

GREAT VALLEY ACADEMY
Regular Meeting of the Board of Trustees
Monday August 2, 2021
4:30 pm ~via Zoom

This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.

The Board of Directors ("Board") and employees of Great Valley academy shall meet via Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at

<https://us02web.zoom.us/j/87015171595?pwd=YmN3NGRPMUdmcHVjVVdNKzVkWkpKZz09>

You may also call in using the Zoom phone number +1 669 900 6833 US Meeting ID 87015171595. Members of the public who wish to comment during the Board meeting may email in comments to publiccomment@greatvalleyacademy.com and they will be read during the public participation segment of the meeting. Comments must be received by 12:00 p.m. on the day of the meeting. Members of the public calling in will be given the opportunity to address the Board during the public participation segment of the meeting. Individual comments will be limited to three (3) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Access to Board Materials: You may request a copy of the written materials submitted to the Board by sending a request to publiccomment@greatvalleyacademy.com.

Disability Access: A copy for disability-related modifications or accommodations to participate in this public meeting should be made at least 24 hours prior to the meeting by emailing publiccomment@greatvalleyacademy.com. Efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

AGENDA

- a. CALL TO ORDER**
- b. COMMUNICATIONS**
 - a. PUBLIC PARTICIPATION**
- c. APPROVAL OF AGENDA AND ORDER OF AGENDA**

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

d. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of June 14, 2021

e. PUBLIC HEARING

- 1. Public Hearing Independent Study Policies Open

Public Hearing: No earlier than: 4:30 p.m.

In accordance with Section 11701 of Title 5 of the California Code of Regulations, setting policy pursuant to Education Code section 51747, the Board shall consider, in a public hearing, the scope of its existing or prospective use of independent study as an instructional strategy, its purposes in authorizing independent study, and factors bearing specifically on the maximum realistic lengths of assignments and acceptable number of missed assignments for specific populations of pupils or adult education students. This policy shall reflect an awareness that excessive leniency in its terms can result in pupils falling so far behind their age peers as to increase, rather than decrease, the risk of their dropping out of school.

f. ACTION ITEMS

- a. Approval of Policy 2021.059 Short Term Independent Study Policy
- b. Approval of Policy 2021.060 Home Study Independent Study Policy
- c. Updated COVID Safety Plan

g. FUTURE AGENDA ITEMS

- a. **FUTURE REGULAR BOARD MEETINGS** – August 30, 2021
~4:30 pm Via Zoom

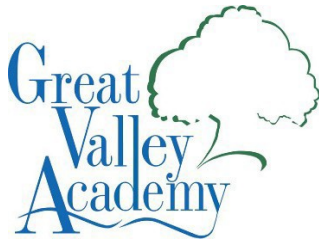
h. FINAL ADJOURNMENT

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

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Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.



NOTICE OF PUBLIC HEARING

Great Valley Academy hereby gives notice that a public hearing will be held as follows:

TOPIC OF HEARING

In accordance with Section 11701 of Title 5 of the California Code of Regulations, setting policy pursuant to Education Code section 51747, the Board shall consider, in a public hearing, the scope of its existing or prospective use of independent study as an instructional strategy, its purposes in authorizing independent study, and factors bearing specifically on the maximum realistic lengths of assignments and acceptable number of missed assignments for specific populations of pupils or adult education students. This policy shall reflect an awareness that excessive leniency in its terms can result in pupils falling so far behind their age peers as to increase, rather than decrease, the risk of their dropping out of school.

MEETING DETAILS:

Date: Monday August 2, 2021

Time: 4:30 p.m.

Location: Via Zoom

<https://us02web.zoom.us/j/87015171595?pwd=YmN3NGRPMUdmcHVjVVdNKzVkWkpKZz09>

Process for Making Public Comments: Members of the public are encouraged to submit comments via email at publiccomment@greatvalleyacademy.com. Comments must be received by noon (12:00 p.m.) on the day of the public hearing..

**GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
June 14, 2021**

MINUTES

Members Present: Yolanda Meraz, Twila Tosh, Susan Nisan, Chad Wolf

Members Absent: Steve Payne, Vince Jamison

Great Valley Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Christine Frost, Kelli Rupe

Audience Present: None

Call to Order: Mrs. Meraz called the meeting to order at 4:36 p.m.

Communications: **COMMUNICATIONS**

Written Communications: None

Public Participation: None

Approval of Agenda/Order of Agenda: The motion was made by Mrs. Nisan, seconded by Ms. Tosh, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

Consent Agenda: **CONSENT AGENDA**

The motion was made by Mr. Wolf, seconded by Ms. Tosh approving the consent agenda items. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

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Action Items:

ACTION ITEMS

a. The motion was made by Ms. Nisan, seconded by Mrs. Meraz approving the updated Certificated Administrator Salary Schedule. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

b. The motion was made by Ms. Tosh, seconded by Mrs. Meraz approving the 2021/2022 SELPA MOU. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

c. The motion was made by Mr. Wolf, seconded by Ms. Tosh approving the 2021/2022 Modesto Budget. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

d. The motion was made by Ms. Tosh, seconded by Mr. Wolf approving the 2021/2022 Salida Budget. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

e. The motion was made by Mrs. Nisan, seconded by Mrs. Meraz approving the Updated Classified Salary Schedule. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

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f. The motion was made by Mr. Wolf, seconded by Mrs. Nisan approving the Updated Stipend Schedule. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

g. The motion was made by Ms. Tosh, seconded by Mrs. Nisan approving the Local Control & Accountability Plan (LCAP)- Modesto. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

h. The motion was made by Ms. Tosh, seconded by Mrs. Meraz approving the Local Control & Accountability Plan (LCAP)- Salida. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

i. The motion was made by Mrs. Nisan, seconded by Mrs. Meraz approving the change in insurance provider from Chartersafe to Bolton & Company. A roll call vote was taken.

AYES: Meraz, Tosh, Nisan, Wolf

NOES: None

ABSENT: Payne, Jamison

ABSTENTIONS: None

Information and Discussion:

Ms. Silvestre Franklin presented the following:

- Modesto Survey Results – School Climate
- Salida Survey Results – School Climate
- Modesto Parent Engagement Self Reflection
- Salida Parent Engagement Self Reflection
- Modesto – Local Priority 1 Self Reflection
- Salida – Local Priority 1 Self Reflection

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Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting –

August 2, 2021 (if needed) or August 30, 2021

Adjournment:

The meeting was adjourned at 5:13 p.m.



GREAT VALLEY ACADEMY

SHORT-TERM INDEPENDENT STUDY POLICY

Policy No: 2021.059

Great Valley Academy, which operates Great Valley Academy Modesto and Great Valley Academy Salida (collectively, “GVA” or “Charter School”) may offer independent study to meet the short-term educational needs of pupils enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach the knowledge and skills of the core curriculum. The Charter School shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully. The following written policies have been adopted by the GVA Board of Trustees for implementation at Charter School:

1. Short-term independent study is available for students enrolled in GVA’s classroom-based program who will be absent for a period of a minimum of three (3) to a maximum of fourteen (14) school days. The purpose of short-term independent study is to accommodate travel plans, extended illness, or other extenuating circumstances that prohibit the student from accessing on-campus instruction. A student may not participate in short-term independent study pursuant to this policy for more than fourteen (14) cumulative school days in a school year. Further absences will be addressed in accordance with the Charter School’s attendance policy and may be considered unexcused and/or lead to truancy prevention measures, depending on the nature of the absence. Written requests for independent study must be submitted by parents to student’s teacher at least five (5) school days before the anticipated start date of the short-term independent study, and must be pre-approved by teacher. Independent Study request forms are available in the main office.
2. For pupils in all grade levels who participate in short-term independent study pursuant to this Policy, the maximum length of time that may elapse between the time an assignment is made and the date by which the pupil must complete the assigned work shall be **ten (10) school days**.
3. The Chief Executive Officer or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
 - a. When any pupil fails to complete **30% of assignments** during any period of ten **(10) school days**.
 - b. In the event Student’s educational progress falls below satisfactory levels as determined by the Charter School’s student evaluation process which considers ALL of the following indicators:

- i. The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
- ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
- iii. Learning required concepts, as determined by the supervising teacher.
- iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

4. The Charter School shall provide content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction.
5. A current written agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:
 - a. The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
 - b. The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.
 - c. The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.
 - d. A statement of the policies adopted pursuant to Education Code Section 51747, subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in independent study.
 - e. The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year. Pursuant to this policy, no student may participate in independent study beyond 14 school days in a school year.
 - f. A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.

- g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
 - h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.
 - i. Each written agreement shall be signed, before the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.
- 6. The Charter School shall comply with the Education Code sections 51745 through 51749.3 and the provisions of the Charter Schools Act of 1992 and the State Board of Education regulations adopted there under.
 - 7. The Chief Executive Officer or designee shall establish regulations to implement these policies in accordance with the law.



Great Valley Academy

INDEPENDENT STUDY POLICY

Policy No: 2021.060

Great Valley Academy, which operates Great Valley Academy Modesto and Great Valley Academy Salida (collectively, “GVA” or “Charter School”) may offer independent study to meet the educational needs of pupils enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach the knowledge and skills of the core curriculum. This Policy applies to pupils enrolled in GVA’s Home Study Program. The Charter School shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully. The following written policies have been adopted by the GVA Board of Trustees for implementation at the Charter School:

1. For pupils in all grade levels who participate in the Home Study Program, the maximum length of time that may elapse between the time an assignment is made and the date by which the pupil must complete the assigned work shall be **10 (ten) school days**.
2. The Chief Executive Officer or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
 - a. When any pupil fails to complete **30% of assignments** during any period of **20 (twenty) school days**.
 - b. In the event Student’s educational progress falls below satisfactory levels as determined by the Charter School’s student evaluation process which considers ALL of the following indicators:
 - i. The pupil’s achievement and engagement in the independent study program, as indicated by the pupil’s performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
 - ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
 - iii. Learning required concepts, as determined by the supervising teacher.
 - iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

3. The Charter School shall provide content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction.
4. The Charter School has adopted tiered reengagement strategies for all pupils who are not generating attendance for more than three (3) school days or 60% of the instructional days in a school week, or who are in violation of the written agreement pursuant to Education Code Section 51747(g). These procedures are as follow:
 - a. Verification of current contact information for each enrolled pupil;
 - b. Notification to parents or guardians of lack of participation within one school day of the absence or lack of participation;
 - c. Outreach from the Charter School to determine pupil needs including connection with health and social services as necessary;
 - d. When the evaluation described above under paragraph 2.b.iv. is triggered to consider whether remaining in independent study is in the best interest of the pupil, a pupil-parent-education conference shall be required to review a pupil's written agreement and reconsider the independent study program's impact on the pupil's achievement and well-being. This conference shall be a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement.
5. The following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction and live interaction:
 - a. For pupils in Kindergarten through grade 3, inclusive, the plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: "live" two-way communication between the teacher and student. May include classroom-style instruction, small group, or one-on-one instruction delivered virtually or in person.
 - b. For pupils in grades 4-8, inclusive, the plan to provide opportunities for daily live interaction between the pupil and a certificated or non-certificated employee of the Charter School and at least weekly synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: Weekly Synchronous Instruction: "live" two-way communication between the teacher and student. May include classroom-style instruction, small group, or one-on-one instruction delivered virtually or in person. Daily "Live" Interaction: A Great Valley Academy employee will interact with the student

daily for the purpose of maintaining school connectedness. May include progress monitoring, services, and instruction taking place virtually or in person.

