to students as requested including food, hygiene kits, and clothing 	\$49,670.00	\$26,280

Goal 2 - Action 2: Tiered Interventions to provide resources

Create MTSS Tiered Intervention matrices to address individualized triaged resources that only a licensed clinician could provide.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Clinician provided services to students Provided students with access to mental-health and wellness events during College and Career Week and Open House Community Resource Specialist refers students to community agencies for additional resources Leveraged wellness event at Open House to build staff capacity in providing resources to students 	\$49,170.00	\$23,670

Goal 2 - Action 3: Instructional and Behavioral Support

Continue to provide instructional and behavioral interventions and support services to address the critical needs of all students in order to effectively define a clear path to educational attainment and transition into the community, secondary education, and the workforce.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">• Purchased diagnostic assessments and curriculum to address student needs• Provided paraeducator support in attendance interventions• Provided tutoring support through online tutoring service tutor.com• Provided individualized instructional support through academic coaching• Provided funding to ELACs to support EL success	\$48,034.00	\$21,690

Goal 2 - Action 4: Implement a Multi-Tiered System of Support (MTSS)

Implement a Multi-Tiered System of Support (MTSS) that begins at enrollment and addresses the academic and social-emotional needs of all adult students, particularly unduplicated pupils (UPs), as they progress through the program and continue after graduation. This action is designed to meet the unique challenges faced by low-income, English learner, and foster youth students who may experience barriers to educational success, such as transportation, housing insecurity, and family responsibilities. As part of this system, CCPA will develop and implement a reduced credit diploma pathway for students aged 19 and over, recognizing the unique needs of adult learners who are re-engaging with school while balancing work, family, and interrupted education histories. This pathway is an equity-focused strategy to remove barriers to graduation and is embedded within the MTSS framework to ensure targeted, tiered supports are provided based on individual student needs. The Community Resource Specialist will dedicate time to support students with disabilities, ensuring they have access to appropriate resources and services aligned with their IEP goals. This action will focus primarily on unduplicated pupils (UPs), ensuring that the supports provided address their specific challenges and foster academic growth.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">Implemented additional pathway for students 19 - 25 to earn a diploma with a reduced credit pathway of 155 creditsProvided students with various school supplies to support student achievement from enrollment to graduationProvided chromebooks to all students upon enrollmentProvided hot-spots for students as neededProvided counselor support in reviewing student's pathways for graduation	\$182,143.00	\$90,091

Goal 3

Goal Description

GOAL 3: CONDITIONS OF LEARNING

Provide all students with access to a federally funded workforce partner, fully credentialed teachers, instructional materials that align with state standards, and facilities that are maintained in good repair so students have access to a broad course of study in safe environments that includes the implementation of California State Standards.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.1	Attendance Rates	53% (baseline 2022-23)	55% (source: current 2024-25 District data)		55% (source: current 2025-26 District data)	60%
3.2	Chronic Absenteeism Rate	87.6% (baseline 2022-23)	All students: 73.8% Socioeconomically Disadvantaged: 73.8% Homeless: 78.5 (source: 2023-24 DataQuest)		73.4% (source: 2024-25 DataQuest) All students: 73.4% Socioeconomically Disadvantaged: 73.4% Homeless: 90.3% (source: 2024-25 DataQuest)	All students: 65% Socioeconomically Disadvantaged: 65% Homeless: 68%
3.3	High School Dropout Rate	30% (baseline 2022-23)	23% (source: 2023-24 local data)		not available	to be determined in 2024-25
3.4	Local data: Student feels prepared for future college and/or career paths	91% (baseline 2023-24)	91.8% (source: 2024-25 LCAP Student Survey)		not available (source: 2025-26 LCAP Student Survey)	95%
3.5	Local Data: Student Perception of School Safety "I feel safe while at school"	94.4% (baseline 2023-24)	89.8% (source: 2024-25 LCAP Student Survey)		not available (source: 2025-26 LCAP Student Survey)	98%
3.6	Local Data: Student Perception Connectedness "I feel connected to my school"	80.3% (baseline 2023-24)	79.6% (source: 2024-25 LCAP Student Survey)		not available (source: 2025-26 LCAP Student Survey)	90%
3.7	Access to and enrollment in a broad course of study (CalPads Elective Course Completion: Credits Attempted)	100% (baseline 2023-24)	100% (source: 2024-25 local data)		not available	100%
3.8	Fully Credentialed and Appropriately Assigned Teachers	100%	100% (source: (2024-25 local data)		100% (source: (2025-26 local data)	100%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.9	Access to curriculum that is aligned with the CA State Content Standards to meet graduation, college and career requirements	100%	100% (source: (2024-25 local data)		100% (source: 2025-26 local data)	100%
3.10	Facilities in "Good" Repair as Measured by Facility Inspection Tool (FIT)	Exemplary (baseline 2023-24)	Exemplary (Source: 2024-25 SARC report)		Exemplary (source: 2025-26 SARC report)	Exemplary
3.11	Local Data: Tutor.com utilization rate	2.7% of students have utilized tutoring services (baseline 2023-24) Subgroups: 2.4% low-income 0.91% English learner 0% foster youth pupils	0.98% (source: 2024-25 local data tutor.com usage reports)		0% (source: 2025-26 local data tutor.com usage reports)	10% Subgroups: 5% low-income 5% English learner 0.25% foster youth pupils
3.12	High School Graduation Rate (Dashboard Alternative Status School (DASS) One-Year Grad Rate)	All students: 86.7% (baseline 2022-23) English Learners: 82.4% Socioeconomically Disadvantaged: 85.1% Students with Disabilities: 92.3% Hispanic: 87.5%	All students: 47.5% English Learners: 37.5% Socioeconomically Disadvantaged: 47.5% Students with Disabilities: 48.7% Hispanic: 42.9% (source: 2023-24 Dashboard Alternative Status School (DASS) One-Year Grad Rate)		All students: 47.5% English Learners: 33.3% Socioeconomically Disadvantaged: 48.2% Students with Disabilities: 23.5% Hispanic: 45.1% (source: 2025 Dashboard Alternative Status School (DASS) One-Year Grad Rate)	All students: 88% English Learners: 84% Socioeconomically Disadvantaged: 87% Students with Disabilities: 94% Hispanic: 89% Adjusted Targeted outcomes: All students: 49% English Learners: 39% Socioeconomically Disadvantaged: 49% Students with Disabilities: 49% Hispanic: 44%
3.13	Dual Enrollment Rate	21% (baseline 2023 - 24)	16.7% (source: 2024-25 local data)		11% (source: 2025--26 local data)	30%