The following plan shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days: Within five (5) school days of the receipt of Parent's written request for Student to participate in in-person instruction, GVA will provide Parent with information regarding options for in-person instruction including, but not limited to, within the Student's District of residence.

6. A current written agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:
 - a. The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
 - b. The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.
 - c. The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.
 - d. A statement of the policies adopted pursuant to Education Code Section 51747, subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in independent study.
 - e. The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.
 - f. A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.
 - g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
 - h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also

shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction, including, not limited to, within the student's district of residence.

- i. Each written agreement shall be signed, before the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.
7. The Charter School shall comply with the Education Code sections 51745 through 51749.3 and the provisions of the Charter Schools Act of 1992 and the State Board of Education regulations adopted there under.
 8. The Chief Executive Officer or designee shall establish regulations to implement these policies in accordance with the law.



Covid Safety Plan (CSP)

Updated July 27, 2021
GREAT VALLEY ACADEMIES
3200 Tully Road, Modesto CA 95350



Great Valley Academy Charter Schools

Number of schools: 2

Total Enrollment: 1,713

Great Valley Academy-Modesto
3200 Tully Road
Modesto, CA 95355

Great Valley Academy-Salida
5901 Sisk Road
Modesto, CA 95356

Superintendent (or equivalent) Name: Leah Silvestre Franklin
3200 Tully Road
Modesto, CA
95350

Phone Number: (209)576-2283
Email: l.silvestre@greatvalleyacademy.com

Cleaning and Disinfection

Great Valley Academies provides the following related to cleaning and ventilation/air flow:

- All classroom, office and shared spaces are cleaned nightly
- Includes desks, chairs, tables, hard surfaces, high touchpoints
- Disinfectant spray, towels and gloves are available in every classroom, and high use areas
- Bathrooms are disinfected nightly
- Playground equipment is disinfected nightly
- Water fountains are closed; water filling stations are used, with disposable cups available to students without water bottles
- HVAC filters are all MERV 11 and are changed bi-monthly
- HVAC units are equipped with Bipolar Ionization AirPurifiers
- Doors and windows will be left open for improved air flow, as practicable

Entrance, Egress and Movement Within the School

- Volunteers and visitors are suspended (with the exception of service providers)
- Student drop off and pick up is staff supervised; parents remain in vehicle, students escorted in/out of the vehicle and directed to classrooms/vehicle
- Parents arriving on campus for student drop off or pick up (outside of drop off/pickup process), must wear face a covering

Face Coverings and Other Essential Protective Gear

GVA follows the California Department of Public Health's (CDPH) face covering guidelines:

Age	Face Covering Requirement
under 2 years old	No
2 years old – 12 th grade	Yes

- Students are provided a face covering if needed
- All staff are required to wear a face covering unless they are instructing students in a way their mouth needs to be visible (speech, special education, English learner support, younger students), in which case, they may wear a face shield with drape (addressed on a case by case basis)
- Following CDPH guidance, students who are not exempt from wearing a face covering and choose not to wear one will be referred to an independent study program
- Students that are certified medically exempt are required to wear a shield with drape
- Face coverings can be removed for eating, drinking and outdoor activities
- Staff handling or serving food must wear gloves in addition to face covering

Healthy Hygiene Practices

- Signage is prominently displayed at school sites reminding individuals of proper hygiene protocols
- Hand sanitizer is available upon entry to school campuses
- Each classroom and common area has access to hand sanitizer
- Routines are established in support of frequent handwashing
- Handwashing or use of hand sanitizer will occur
 - upon entry to any instructional area
 - before and after eating
 - before and after recess
 - before and after PE activity
- Additional handwashing stations have been added at multiple strategic locations on each campus
- Restrooms are stocked with soap and paper towels, supplies will be checked and refilled nightly and during the school day

Health Screenings for Students and Staff

- GVA Staff and students are directed to complete self screening prior to arriving on campus
- GVA staff and students are directed to stay home and see a health care provider if they experience any flu like symptoms
- Get tested for Covid when symptoms are compatible
- Students exhibiting symptoms are immediately sent to the office where they will be screened and will remain in a sick room until they can be picked up
- Sick room is disinfected after each use
- Staff exhibiting symptoms are sent home
- If student or staff is confirmed with a positive test result, GVA will work with Stanislaus County Public Health department and will communicate as appropriate with school community

Recommendations for staying home when sick

- Getting tested for COVID-19 when symptoms are consistent with COVID-19 will help with rapid contact tracing and prevent possible spread at school
- Students with symptoms of COVID-19 infection cannot return for in-person instruction until they have met CDPH criteria to return to school for those with symptoms:
 - At least 24 hours have passed since resolution of fever without the use of fever-reducing medications; **and**
 - Other symptoms have improved; **and**
 - They have a negative test for SARS-CoV-2 **OR** a healthcare provider has provided documentation that the symptoms are typical of their underlying chronic condition (e.g., allergies or asthma) **OR** a healthcare provider has confirmed an alternative named diagnosis (e.g., Streptococcal pharyngitis, Coxsackie virus), **OR** at least 10 days have passed since symptom onset.

Quarantine guidelines

- Fully Vaccinated Close Contact
 - Refrain from quarantine and testing following a known exposure if asymptomatic
 - Following a known exposure at work, fully vaccinated workers do not need to quarantine if asymptomatic
 - If symptomatic, quarantine for 10 days is required and testing is recommended
- When both parties were wearing a mask in the indoor classroom setting, unvaccinated students who are close contacts (more than 15 minutes over a 24-hour period within 0-6 feet indoors) may undergo a modified 10-day quarantine as follows. They may continue to attend school for in-person instruction if they:
 - Are asymptomatic; **and**
 - Continue to appropriately mask, as required; **and**
 - Undergo at least twice weekly testing during the 10-day quarantine; **and**
 - Continue to quarantine for all extracurricular activities at school, including sports, and activities within the community setting
- Unvaccinated close contacts who were not wearing masks or for whom the infected individual was not wearing a mask during the indoor exposure
 - For these contacts, those who remain asymptomatic, meaning they have NOT had any symptoms, may discontinue self-quarantine under the following conditions:

- Quarantine can end after Day 10 from the date of last exposure without testing; **OR**
- Quarantine can end after Day 7 if testing occurs after Day 5 from the date of last exposure and tests negative
 - o To discontinue quarantine before 14 days following last known exposure, asymptomatic close contacts must:
- Continue daily self-monitoring for symptoms through Day 14 from last known exposure; **and**
- Follow all recommended non-pharmaceutical interventions (e.g., wearing a mask when around others, hand washing, avoiding crowds) through Day 14 from last known exposure
- If any symptoms develop during this 14-day period, the exposed person must:
 - o immediately isolate
 - o get tested
 - o contact their healthcare provider
- Students that are quarantined can request a short term independent study from their teacher

Testing of Students and Staff

- GVA students exhibiting symptoms are immediately sent to the office where they are screened and remain in a sick room until they can be picked up, GVA then refers them to COVID 19 testing per CDPH guidelines. Receiving a negative test result is the fastest path to return to class.
- GVA staff have access to self-testing supplies and can access when recommended or needed

Exclusion of COVID-19 Cases-Employees

Where we have a COVID-19 case in our workplace, we will limit transmission by:

- Ensuring that COVID-19 cases are excluded from the workplace until our return-to-work requirements are met
- Excluding employees with COVID-19 exposure from the workplace for up to 14 days after the last known exposure to a COVID-19 case
- Continuing and maintaining an employee's earnings, seniority, and all other employee rights and benefits whenever we've demonstrated that the COVID-19 exposure is work related; this will be accomplished by offering time off/leave options
- Providing employees with information on available benefits at the time of exclusion

Return to Work Criteria

COVID-19 cases with COVID-19 symptoms will not return to work until all the following have occurred:

- Up to 24 hours have passed since a fever of 100.4 or higher have resolved without the use of fever-reducing medications; **and**
- Covid 19 symptoms have improved; **and**
- At least 10 days have passed since COVID-19 symptoms first appeared
- COVID-19 cases who tested positive and never developed COVID-19 symptoms will not return to work until a minimum of 10 days have passed since the date of specimen collection of their first positive COVID-19 test
- A negative COVID-19 test will not be required for an employee to return to work
- If an order to isolate or quarantine an employee is issued by a local or state health official, the employee will not return to work until the period of isolation or quarantine is completed or the order is lifted; if no period was specified, the period will be up to 14 days from the time the order to quarantine was effective
- Exceptions to the above requirements:
 - Employees that are fully vaccinated
 - Employees who have returned to work after Covid -19 positive within 90 days of most recent exposure
- Vaccinated and unvaccinated employees may have different Covid protocol guidelines as outlined by CalOsha

Identification and Tracing of Contacts

- GVA works in consultation with the Stanislaus County Public Health Department on topics including but not limited to tracing contacts of confirmed positive cases and provision of communication with those contacts as appropriate
- GVA participates in StanTrack, the web-based system created by the Stanislaus County Public Health Department which tracks student absenteeism and individual positive cases
- GVA conducts contact tracing and communication with those who were in close personal contact (CPC) with someone who has tested positive
- CDPH defines close personal contact as a person who is 0-6 feet from someone testing positive for more than 15 minutes over a 24 hour period
- GVA confidentially tracks both staff and student positive cases, data to include (not limited to) positivity determination date, return to campus date, and other relevant details
- GVA confidentially tracks both staff and student close personal contacts (CPC),

related follow up and status

- Designated staff contact information provided to the Stanislaus County Public Health Department
 - Chief Executive Officer, Leah Silvestre Franklin
 - Chief Operating Officer, Marisa Meeks
- GVA follows the CDPH guidelines for measures to be taken when student or staff member have symptoms, is a CPC of someone who has the virus or tests positive with the virus

Staff Training and Family Education

- All staff are trained on cleaning protocols, face covering requirements, Covid 19 response, staff testing availability, hygiene practices, student illness protocol, student screening and visitor/volunteer suspension
- Families continue to receive ParentSquare communication regarding safety plans and ongoing updates
- In coordination with the Stanislaus County Public Health Officer, affected stakeholders will be notified via Email and ParentSquare regarding potential virus exposure

Reporting, Recordkeeping, and Access

It is our policy to:

- Report information about COVID-19 cases at our workplace to the local health department, and provide any related information requested by the local health department
- Report immediately to Cal/OSHA any COVID-19-related serious illnesses or death, as defined under CCR Title 8 section 330(h), of an employee occurring in our place of employment or in connection with any employment
- Maintain records of the steps taken to implement our COVID-19 Prevention Protocol
- Make our COVID-19 Prevention Protocol available to employees, and to representatives of Cal/OSHA upon request
- Use GVA database to keep a record of and track all COVID-19 cases; information may be made available as required by law, with personal identifying information removed

Communication Plans

- GVA communicates with Stanislaus County Public Health any positive case information received
- In coordination with the Stanislaus County Public Health Officer, GVA uses our website, Email, and ParentSquare posts to communicate with affected stakeholders of potential virus exposure. This communication will be consistent with legal counsel guidance regarding the Family Educational Rights and Privacy Act.
- GVA Chief Executive Officer, Chief Operating Officer or Human Resources representative communicate directly with affected staff members

GREAT VALLEY ACADEMY
Regular Meeting of the Board of Trustees
August 30, 2021 4:30 pm ~via Zoom

This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.