LCAP Goal 3 and Actions - Implementation Update

Goal 3 - Action 1: Tiered reengagement strategies and forms

Increase management staff to continuously review, develop, and monitor tiered re-engagement forms and strategies regularly to ensure independent study compliance.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Implemented tiered reengagement strategies to best meet the needs of students 	\$48,061.00	\$19,152

Goal 3 - Action 2: Partner with Community Colleges

Expand partnerships with Community Colleges to provide students with access to dual enrollment opportunities at enrollment. Implement post career assessment upon completion of CCPA diploma program.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none"> Provided all students access to courses that meet the UC or CSU requirements Purchased online learning management system to provide students with career assessments Hired short-term instructors to support CAJC students in earning a school diploma in compliance with program requirements of dual enrollment with CCPA and Long Beach City College Expanded student enrollment within dual enrollment partnerships to provide more programming and pathways for students Provided financial aid workshops for students during college and career week 	\$55,730.00	\$24,834

Goal 3 - Action 3: Curriculum

Continue to incorporate curriculum adoption plans, focused on core academic areas, CTE, and electives, that integrate a high level of cultural relevancy in curricular options for English Learners (ELs) and Long-Term English Learners (LTELs). This will ensure that these students receive consistent support through ELD curriculum, with a focus on language acquisition. To support these efforts, ELs and LTELs will be ELPAC tested regularly to assess their language proficiency. The results will guide the use of ELD curriculum to track and measure growth in language acquisition, ensuring targeted and effective support for all students.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">• Purchased new online learning management system, Subject.com, to provide students with online class curriculum that is aligned with adopted academic content and performance standards• Provided students with academic support and tutoring as needed	\$78,705.00	\$88,598

Goal 3 - Action 4: Site Improvements and School Safety

We will continue to conduct site improvements and provide safe school environments conducive to learning for all students, which include updating furniture, providing safety training for staff, maintaining monthly safety reports and completing timely facility repairs.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">• Purchased new furniture for classrooms and sites• Provided staff with professional development opportunities in safety and other areas	\$500.00	\$1,484

Goal 3 - Action 5: Staff Development

Provide professional learning opportunities for staff to enhance instructional practices in standards-based content and interventions for English Learners (ELs) and Long-Term English Learners (LTELs), through PLCs with the support of the ELD Lead Teacher. This will be guided by data and strategies to ensure effective language acquisition and academic growth for these students.

Contributing?	Implementation Update	Total Funds Budgeted	Mid-Year Expenditures
Yes	<ul style="list-style-type: none">• Staff have attended ACCESS and CCPA All-Staff meetings• All staff have been trained on Subject.com curriculum• Staff have participated in workshops and trainings on compliance, MTSS, and staff development, and are scheduled for independent study compliance training and computer use in education trainings.	\$13,650.00	\$6,314

Impact to the Budget Overview for Parents

Item	As adopted in Budget Overview for Parents	Mid-Year Update
Total LCFF Funds		
LCFF Supplemental/Concentration Grants		

Item: Information

☒ Mailed ☐ Distributed at meeting

ORANGE COUNTY BOARD OF EDUCATION

BOARD AGENDA ITEM

DATE: February 2, 2026
TO: Renee Hendrick, Deputy Superintendent
FROM: David Giordano, Associate Superintendent, Administrative Services
SUBJECT: Education Code Section 1302 Information

BACKGROUND:

In order to recruit and retain high quality candidates for positions within the organization, the Department has prided itself in maintaining a competitive salary and benefits package. Accordingly, the Department has made efforts to remain competitive with total compensation among similar Orange County school districts and county offices.

In accordance with Education Code Section 1302 and Board Policy 100-10, attached is information for all employees who will receive a salary increase of more than \$10,000 in a 12-month period since we last reported in October 2025. The \$10,000 limit was set in statute in 1999 and has not been adjusted since October 2024.

RECOMMENDATION:

Receive the Education Code Section 1302 information for all employees who will receive a salary increase of more than \$10,000 in a 12-month period.

COORDINATOR, EDUCATIONAL SERVICES	\$ 20,947.32
PROJECT LIAISON, EARLY CHILDHOOD EDUCATION	\$ 18,144.00
DIRECTOR, SPECIAL EDUCATION	\$ 17,865.12
SR. ADMINISTRATOR, STUDENT SERVICES	\$ 17,577.24