The Board of Directors ("Board") and employees of Great Valley academy shall meet via Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at

<https://us02web.zoom.us/j/87939820878?pwd=MmFDVml2QVFhSHJ3MG5kbDUwU3FLQT09>

You may also call in using the Zoom phone number +1 669 900 6833 US Meeting ID 8793982078. Members of the public who wish to comment during the Board meeting may email in comments to publiccomment@greatvalleyacademy.com and they will be read during the public participation segment of the meeting. Comments must be received by 12:00 p.m. on the day of the meeting. Members of the public calling in will be given the opportunity to address the Board during the public participation segment of the meeting. Individual comments will be limited to three (3) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Access to Board Materials: You may request a copy of the written materials submitted to the Board by sending a request to publiccomment@greatvalleyacademy.com.

Disability Access: A copy for disability-related modifications or accommodations to participate in this public meeting should be made at least 24 hours prior to the meeting by emailing publiccomment@greatvalleyacademy.com. Efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

AGENDA

a. CALL TO ORDER

b. COMMUNICATIONS

- a. PUBLIC PARTICIPATION**
- b. MODESTO PRINCIPAL REPORT**
- c. SALIDA PRINCIPAL REPORT**
- d. HOMESCHOOL PRINCIPAL REPORT**
- e. CHIEF OPERATING OFFICER'S REPORT**
- f. CHIEF EXECUTIVE OFFICER'S REPORT**
- g. FOUNDER'S REPORT**

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

c. APPROVAL OF AGENDA AND ORDER OF AGENDA

d. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of August 2, 2021

e. ACTION ITEMS

- a. Approval of Modesto Unaudited Actuals
- b. Approval of Salida Unaudited Actuals
- c. Approval of Updated Home Study Based Independent Study Policy
- d. Approval of 2021-2022 Stipends
- e. Approval of Policy #2020.057[REVISED] Education of Foster, Mobile and Homeless Youth Policy
- f. Approval of Family and Parent Engagement Policy

f. INFORMATION AND DISCUSSION

- a. Updated 2021-2022 Board Meeting Calendar

g. FUTURE AGENDA ITEMS

a. FUTURE REGULAR BOARD MEETINGS – September 27, 2021

~4:30 pm Via Zoom

Beginning with the Board Meeting of October 25, 2021 we will be meeting in person at 5:30 p.m. at 1209 Woodrow Ave. Suite A4 Modesto, CA 95350

h. FINAL ADJOURNMENT

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Aug. 10- Aug. 25, 2021

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	77.42	89.29	77.42	89.29
1	74	66.75	87.51	66.75	87.51
2	83	90.89	90.89	90.89	90.89
3	93	91.40	91.40	91.40	91.40
4	90	80.67	89.12	80.67	89.12
5	76	69.58	91.55	69.58	91.55
6	91	90.71	90.71	90.71	90.71
7	102	92.61	92.61	92.61	92.61
8	77	91.77	91.77	91.77	91.77
Total	771	703.67	90.60	703.67	90.60

2. Key Accomplishments:

Back to School Meet and Greet (Drive Thru)
Comprehensive Teacher Training Week
Positive Start to School Year
1st Spirit Day- Grade Color Day
In Person Outdoor Assemblies
Aligned Glasser Family Meeting Topics
Elective Choices for 7th and 8th
SCOE Math/ELA Training `

3. Upcoming Key Events/Activities:

NWEA Testing
K-2 Benchmarks
September Spirit Day
Teacher In Service Day
Aligned Math assessments to drive SST Process
Continue Partnership with SCOE Math/Science

Great Valley Academy Salida

Charter School Monthly Summary Report

August 30, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

*Attendance dates are from 08/10/2021-08/25/2021

Grade	Enrollment	ADA	ADA %
K	81	72.69	91.35
1	98	90.31	91.10
2	89	81.46	89.92
3	99	93.23	95.05
4	89	80.85	92.51
5	96	86.31	89.26
6	92	83.08	90.56
7	80	73.23	92.96
8	82	75.46	92.11
Total	806	736.61	91.63

2. Key Accomplishments:

- a. Successfully facilitated first formal summer school program in GVA history
- b. Successful, highly differentiated week of staff training prior to first day of school
- c. Great start to the school year: Students and staff happy to be back
- d. Partnering with SCOE to work on both science and math instruction
- e. Implementing Discovery Science K-8
- f. Aug. 25-26: Student pictures

3. Upcoming Key Events/Activities:

- a. Aug. 30 – Sept. 17: NWEA assessment

Great Valley Academy Homeschool

Charter School Monthly Summary Report

August 30, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

No data to present. AWR's Pending.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K					
1					
2					
3					
4					
5					
6					
7					
8					
Total					

2. Key Accomplishments:

- a. August 3rd – Homeschool Parent Orientation
- b. August 4th – New Assignment Work Record, Master Agreement
- c. August 6th – Two new Advisory Teachers joined our team
- d. August 10th – First day of school: Back to School Picnic at Davis Park
- e. August 24rd – Homeschool Parent Orientation

3. Upcoming Key Events/Activities:

- a. September 2rd—Weekly Enrichment classes begin in person
- b. September 3rd – 1st Assignment Work Record (AWR) with new format due
- c. September 8th – 1st of several “SPED 101 Workshop Training” sessions by Stanislaus SELPA for Advisory Teachers
- d. September 10th – 1st Field Trip of the Year: Micke Grove Regional Park
- e. September 17th – Teacher In-Service Day

Chief Operating Officer's Report
August 30, 2021
Board Meeting



Process and Policy Updates

- ❖ COVID Contact Tracing School Protocols – Ongoing
- ❖ COVID Onsite Testing Capabilities – In Progress
- ❖ Supervisor & Managers Training – September 2021

Multi-Campus Responsibilities

- ❖ Budget Revision – In Progress
- ❖ Campus Hazard Inspections – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Interviewing & Hiring for new Multi-Campus Positions – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Launch of SchoolWise Parent Portal – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Certificated Salary Schedule Analysis – Begin Fall 2021
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)
- ❖ Development of Manager's and Supervisor's Intranet – In Progress

Website Analytics

- ❖ July 2021
 - ❑ 3,371 Users Visited (91.6% New/8.4% Returning)
 - ❑ 11,921 Page Views
 - ❑ Users Averaged 1:58 Minutes on the Site
 - ❑ 63.2% Mobile – 35.7% Desktop – 1.1% Tablet
 - ❑ Type: Organic 57.7% – Direct 37.7% – Referral 3.5% – Social 1.1%

Training

- ❖ CDPH Onsite COVID Testing Training – In Progress
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ COVID Return to Work Safely Protocols – Ongoing
- ❖ SCOE CBO Meetings – Ongoing



Chief Executive Officer's Report
August 30, 2021
Board Meeting

State Accountability

- No data available (no testing 2020/21)

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Ongoing participation in 360 Accelerator
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position

Homeschool

- Onboarding new principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding



Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021



Founders Report
Great Valley Academy School Board
August 30, 2021

This is an exciting school year for GVS. We have always wanted to operate the GVS program like other GVA intervention programs. This year it is happening. We will now see students in the pull out program 4 times per week for a 6 week rotation. We have hired two additional staff people and split the GVS team to cover both campuses. The new hires are fitting in well with the existing staff and are quick learners with lots of questions.

In addition we are doing “push-in” programs in 1st and 2nd and kindergarten extension. This is not only to help students become better learners and introduce the new lower elementary teachers to GVS.

Vision examinations for staff and on campus students are done on a weekly basis.

Staff trainings have continued with the GVS staff. Basic trainings with the new hires started last week and will continue for the next several months.

Sincerely,

Eldon Rosenow, Founder

**GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
August 2, 2021**

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Vince Jamison, Susan Nisan

Members Absent: Twila Tosh

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Dr. Rosenow, Tarah Heilman, Mike Ruehle, Russ Howell, Melissa Woods, Kelli Rupe

Audience Present: None

Call to Order: Mr. Payne called the meeting to order at 4:31 p.m.

Student Presentation:

Communications: **COMMUNICATIONS**

Written

Communications: None

Public Participation: None

***Approval of Agenda/
Order of Agenda:***

The motion was made by Mrs. Meraz, seconded by Mr. Jamison, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mr. Payne, seconded by Mrs. Meraz approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

August 2, 2021

Page | 2

Mr. Payne opened the Public Hearing at 4:40 p.m. for comments. Hearing none, the Board moved on to the Action Items.

Action Items:

ACTION ITEMS

a. The motion was made by Mr. Payne, seconded by Mrs. Meraz approving Policy #2021.059 Short Term Independent Study Policy. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

b. The motion was made by Mr. Payne, seconded by Mrs. Nisan approving Policy #2021.060 Home Study Independent Study Policy. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

c. The motion was made by Mr. Jamison, seconded by Mrs. Nisan approving the Updated COVID Safety Plan. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Future Agenda Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Monday August 30, 2020

~4:30 p.m. via Zoom

Adjournment:

The meeting was adjourned at 4:52 p.m.

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy

CDS #: 50105040117457

Charter Approving Entity: Stanislaus County Office of Education

County: Stanislaus

Charter #: 0985

This charter school uses the following basis of accounting:

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

☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)

☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	3,245,985.00		3,245,985.00
Education Protection Account State Aid - Current Year	8012	2,887,386.00		2,887,386.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	1,693,330.00		1,693,330.00
Other LCFF Transfers	8091, 8097	0.00	141,021.00	141,021.00
Total, LCFF Sources		7,826,701.00	141,021.00	7,967,722.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		127,481.00	127,481.00
Special Education - Federal	8181, 8182		139,866.00	139,866.00
Child Nutrition - Federal	8220		377,917.68	377,917.68
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	430,685.47	430,685.47
Total, Federal Revenues		0.00	1,075,950.15	1,075,950.15
3. Other State Revenues				
Special Education - State	StateRevSE		6,999.58	6,999.58
All Other State Revenues	StateRevAO	174,004.10	617,255.05	791,259.15
Total, Other State Revenues		174,004.10	624,254.63	798,258.73
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	117,908.64	453,108.00	571,016.64
Total, Local Revenues		117,908.64	453,108.00	571,016.64
5. TOTAL REVENUES		8,118,613.74	2,294,333.78	10,412,947.52
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	2,908,431.21	322,535.57	3,230,966.78
Certificated Pupil Support Salaries	1200	0.00	0.00	0.00
Certificated Supervisors' and Administrators' Salaries	1300	332,797.93	71,581.94	404,379.87
Other Certificated Salaries	1900	0.00	0.00	0.00
Total, Certificated Salaries		3,241,229.14	394,117.51	3,635,346.65
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	520,775.53	227,687.84	748,463.37
Noncertificated Support Salaries	2200	186,087.06	32,671.77	218,758.83
Noncertificated Supervisors' and Administrators' Salaries	2300	228,732.92	12,733.34	241,466.26
Clerical, Technical and Office Salaries	2400	414,834.83	19,195.88	434,030.71
Other Noncertificated Salaries	2900	190,381.04	48,670.48	239,051.52
Total, Noncertificated Salaries		1,540,811.38	340,959.31	1,881,770.69

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy

CDS #: 50105040117457

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	498,535.35	47,780.50	546,315.85
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	158,968.08	25,993.30	184,961.38
Health and Welfare Benefits	3401-3402	516,042.90	71,190.62	587,233.52
Unemployment Insurance	3501-3502	20,466.35	2,464.13	22,930.48
Workers' Compensation Insurance	3601-3602	48,370.38	0.00	48,370.38
OPEB, Allocated	3701-3702	0.00	5,785.50	5,785.50
OPEB, Active Employees	3751-3752	42,539.71	0.00	42,539.71
Other Employee Benefits	3901-3902	4,803.32	136.24	4,939.56
Total, Employee Benefits		1,289,726.09	153,350.29	1,443,076.38
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	34,004.85	5,661.96	39,666.81
Books and Other Reference Materials	4200	3,552.74	0.00	3,552.74
Materials and Supplies	4300	192,141.01	221,208.41	413,349.42
Noncapitalized Equipment	4400	24,553.10	425,882.13	450,435.23
Food	4700	0.00	311,141.85	311,141.85
Total, Books and Supplies		254,251.70	963,894.35	1,218,146.05
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	114,868.83	237,003.77	351,872.60
Travel and Conferences	5200	9,307.59	15,402.78	24,710.37
Dues and Memberships	5300	15,745.51	0.00	15,745.51
Insurance	5400	133,112.65	0.00	133,112.65
Operations and Housekeeping Services	5500	110,611.92	0.00	110,611.92
Rentals, Leases, Repairs, and Noncap. Improvements	5600	120,676.29	357.00	121,033.29
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	136,747.68	245,091.42	381,839.10
Communications	5900	34,498.97	4,469.96	38,968.93
Total, Services and Other Operating Expenditures		675,569.44	502,324.93	1,177,894.37
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Depreciation Expense (accrual basis only)	6900	273,768.62	0.00	273,768.62
Total, Capital Outlay		273,768.62	0.00	273,768.62
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	45,395.31	45,395.31
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	(59,616.25)	59,616.25	0.00
Debt Service:				
Interest	7438	73,970.38	0.00	73,970.38
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		73,970.38	0.00	73,970.38
Total, Other Outgo		14,354.13	105,011.56	119,365.69
8. TOTAL EXPENDITURES		7,289,710.50	2,459,657.95	9,749,368.45

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy

CDS #: 50105040117457

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		828,903.24	(165,324.17)	663,579.07
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00		0.00
2. Less: Other Uses	7630-7699	0.00		0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(332,485.86)	332,485.86	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(332,485.86)	332,485.86	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		496,417.38	167,161.69	663,579.07
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	7,967,422.91	112,051.71	8,079,474.62
b. Adjustments/Restatements	9793, 9795	(93,389.78)	0.00	(93,389.78)
c. Adjusted Beginning Fund Balance /Net Position		7,874,033.13	112,051.71	7,986,084.84
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		8,370,450.51	279,213.40	8,649,663.91
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	2,922,880.64	0.00	2,922,880.64
b. Restricted Net Position	9797		519,182.40	519,182.40
c. Unrestricted Net Position	9790A	5,447,569.87	(239,969.00)	5,207,600.87

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy

CDS #: 50105040117457

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110	0.00	0.00	0.00
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00
In Banks	9120	4,407,029.09	(77,853.35)	4,329,175.74
In Revolving Fund	9130	0.00	0.00	0.00
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00
Collections Awaiting Deposit	9140	0.00	0.00	0.00
2. Investments	9150	1,032,906.94	0.00	1,032,906.94
3. Accounts Receivable	9200	386,563.33	569,355.43	955,918.76
4. Due from Grantor Governments	9290	0.00	0.00	0.00
5. Stores	9320	0.00	0.00	0.00
6. Prepaid Expenditures (Expenses)	9330	88,450.51	0.00	88,450.51
7. Other Current Assets	9340	71,209.02	0.00	71,209.02
8. Capital Assets (accrual basis only)	9400-9489	4,321,222.43	0.00	4,321,222.43
9. TOTAL ASSETS		10,307,381.32	491,502.08	10,798,883.40
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	535,555.45	162,956.50	698,511.95
2. Due to Grantor Governments	9590	0.00	0.00	0.00
3. Current Loans	9640	0.00	0.00	0.00
4. Unearned Revenue	9650	3,033.57	49,332.18	52,365.75
5. Long-Term Liabilities (accrual basis only)	9660-9669	1,398,341.79	0.00	1,398,341.79
6. TOTAL LIABILITIES		1,936,930.81	212,288.68	2,149,219.49
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2) (must agree with Line F2)		8,370,450.51	279,213.40	8,649,663.91

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**
July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy
CDS #: 50105040117457

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. NONE	\$ 0.00	0.00	0.00
b.	0.00	0.00	0.00
c.	0.00	0.00	0.00
d.	0.00	0.00	0.00
e.	0.00	0.00	0.00
f.	0.00	0.00	0.00
g.	0.00	0.00	0.00
h.	0.00	0.00	0.00
i.	0.00	0.00	0.00
j.	0.00	0.00	0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999 0.00
b. Noncertificated Salaries	2000-2999 0.00
c. Employee Benefits	3000-3999 0.00
d. Books and Supplies	4000-4999 0.00
e. Services and Other Operating Expenditures	5000-5999 0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2020 to June 30, 2021**

Charter School Name: Great Valley Academy
CDS #: 50105040117457

3. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2019-20 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2022-23.

a. Total Expenditures (B8)	9,749,368.45
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	1,075,950.15
c. Subtotal of State & Local Expenditures [a minus b]	8,673,418.30
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total]	347,739.00
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e]	\$ 8,325,679.30

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida

CDS #: 50712660124768

Charter Approving Entity: Salida Union School District

County: Stanislaus

Charter #: 1819

This charter school uses the following basis of accounting:

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

☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)

☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	6,062,057.00		6,062,057.00
Education Protection Account State Aid - Current Year	8012	170,184.00		170,184.00
State Aid - Prior Years	8019	1,175,257.00		1,175,257.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	0.00		0.00
Other LCFF Transfers	8091, 8097	0.00	135,372.00	135,372.00
Total, LCFF Sources		7,407,498.00	135,372.00	7,542,870.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		79,236.17	79,236.17
Special Education - Federal	8181, 8182		101,179.00	101,179.00
Child Nutrition - Federal	8220		277,736.78	277,736.78
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	330,600.28	330,600.28
Total, Federal Revenues		0.00	788,752.23	788,752.23
3. Other State Revenues				
Special Education - State	StateRevSE		26,887.19	26,887.19
All Other State Revenues	StateRevAO	170,331.44	622,353.49	792,684.93
Total, Other State Revenues		170,331.44	649,240.68	819,572.12
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	47,300.99	420,064.00	467,364.99
Total, Local Revenues		47,300.99	420,064.00	467,364.99
5. TOTAL REVENUES		7,625,130.43	1,993,428.91	9,618,559.34
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	2,751,845.98	261,500.51	3,013,346.49
Certificated Pupil Support Salaries	1200	0.00	0.00	0.00
Certificated Supervisors' and Administrators' Salaries	1300	207,502.34	64,839.18	272,341.52
Other Certificated Salaries	1900	0.00		0.00
Total, Certificated Salaries		2,959,348.32	326,339.69	3,285,688.01
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	482,961.42	61,280.63	544,242.05
Noncertificated Support Salaries	2200	218,651.85	46,905.58	265,557.43
Noncertificated Supervisors' and Administrators' Salaries	2300	159,553.94	12,733.34	172,287.28
Clerical, Technical and Office Salaries	2400	361,589.59	2,921.63	364,511.22
Other Noncertificated Salaries	2900	168,599.18	54,345.51	222,944.69
Total, Noncertificated Salaries		1,391,355.98	178,186.69	1,569,542.67

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida

CDS #: 50712660124768

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	453,788.88	38,534.65	492,323.53
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	143,069.62	17,053.22	160,122.84
Health and Welfare Benefits	3401-3402	519,358.58	29,621.06	548,979.64
Unemployment Insurance	3501-3502	17,719.38	1,662.57	19,381.95
Workers' Compensation Insurance	3601-3602	57,443.75	0.00	57,443.75
OPEB, Allocated	3701-3702	0.00	3,599.31	3,599.31
OPEB, Active Employees	3751-3752	36,188.00	0.00	36,188.00
Other Employee Benefits	3901-3902	3,001.14	114.04	3,115.18
Total, Employee Benefits		1,230,569.35	90,584.85	1,321,154.20
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	236.76	3,894.70	4,131.46
Books and Other Reference Materials	4200	0.00	0.00	0.00
Materials and Supplies	4300	121,859.55	205,482.13	327,341.68
Noncapitalized Equipment	4400	11,612.04	383,221.00	394,833.04
Food	4700	0.00	237,000.32	237,000.32
Total, Books and Supplies		133,708.35	829,598.15	963,306.50
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	98,074.98	228,393.65	326,468.63
Travel and Conferences	5200	24,300.45	11,372.50	35,672.95
Dues and Memberships	5300	14,774.39	0.00	14,774.39
Insurance	5400	133,112.64	0.00	133,112.64
Operations and Housekeeping Services	5500	115,106.53	0.00	115,106.53
Rentals, Leases, Repairs, and Noncap. Improvements	5600	70,827.22	471.00	71,298.22
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	136,377.50	343,730.98	480,108.48
Communications	5900	20,086.42	3,540.00	23,626.42
Total, Services and Other Operating Expenditures		612,660.13	587,508.13	1,200,168.26
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Depreciation Expense (accrual basis only)	6900	376,198.78	0.00	376,198.78
Total, Capital Outlay		376,198.78	0.00	376,198.78
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	26,784.03	26,784.03
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	(52,832.26)	52,832.26	0.00
Debt Service:				
Interest	7438	238,118.29	0.00	238,118.29
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		238,118.29	0.00	238,118.29
Total, Other Outgo		185,286.03	79,616.29	264,902.32
8. TOTAL EXPENDITURES		6,889,126.94	2,091,833.80	8,980,960.74

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida

CDS #: 50712660124768

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		736,003.49	(98,404.89)	637,598.60
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00
2. Less: Other Uses	7630-7699	0.00	0.00	0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(248,300.97)	248,300.97	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(248,300.97)	248,300.97	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		487,702.52	149,896.08	637,598.60
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	6,509,938.13	94,746.36	6,604,684.49
b. Adjustments/Restatements	9793, 9795	0.00	0.00	0.00
c. Adjusted Beginning Fund Balance /Net Position		6,509,938.13	94,746.36	6,604,684.49
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		6,997,640.65	244,642.44	7,242,283.09
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	3,165,561.20	0.00	3,165,561.20
b. Restricted Net Position	9797		472,315.44	472,315.44
c. Unrestricted Net Position	9790A	3,832,079.45	(227,673.00)	3,604,406.45

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida

CDS #: 50712660124768

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110	0.00	0.00	0.00
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00
In Banks	9120	1,972,758.26	(46,152.62)	1,926,605.64
In Revolving Fund	9130	0.00	0.00	0.00
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00
Collections Awaiting Deposit	9140	0.00	0.00	0.00
2. Investments	9150	0.00	0.00	0.00
3. Accounts Receivable	9200	2,146,500.68	462,220.67	2,608,721.35
4. Due from Grantor Governments	9290	0.00	0.00	0.00
5. Stores	9320	0.00	0.00	0.00
6. Prepaid Expenditures (Expenses)	9330	6,170.45	0.00	6,170.45
7. Other Current Assets	9340	900.00	0.00	900.00
8. Capital Assets (accrual basis only)	9400-9489	7,572,788.66	0.00	7,572,788.66
9. TOTAL ASSETS		11,699,118.05	416,068.05	12,115,186.10
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	290,115.97	163,170.53	453,286.50
2. Due to Grantor Governments	9590	0.00	0.00	0.00
3. Current Loans	9640	0.00	0.00	0.00
4. Unearned Revenue	9650	4,133.97	8,255.08	12,389.05
5. Long-Term Liabilities (accrual basis only)	9660-9669	4,407,227.46	0.00	4,407,227.46
6. TOTAL LIABILITIES		4,701,477.40	171,425.61	4,872,903.01
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2) (must agree with Line F2)		6,997,640.65	244,642.44	7,242,283.09

**CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM**
July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida
CDS #: 50712660124768

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. NONE	\$ 0.00	0.00	0.00
b.	0.00	0.00	0.00
c.	0.00	0.00	0.00
d.	0.00	0.00	0.00
e.	0.00	0.00	0.00
f.	0.00	0.00	0.00
g.	0.00	0.00	0.00
h.	0.00	0.00	0.00
i.	0.00	0.00	0.00
j.	0.00	0.00	0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999 0.00
b. Noncertificated Salaries	2000-2999 0.00
c. Employee Benefits	3000-3999 0.00
d. Books and Supplies	4000-4999 0.00
e. Services and Other Operating Expenditures	5000-5999 0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2020 to June 30, 2021

Charter School Name: Great Valley Academy Salida
CDS #: 50712660124768

3. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2019-20 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2022-23.

a. Total Expenditures (B8)	8,980,960.74
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	788,752.23
c. Subtotal of State & Local Expenditures [a minus b]	8,192,208.51
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total]	614,317.07
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e]	\$ 7,577,891.44



Great Valley Academy

INDEPENDENT STUDY POLICY

Policy No: 2021.060

revised

Great Valley Academy, which operates Great Valley Academy Modesto and Great Valley Academy Salida (collectively, “GVA” or “Charter School”) may offer independent study to meet the educational needs of pupils enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach the knowledge and skills of the core curriculum. This Policy applies to pupils enrolled in GVA’s Home Study Program. The Charter School shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully. The following written policies have been adopted by the GVA Board of Trustees for implementation at the Charter School:

1. For pupils in all grade levels who participate in the Home Study Program, the maximum length of time that may elapse between the time an assignment is made and the date by which the pupil must complete the assigned work shall be **20 (twenty) school days**.
2. The Chief Executive Officer or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
 - a. When any pupil fails to complete **30% of assignments** during any period of **20 (twenty) school days**.
 - b. In the event Student’s educational progress falls below satisfactory levels as determined by the Charter School’s student evaluation process which considers ALL of the following indicators:
 - i. The pupil’s achievement and engagement in the independent study program, as indicated by the pupil’s performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
 - ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
 - iii. Learning required concepts, as determined by the supervising teacher.
 - iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

3. The Charter School shall provide content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction.
4. The Charter School has adopted tiered reengagement strategies for all pupils who are not generating attendance for more than three (3) school days or 60% of the instructional days in a school week, or who are in violation of the written agreement pursuant to Education Code Section 51747(g). These procedures are as follow:
 - a. Verification of current contact information for each enrolled pupil;
 - b. Notification to parents or guardians of lack of participation within one school day of the absence or lack of participation;
 - c. Outreach from the Charter School to determine pupil needs including connection with health and social services as necessary;
 - d. When the evaluation described above under paragraph 2.b.iv. is triggered to consider whether remaining in independent study is in the best interest of the pupil, a pupil-parent-education conference shall be required to review a pupil's written agreement and reconsider the independent study program's impact on the pupil's achievement and well-being. This conference shall be a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement.
5. The following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction and live interaction:
 - a. For pupils in Kindergarten through grade 3, inclusive, the plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: "live" two-way communication between the teacher and student. May include classroom-style instruction, small group, or one-on-one instruction delivered virtually or in person.
 - b. For pupils in grades 4-8, inclusive, the plan to provide opportunities for daily live interaction between the pupil and a certificated or non-certificated employee of the Charter School and at least weekly synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: Weekly Synchronous Instruction: "live" two-way communication between the teacher and student. May include classroom-style instruction, small group, or one-on-one instruction delivered virtually or in person. Daily "Live" Interaction: A Great Valley Academy employee will interact with the student

daily for the purpose of maintaining school connectedness. May include progress monitoring, services, and instruction taking place virtually or in person.

The following plan shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days: Within five (5) school days of the receipt of Parent's written request for Student to participate in in-person instruction, GVA will provide Parent with information regarding options for in-person instruction including, but not limited to, within the Student's District of residence.

6. A current written agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:
 - a. The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
 - b. The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.
 - c. The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.
 - d. A statement of the policies adopted pursuant to Education Code Section 51747, subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in independent study.
 - e. The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.
 - f. A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.
 - g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
 - h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also

shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction, including, not limited to, within the student's district of residence.

- i. Each written agreement shall be signed, before the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.
7. The Charter School shall comply with the Education Code sections 51745 through 51749.3 and the provisions of the Charter Schools Act of 1992 and the State Board of Education regulations adopted there under.
 8. The Chief Executive Officer or designee shall establish regulations to implement these policies in accordance with the law.

Great Valley Academy

2021/22 Approved Stipends

<u>Stipend Type</u>	<u>Amount</u>	<u>Period</u>	<u>Board Approval Date</u>
Additional Services:			
Resource Teacher	\$2,500	Annual	6/24/19
K Teacher (2 Classes)	\$1,000	Annual	2016
Leadership Team	\$500	Annual	2015
Special Ed Data Coordinator	\$250	Trimester	12/9/19
Induction Support (in addition to FT teaching)	\$250	Per Inductee/Annual	12/9/19
*Teacher on Assignment	\$1,000 - \$10,000	Annual	6/14/21
Academic, Athletics & Art:			
Athletic Director	\$800	Annual	2015
Athletic Coach	\$500	Per Sport/Per Grade	2015
Science Team	\$500	Annual	6/6/16
Math Team	\$500	Annual	6/6/16
Technology Lead	\$500	Annual	2015
Spelling Bee Lead	\$500	Annual	4/29/19
Talent Show Lead	\$500	Annual	4/29/19
Above & Beyond Music Lead	\$500	Trimester	6/6/16
*Academic Decathlon Lead	\$500	Trimester	For Approval 8/30/21
*Afterschool Club Lead	\$300	Upon Conclusion of 6 Week Session	For Approval 8/30/21
Teacher Leader:			
Character Education	\$500	Trimester	3/28/16
Culture Cultivator	\$500	Trimester	3/28/16
Mastery Learning	\$500	Trimester	3/28/16
Professional Development	\$500	Trimester	3/28/16
GVS-Smart Reading System	\$500	Trimester	12/5/16
New Teacher Support	\$500	Trimester	3/28/16
English Language Learner	\$500	Trimester	4/29/19
Site Administrator Intern	\$1,500	Trimester	3/28/16
Multi-Campus Teacher Leader:			
Conscious Discipline (CD)	\$4,000	Annual	4/30/18
English Learner (EL)	\$4,000	Annual	4/30/18
Field Trips:			
Camp Sea Lab	\$250	Per Night	4/29/19
Sutter's Fort - Modesto	\$150	One Day	4/29/19
Sutter's Fort - Salida	\$250	One Night	4/29/19

***New for 2021/22**



BOARD POLICY NO.: 2020.057 – Revised

Education of Foster, Mobile and Homeless Youth Policy

Introduction

The Governing Board of Great Valley Academy (“Great Valley Academy” or the “Charter School”) recognizes that Foster, Mobile and Homeless Youth may face significant barriers to achieving academic success due to their family circumstances, disruption to their educational program, and their emotional, social, and other health needs. To enable such students to achieve state and charter school academic standards, Great Valley Academy shall provide them with full access to Great Valley Academy’s educational program and implement strategies identified as required by law and necessary for the improvement of the academic achievement of foster youth in Great Valley Academy’s local control and accountability plan (“LCAP”).

Definitions

- *“Foster youth”* means a child who has been removed from his/her home pursuant to California Welfare and Institutions Code section 309 and/or is the subject of a petition filed under Welfare and Institutions Code section 300 or 602. This includes children who are the subject of cases in dependency court and juvenile justice court.
- *“Child of a military family”* refers to a student who resides in the household of an active duty military member.
- *“Currently Migratory Child”* refers to a child who, within the last 12-months, has moved with a parent, guardian, or other person having custody to the Charter School from another Local Educational Agency (“LEA”), either within California or from another state, so that the child or a member of the child’s immediate family might secure temporary or seasonal employment in an agricultural or fishing activity, and whose parents or guardians have been informed of the child’s eligibility for migrant education services. “Currently Migratory Child” includes a child who, without the parent/guardian, has continued to migrate annually to secure temporary or seasonal employment in an agricultural or fishing activity.
- *“Homeless youth”* is defined as those individuals who lack a fixed, regular, and adequate nighttime residence including those who may be sharing housing with others due to loss of housing or economic hardship. Other criteria includes those living in motels, transitional centers, awaiting foster care placement, and other temporary arrangements.
- *“Pupil participating in a newcomer program”* means a pupil who is participating in a program designed to meet the academic and transitional needs of newly arrived immigrant pupils that has as a primary objective the development of English language proficiency.
- *“Educational Rights Holder” (“ERH”)* means a parent, guardian, responsible adult appointed by a court to make educational decisions for a minor pursuant to Welfare and Institutions Code sections 319, 361 or 726, or a person holding the right to make educational decisions for the pupil pursuant to Education Code section 56055.

- *“School of origin”* means the school that the foster or homeless youth attended when permanently housed or the school in which the foster or homeless youth was last enrolled. If the school the child attended when permanently housed is different from the school in which he/she was last enrolled, or if there is some other school that the child attended within the immediately preceding 15 months, the Charter School liaison for foster and homeless youth, in consultation with and with the agreement of the child and the ERH for the youth, shall determine, in the best interests of the child, the school that shall be deemed the school of origin.
- *“Best interests”* means that, in making educational and school placement decisions for a foster or homeless youth, consideration is given to, among other factors, the opportunity to be educated in the least restrictive educational program and the child’s access to academic resources, services, and extracurricular and enrichment activities that are available to all Charter School students.

Foster, Mobile and Homeless Youth Liaison

In order to help facilitate the enrollment, placement, and transfer of Foster, Mobile and Homeless Youth to Great Valley Academy, the Governing Board shall designate a Foster and Mobile Youth liaison. The Governing Board designates the following position as Great Valley Academy’s liaison for Foster, Mobile and Homeless:

Modesto Campus – Sr. Vice Principal
Homeschool Site – Principal
Salida Campus – Sr. Vice Principal

The Foster, Mobile and Homeless Youth Liaison shall be responsible for the following as it relates to Foster and Mobile Youth:

1. Ensure and facilitate proper educational placement, enrollment in, and checkout of foster youth from Great Valley Academy.
2. Ensure proper transfer of credits, records, and grades when foster youth transfer to or from Great Valley Academy.

When a foster youth is enrolling in Great Valley Academy, the Foster and Mobile Youth Liaison shall contact the school last attended by the student within two (2) business days to obtain all academic and other records. The last school attended by the foster youth shall provide all required records to the new school regardless of any outstanding fees, fines, textbooks, or other items or moneys owed to the school last attended. When a foster youth is transferring to a new school, the Foster and Mobile Youth Liaison shall provide the student’s records to the new school within two (2) business days of receiving the new school’s request, regardless of any outstanding fees, fines, textbooks, or other items or moneys owed to Great Valley Academy.

3. When required by law, notify the foster youth’s attorney and the appropriate representative of the county child welfare agency at least ten (10) calendar days preceding the date of the following:
 - a. An expulsion hearing for a discretionary act under Great Valley Academy’s charter.
 - b. Any meeting to extend a suspension until an expulsion decision is rendered if the decision to recommend expulsion is a discretionary act under Great Valley Academy’s charter. The foster youth’s attorney and the agency representative will be invited to participate.

- c. A manifestation determination meeting prior to a change in the foster youth's placement if the change in placement is due to an act for which the recommendation for expulsion is discretionary and the student is a student with a disability under state and federal special education laws. The foster youth's attorney and the agency representative will be invited to participate.
4. As needed, make appropriate referrals to ensure that students in foster care receive necessary special education services and services under Section 504 of the federal Rehabilitation Act of 1973.
5. As needed, ensure that students in foster care receive appropriate school-based services, such as counseling and health services, supplemental instruction, and after-school services.
6. Develop protocols and procedures for creating awareness for Charter School staff, including but not limited to principals, office managers, and attendance clerks, of the requirements for the proper enrollment, placement, and transfer of foster youth.
7. Collaborate with the county placing agency, social services, probation officers, juvenile court officers, and other appropriate agencies to help coordinate services for Great Valley Academy's foster youth.
8. Monitor the educational progress of foster youth and provide reports to the Principal or designee and the Governing Board based on indicators identified in Great Valley Academy's local control and accountability plan.

This Policy does not grant the Foster and Mobile Youth Liaison authority that supersedes the authority granted under state and federal law to a parent or legal guardian retaining educational rights, a responsible person appointed by the court to represent the child pursuant to Welfare and Institutions Code sections 319, 361 or 726, a surrogate parent, or a foster parent exercising authority under Education Code section 56055. The role of the Foster and Mobile Youth Liaison is advisory with respect to placement options and determination of the school of origin.

The Foster, Mobile and Homeless Youth Liaison shall be responsible for the following as it relates to Homeless Youth:

1. Appropriately identify student as homeless for state reporting purposes.
2. Allow for enrollment without records and assist family with obtaining records.
3. Provide immediate enrollment at Great Valley Academy, if space available. A homeless student does not receive immediate enrollment if a class is full or a waitlist exists for a particular grade level.
4. Assess academic need and provide tutoring or other support and provide time and space for student to complete homework and study.
5. Provide necessary school supplies.
6. Do not punish a student for behavior or attendance arising from their homelessness.
7. Communicate with family and link them to community services.
8. Maintain full confidentiality of their living situation.

School Stability and Enrollment

Great Valley Academy will work to ensure that each foster and homeless youth is placed in the least restrictive educational programs and has access to the academic resources, services, and extracurricular and enrichment activities that are available to all pupils, including, but not limited to, interscholastic sports. All decisions regarding a foster and homeless youth's education and placement will be based on the best interest of the child and shall consider, among other factors, educational stability and the opportunity to be educated in the least restrictive educational setting necessary to achieve academic progress.

Foster, homeless and children of military families have the right to remain in their school of origin if it is their best interest. Great Valley Academy will immediately enroll a foster or homeless youth or child of a military family seeking reenrollment in Great Valley Academy as his/her school of origin (subject to Great Valley Academy's capacity and pursuant to the procedures stated in Great Valley Academy's charter and Board policy).

A foster or homeless youth or child of a military family who seeks to transfer to Great Valley Academy will be immediately enrolled (subject to Great Valley Academy's capacity and pursuant to the procedures stated in Great Valley Academy's charter and Board policy) even if he/she has outstanding fees, fines, textbooks, or other items or monies due to the school last attended or is unable to meet normal enrollment documentation or school uniform requirements (e.g. producing medical records or academic records from a previous school).

At the initial detention or placement, or any subsequent change in placement, a foster youth may continue in his/her school of origin for the duration of the court's jurisdiction. A child of a military family may continue in his/her school of origin as long as the student meets the definition of a child of a military family as described above. Foster youth and children of military families have the right to remain in their school of origin following the termination of the court's jurisdiction or termination of the child's status as a child of a military family, as follows:

1. For students in Kindergarten through eighth grade, inclusive, the student will be allowed to continue in the school of origin through the duration of the academic year in which the student's status changed.

If the foster or homeless youth or child of a military family is transitioning between school grade levels, he/she shall be allowed to continue in the district of origin in the same attendance area to provide him/her the benefit of matriculating with his/her peers in accordance with the established feeder patterns of school districts. A student who is transitioning to a middle school or high school shall be allowed to enroll in the school designated for matriculation in another school district.

The Liaison may, in consultation with and with the agreement of the foster or homeless youth and the ERH for the foster youth, recommend that the foster or homeless youth's right to attend the school of origin be waived and he/she be enrolled in any district school that the student would otherwise be eligible to attend as a resident of the school district or in Great Valley Academy consistent with current enrollment procedures. All decisions shall be made in accordance with the foster or homeless youth's best interests.

Prior to making any recommendation to move a foster or homeless youth from his/her school of origin, the Foster, Mobile, and Homeless Youth Liaison shall provide the foster or homeless youth and the foster youth's ERH with a written explanation of the basis for the recommendation and how the recommendation serves the child's best interests.

If any dispute arises regarding a child's request to remain in Great Valley Academy as the child's school of origin, the child has the right to remain in Great Valley Academy pending resolution of the dispute. The dispute shall be resolved in accordance with the existing Charter School dispute resolution process.

Transportation

Great Valley Academy shall not be responsible for providing transportation to allow a foster youth to attend school, unless there is an agreement with a local child welfare agency that Great Valley Academy assumes part or all of the transportation costs in accordance with Section 6312(c)(5) of Title 20 of the United States Code, or unless required by federal law. Great Valley Academy is not prohibited from providing transportation, at its discretion, to allow a foster youth to attend school.

In accordance with Section 6312(c)(5) of Title 20 of the United States Code, Great Valley Academy shall collaborate with local child welfare agencies to develop and implement clear written procedures to address the transportation needs of foster youth to maintain them in their school of origin, when it is in the best interest of the youth.

For any student who has an individualized education program ("IEP"), the student's IEP team will determine if the student requires special education transportation as a related service regardless of the student's status as a foster youth or child of a military family.

A homeless youth will be provided public transportation vouchers purchased by Great Valley Academy and provided to the family if a homeless student does not have transportation to/from school.

Effect of Absences on Grades

The grades of a foster or homeless youth shall not be lowered for any absence from Great Valley Academy that is due to either of the following circumstances:

- a. A decision by a court or placement agency to change the student's placement, in which case the student's grades shall be calculated as of the date he/she left school.
- b. A verified court appearance or related court-ordered activity.

Transfer of Coursework and Credits

Great Valley Academy shall accept coursework satisfactorily completed by a foster, mobile, or homeless youth while attending another public school**, a juvenile court school, a charter school, a school in a country other than the United States, or a nonpublic, nonsectarian school or agency even if the pupil did not complete the entire course and shall issue that pupil full or partial credit for the coursework completed.

If the foster, mobile, or homeless youth did not complete the entire course, he/she shall be issued partial credit for the coursework completed and shall not be required to retake the portion of the course that he/she completed at another school. Whenever partial credit is issued to a foster, mobile, or homeless youth in any particular course, he/she shall be enrolled in the same or equivalent course, if applicable, so that he/she may continue and complete the entire course.

Eligibility for Extracurricular Activities

A pupil who is in foster care or homeless, whose residence changes pursuant to a court order or decision of a child welfare worker shall be immediately deemed to meet all residency requirements for

participation in interscholastic sports or other extracurricular activities.

Waiver of Fees for Afterschool Programs

Great Valley Academy shall not charge any student who Great Valley Academy knows is currently in foster care or homeless any family fees associated with an After School Education Program operated by Great Valley Academy. This should be evaluated every 30 days.

Waiver of Fees for Meal Program

Foster, mobile and homeless youth are automatically eligible for free meals and snacks as part of the school lunch program.

Student Records

When Great Valley Academy receives a transfer request and/or student records request for the educational information and records of a foster or homeless youth from a new LEA, Great Valley Academy shall provide these student records within two (2) business days. Great Valley Academy shall compile the complete educational record of the pupil, including but not limited to a determination of seat time, full or partial credits earned, current classes and grades, immunization and other records, and, if applicable, a copy of the pupil's special education records including assessments, IEPs, and/or 504 plans. All requests for student records will be shared with the Liaison, who shall be aware of the specific educational record keeping needs of foster, mobile or homeless youth.

In accordance with Great Valley Academy's Educational Records and Student Information Policy, under limited circumstances, Great Valley Academy may disclose student records or personally identifiable information contained in those records to certain requesting parties including but not limited to a foster family agency and state and local authorities within a juvenile justice system, without parental consent.

Complaints of Noncompliance

Complaints of noncompliance with this Policy shall be governed by Great Valley Academy's Uniform Complaint Procedures. A copy of the Uniform Complaint Policy and Procedures is available upon request at the main office or on our website at www.greatvalleyacademy.com.

****** For purposes of coursework completed by a student who is a child of a military family, "public school" includes schools operated by the United States Department of Defense.

Date Approved:

Signature, President or Secretary

Board Action:

AYES:

NAYS:

ABSENT:

ABSTAIN:

Title I, Part A School-Level Parent and Family Engagement Policy

Great Valley Academy

The school is committed to parent and family engagement, with the support of Title I, Part A. While parents and families in the school are diverse in culture, language and needs, they all share a commitment to academic success of their children. Therefore, the school strives to lead our students to success with the full support and involvement of families and the community.

This policy describes the means for carrying out designated Title I, Part A parent and family engagement requirements pursuant to ESSA Section 1116(c).

Each school served under this part shall jointly develop with, and distribute to, parents and family members of participating children a written parent and family engagement policy, agreed on by such parents, that shall describe the means for carrying out the requirements of subsections (c) through (f). ESSA Section 1116[b][1]

To involve parents in the Title I, Part A programs, the following practices have been established:

- The school will
 - convene an annual meeting to inform parents about the Title I Program.
 - hold parent involvement/education meetings at varying times.
 - involve parents of participating students in an organized, ongoing, and timely way, in the planning, review, and improvement of its Title I programs and parental involvement policy.
 - educate staff members in the value of parent and family member contributions and how to work with them as equal partners.

Communication and Accessibility:

The school **distributes information** related to school and parent programs, meetings, and other activities to Title I, Part A parents in a format and language that the parents understand (ESSA Section 1116[e][5]).

If requested by parents of Title I, Part A students, the school provides opportunities that allow the parents to participate in decisions relating to the education of their children (ESSA Section 1116[c][4][C]).

The school provides opportunities for the participation of all Title I, Part A parents, including parents with limited English proficiency, parents with disabilities, and parents of migratory students. Information and school reports are provided in a format and language that parents understand (ESSA Section 1116[f]).

The school provides parents of Title I, Part A students with timely information about Title I, Part A programs (ESSA Section 1116[c)(4)[A]).

The school convenes an annual meeting to inform parents about Title I, Part A requirements and about the right of parents to be involved in the Title I, Part A program (ESSA Section 1116[c][1]). Details about the annual meetings:

The school offers a flexible number of meetings for Title I, Part A parents, such as meetings in the morning or evening (ESSA Section 1116[c][2]). Details about the meetings:

Each spring, the School Administration will discuss a flexible meeting schedule with stakeholders for the following year. In addition, the school will:

- make every effort to schedule meetings at a variety of times to allow parents and family members opportunities to attend.
- provide childcare/ transportation, as funding allows, so parents may attend the meeting.
- hold the Title 1 Parent Meeting each fall at a convenient time for parents.
- notify parents in a format, and where practicable, a language they will understand.
- provide timely information in the following ways:
 - school website and social media
 - letters home, including email communication
 - in person meetings and other forms of two way communication
- accommodate a request for a meeting with any staff member or school administrator working with their student.
- provide the opportunity for public comment at regularly scheduled school meetings.
- provide an annual LCAP survey.
- consider the various needs of stakeholders when sending communication or providing trainings, including needs resulting from disability, language and mobility barriers.

Engagement of Parents:

The school involves parents in the development of required Parent and Family Engagement Plan when it:

- provides support for **parental involvement activities** requested by Title I, Part A parents (ESSA Section 1116[e][14]).
- involves parents of Title I, Part A students in an organized, ongoing, and timely way, in the planning, review, and improvement of the school's Title I, Part A programs and the Title I, Part A parent involvement policy (ESSA Section 1116[c][3]).
- provides parents of Title I, Part A students with an explanation of the curriculum used at the school, the assessments used to measure student progress, and the proficiency levels students are expected to meet (ESSA Section 1116[c][4][B]).

The school will engage families in the decision-making process in the following ways:

- include adequate representation of parents and family members of participating students on advisory councils.
- elicit feedback from and share out to stakeholder groups information pertaining to Title I, Part A programs and the Title I, Parent Involvement Policy

The school will provide information on curriculum, assessments and student progress in the following ways:

- in person meetings, including parent-teacher conferences
- parent education trainings/seminars
- written communication, including email
- Schoolwise Parent/Student Portal

Building Capacity:

Per ESSA Section 1116[e][1-4]), the school:

- **coordinates and integrates** the Title I, Part A parental involvement program with other programs, and conducts other activities, such as parent resource centers, to encourage and support parents in more fully participating in the education of their children
- provides Title I, Part A parents with **materials and training** to help them work with their children to improve their children's achievement.
- provides Title I, Part A parents with **assistance in understanding the state's academic content standards**, assessments, and how to monitor and improve the achievement of their children.
- engages Title I, Part A parents in **meaningful interactions** with the school. The school supports a partnership among staff, parents, and the community to improve student academic achievement.

Meaningful interactions may include:

- community partnerships
- two-way communication
- remote or virtual access to allow parents/stakeholders to participate from any location
- site parent liaison support, as available
- annual site activities (e.g. movie night aligned to educating parents on academic standards; lunch with guest speaker on specific topic)

Assistance may include:

- opportunities for parents to volunteer and participate in their student's class and to observe classroom activities
- materials and trainings to address academic and social-emotional needs

- include topics, as appropriate, identified by parents/family members
- provide strategies to increase foundational math and literacy skills

Trainings may include:

- research-based curriculum resources in trainings
 - includes, academic and/or social-emotional learning
- community partner guest speakers
- community resources (including local Behavioral Health agencies)
- opportunities for parents to volunteer and participate in their student's class and to observe classroom activities, when appropriate.

Staff Training:

With the assistance of Title I, Part A parents, the school **educates staff members in the value of parent contributions**, and in how to work with parents as equal partners (ESSA Section 1116[e][3]).

The school may offer:

- Staff trainings and/or train the trainer model for parent and family engagement
- Annual Title I Meeting and other LEA provided parent and family engagement resources
- New staff and continuing education training
- Multi-campus parent and family engagement coordinator support
- Periodical newsletter and calendar

This policy was adopted by Great Valley Academy on August 30, 2021 and will be in effect for the period of 2021-2022 school year.

The school will distribute the policy to all parents of students participating in the Title I, Part A program on, or before: 10/1/2021.

Name and Title of Authorized Official

Signature of Authorized Official:

Date:



Board Meeting Dates 2021.2022

August 2, 2021 – 4:30 pm IF NEEDED

August 30, 2021 - 4:30 pm

September 27, 2021 - 4:30 pm

October 25, 2021- 5:30 pm

November 29, 2021- 5:30 pm

January 31, 2022- 5:30 pm

February 28, 2022- 5:30 pm

March 28, 2022- 5:30 pm

April 25, 2022- 5:30 pm

May 23, 2022- 5:30 pm

June 27, 2022- 5:30 pm

* Beginning October 25, 2021 meetings will be held in person starting at 5:30 p.m.
at 1209 Woodrow Ave., Suite A4 Modesto CA 95350

GREAT VALLEY ACADEMY
Regular Meeting of the Board of Trustees
September 27, 2021 4:30 pm
~via Zoom

This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.

The Board of Directors ("Board") and employees of Great Valley academy shall meet via Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at

<https://us02web.zoom.us/j/89198542360?pwd=eHJtYjc4cmMyQTQwQ3Y2TTNNN0dvUT09>

You may also call in using the Zoom phone number +1 669 900 6833 US Meeting ID **89198542360**. Members of the public who wish to comment during the Board meeting may email in comments to publiccomment@greatvalleyacademy.com and they will be read during the public participation segment of the meeting. Comments must be received by 12:00 p.m. on the day of the meeting. Members of the public calling in will be given the opportunity to address the Board during the public participation segment of the meeting. Individual comments will be limited to three (3) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Access to Board Materials: You may request a copy of the written materials submitted to the Board by sending a request to publiccomment@greatvalleyacademy.com.

Disability Access: A copy for disability-related modifications or accommodations to participate in this public meeting should be made at least 24 hours prior to the meeting by emailing publiccomment@greatvalleyacademy.com. Efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

AGENDA

a. CALL TO ORDER

b. COMMUNICATIONS

- a. PUBLIC PARTICIPATION**
- b. MODESTO PRINCIPAL REPORT**
- c. SALIDA PRINCIPAL REPORT**
- d. HOMESCHOOL PRINCIPAL REPORT**
- e. CHIEF OPERATING OFFICER'S REPORT**
- f. CHIEF EXECUTIVE OFFICER'S REPORT**
- g. FOUNDER'S REPORT**

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

c. APPROVAL OF AGENDA AND ORDER OF AGENDA

d. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of August 30, 2021

e. ACTION ITEMS

f. INFORMATION AND DISCUSSION

- a. Monthly Financials

g. FUTURE AGENDA ITEMS

a. FUTURE REGULAR BOARD MEETINGS – October 25, 2021

~1209 Woodrow Ave., Suite A4 Modesto CA
5:30 pm

h. FINALADJOURNMENT

VISION

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Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Aug. 26- Sept. 16, 2021

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	77.67	92.15	78.52	91.10
1	74	70.33	91.98	69.63	89.97
2	83	76.73	90.93	77.19	90.82
3	93	87.40	89.66	87.41	90.39
4	90	84.13	91.89	83.96	90.62
5	76	69.33	89.47	70.26	90.39
6	91	83.00	87.61	83.67	88.87
7	102	94.20	90.39	96.37	91.39
8	77	72.87	91.34	72.78	91.53
Total	771	715.67	90.55	719.78	90.57

2. Key Accomplishments:

7th & 8th Grade Electives
SCOE Science Training/ In Service Day
NWEA Testing
K-2 Benchmarks
Aligned SST process/RAMP Math Assessment
Spirit Day- College and Career Day
School Wide Family Meeting Topics
40 Book Challenge

3. Upcoming Key Events/Activities:

Continue Partnership with SCOE Math/Science
Parent Conferences Oct. 6-8
Updated Character Reflections
Fall Break Oct. 11-15

Great Valley Academy Salida

Charter School Monthly Summary Report

September 27, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA %
K	81	72.67	87.44	78.78	89.21
1	97	89.75	89.47	90.08	89.07
2	90	80.58	89.53	81.78	89.68
3	99	88.17	87.71	90.64	91.37
4	89	82.50	91.38	82.53	91.74
5	95	85.83	88.50	88.18	88.93
6	91	84.08	91.53	84.36	91.10
7	79	71.75	89.84	72.21	91.03
8	83	73.25	89.05	74.07	90.25
Total	804	728.58	89.37	737.75	90.25

2. Key Accomplishments:

- a. NWEA testing complete
- b. School pictures complete
- c. SCOE science training ongoing
- d. SCOE math training ongoing
- e. Initial safety walk with new safety resource
- f. Sept. 24th: Kinder shootout culminating event
- g. Friday assemblies re-instated
- h. Morning Slides proving beneficial

3. Upcoming Key Events/Activities:

- a. Oct. 6th – 8th: Parent/teacher conferences
- b. Oct. 11th – 15th: Fall Break

Great Valley Academy Homeschool

Charter School Monthly Summary Report

September 27, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	8	6.42	100	6.42	100
1	9	8	88	8	88
2	6	6	100	6	100
3	2	2	100	2	100
4	10	1	100	1	100
5	4	4	100	4	100
6	7	6.5	93.2	6.5	93.2
7	5	5	100	5	100
8	7	7	100	7	100
Total	58	54.9	97.38	54.9	97.38

2. Key Accomplishments:

- a. September 1st-24th – NWEA Fall Testing
- b. September 3rd – 1st Assignment Work Record (AWR) with new format completed
- c. September 7th – Homeschool Parent Orientation
- d. September 10th – Micke Grove Regional Park Trip
- e. September 10th – Site Safety Walk-through

3. Upcoming Key Events/Activities:

- a. September 28th – NWEA Principals Training – New Student Reports
- b. September 30th – Spirit Day: Family Heritage/Culture Day
- c. October 1st – Assignment Work Record (AWR) due
- d. October 5th – Homeschool Parent Orientation
- e. October 11th-15th – Fall Break
- f. October 22nd – Resendiz Farms Trip

Chief Operating Officer's Report
September 27, 2021
Board Meeting



Process and Policy Updates

- ❖ COVID Contact Tracing School Protocols – Ongoing
- ❖ COVID Onsite Testing Capabilities for Staff & Students – Complete
- ❖ Supervisor & Managers Training – Complete

Multi-Campus Responsibilities

- ❖ Launch Manager's Intranet – Complete
- ❖ Interviewing & Hiring for new Multi-Campus Positions – Complete
- ❖ Campus Hazard Inspections – Complete
- ❖ Budget Revision – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Marketing Plans for 2022 Enrollment Season – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Launch of SchoolWise Parent Portal – October 2021
- ❖ Certificated Salary Schedule Analysis – Begin Fall 2021
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ August 2021
 - ❑ 4,671 Users Visited (87.9% New/12.1% Returning)
 - ❑ 17,960 Page Views
 - ❑ Users Averaged 1:46 Minutes on the Site
 - ❑ 61.05% Mobile – 37.98% Desktop – 0.97% Tablet
 - ❑ Type: Organic 64.2% – Direct 31.0% – Referral 3.8% – Social 1.0%

Training

- ❖ CDPH Onsite COVID Testing Training – Complete
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ COVID Return to Work Safely Protocols – Ongoing
- ❖ SCOE CBO Meetings – Ongoing



Chief Executive Officer's Report
September 27, 2021
Board Meeting

State Accountability

- No data available (no testing 2020/21)

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Ongoing participation in 360 Accelerator
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position

Homeschool

- Onboarding and support of new principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding



Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021



Founders Report
Great Valley Academy School Board
September 27, 2021

We now have established the pull out program 4 times per week for a 6 week rotation. The two new GVS staff hires are working out very well in Modesto. The Salida part time new hire is just beginning the training program, but seems excited about the position.

In addition we are doing “push-in” programs in 1st and 2nd and kindergarten extension. This is not only to help students become better learners and introduce the new lower elementary teachers to GVS.

Vision examinations for staff and on campus students are done on a weekly basis. It is interesting to me that in a “normal” year, I may see 6-10 students with refractive problems like nearsightedness, farsightedness or astigmatism. This year I have seen many more than that in 1 month. I feel this is an indicator of the damage the use of cell phones and computers have on young eyes.

Over the past several years, GVA has created a child development based reading program, Smart Reading System (SRS). This school year the principals mentioned a similar program for learning math concepts. I have developed an outline for a math program and the principals, approve of the direction, so Leah Franklin and I have started a conversation on the next steps in developing this program.

Sincerely,

Eldon Rosenow, Founder

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
August 30, 2021

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Vincent Jamison, Susan Nisan

Members Absent: Twila Tosh

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Dr. Eldon Rosenow, Mike Ruehle, Russ Howell, Tarah Heilman, Kelli Rupe

Audience Present: None

Call to Order: Mr. Payne called the meeting to order at 4:31 p.m.

Communications: **COMMUNICATIONS**

Written

Communications: None

Public Participation: None

Modesto Principal

Report: Mr. Ruehle spoke about looking for ways to get back to business. Assemblies per grade level being one of the changes this year. The first Spirit Day of the year was last Friday and it was a really fun, positive thing!

Salida Principal

Report: Mr. Howell also spoke of getting staff and students back to normal. Drop off and pick up has been challenging, but it is getting better. Everyone is excited to be back!

Homeschool Principal

Report: Mrs. Heliman talked about the challenge of big changes in Homeschool staff and the timing of them. She is encouraged by the huge network of support and believes that they are a great team!

Chief Operating

Officer's Report: Mrs. Meeks talked about the changes and challenges of COVID protocol including contact tracing. The positive side is that we are doing all of this so that kids can be in class and have the full GVA learning experience!

MINUTES

Regular Meeting of the Board

August 30, 2021

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Chief Executive

Officer's Report:

Ms. Silvestre Franklin expressed her gratitude to the GVA staff for making kids our priority. The true celebration is having kids in class due to the hard work that the entire staff has put in. She also spoke of being able to test students and being grateful for being able to make it convenient for our kids and families.

Founder's Report:

Dr. Rosenow said that running GVS 4 days a week is both a challenge and a celebration. There are 2 new staff members that are doing great and the kids are doing really well!

Approval of Agenda/ Order of Agenda:

The motion was made by Mr. Jamison, seconded by Mrs. Meraz, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mrs. Meraz, seconded by Mr. Payne, approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Action Items:

ACTION ITEMS

a. The motion was made by Mr. Jamison, seconded by Mrs. Nisan approving the Modesto Unaudited Actuals. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

August 30, 2021

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Action Items Cont'd:

b. The motion was made by Mrs. Meraz, seconded by Mrs. Nisan approving the Salida Unaudited Actuals. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

c. The motion was made by Mrs. Nisan, seconded by Mr. Jamison approving the updated Home Study Based Independent Study Policy. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

d. The motion was made by Mrs. Meraz, seconded by Mrs. Nisan approving the 2021-2022 Stipends. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

e. The motion was made by Mr. Jamison, seconded by Mrs. Nisan approving revised Policy#2020.057 Education of Foster, Mobile and homeless Youth Policy. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

f. The motion was made by Mrs. Nisan, seconded by Mrs. Meraz approving the Family and Parent Engagement Policy. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Jamison

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

August 30, 2021

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Information and

Discussion:

Updated 2021-2022 Board Meeting Calendar

Beginning with the Board Meeting of October 25, 2021 we will be meeting in person at 5:30 p.m. at 1209 Woodrow Ave., Suite A4 Modesto, CA 95350

Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – September 27, 2021

~ 4:30 pm Via Zoom

Adjournment:

The meeting was adjourned at 5:06 p.m.

Great Valley Academy Modesto
August 2021

	A Actual YTD Jul 21 - Aug 21	B Original Budget YTD Jul 21 - Aug 21	C Estimated Balance of year Sept 21-Jun 22	D Original Budget Balance of year Sept 21-Jun 22	F Original Annual Operating Budget	E Estimated Annual Spending A + C
Ordinary Income/Expense						
Income						
8000 · Revenue Limit Sources	0	572,721	8,290,756	7,718,035	8,290,756	8,290,756
8100 · Federal Revenue	0	117,705	1,300,605	1,182,900	1,300,605	1,300,605
8300 · Other State Revenues	15,477	400,432	615,266	230,311	630,743	630,743
8600 · Other Local Revenue	80,532	29,004	377,968	429,496	458,500	458,500
8700 · Selpa	0	46,304	463,040	416,736	463,040	463,040
Total Income	96,009	1,166,166	11,047,635	9,977,477	11,143,644	11,143,644
 Gross Profit	 96,009	 1,166,166	 11,047,635	 9,977,477	 11,143,644	 11,143,644
Expense						
1000 · Certificated Salaries	376,089	369,728	3,530,205	3,536,566	3,906,294	3,906,294
2000 · Classified Salaries	238,590	234,667	1,992,654	1,996,578	2,231,245	2,231,245
3000 · Employee Benefits	153,831	182,974	1,551,388	1,522,245	1,705,219	1,705,219
4000 · Books & Supplies	170,697	183,355	929,433	916,775	1,100,130	1,100,130
5000 · Services & Other Operating Exp	115,294	290,023	1,624,841	1,450,113	1,740,136	1,740,136
6000 · Capital Outlay	7,700	0	70,300	78,000	78,000	78,000
7430 · All Other Financing Uses	35,344	35,344	212,035	212,035	247,379	247,379
Total Expense	1,097,545	1,296,089	9,910,858	9,712,313	11,008,402	11,008,402
 Net Ordinary Income	 -1,001,536	 -129,923	 1,136,777	 265,164	 135,241	 135,241

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,554,874.98	5,392,183.70	5,188,989.55	5,516,816.71	5,317,170.24	5,143,097.74	5,578,105.72	5,476,430.45	5,334,865.84		
LCFF Revenue	8011	0.00	0.00	419,797.44	419,797.44	419,797.44	419,797.44	419,797.44	513,085.76	513,085.76	513,085.76	513,085.76	513,085.76	0.00	4,664,416.00
EPA Funding	8012		0.00	428,341.00				428,341.00		428,341.00			428,341.00	0.00	1,713,364.00
In-Lieu of Taxes Charter Funding	8096		0.00	212,559.12	141,706.08	141,706.08	141,706.08	141,706.08	141,706.08	170,047.30	170,047.30	170,047.30	170,047.30	170,047.30	1,771,326.00
Selma Prop Tax	8097							70,825.00						70,825.00	141,650.00
Federal IDEA	8181													118,486.00	118,486.00
Federal Food	8220		0.00	0.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	75,422.00	414,821.00
Title 1, Part A	8290													117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			162,398.26				162,398.26		162,398.26				162,398.22	649,593.00
State Food Revenue	8520		0.00	0.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	4,000.00	22,000.00
Educator Effectiveness	8550													0.00	0.00
Mandated Cost Reimb	8550							15,282.05						0.00	15,282.05
Lottery	8560							39,889.35			39,889.35			53,185.80	132,964.50
Lottery, prop 20	8561										0.00			21,717.54	43,435.07
In Person Inst Grant 7422	8590		0.00	128,909.00									21,717.54	0.00	128,909.00
Expanded Lrng Opp Grant 7425	8590		0.00	271,523.00										0.00	271,523.00
Exp Lrng Opp Grant Paras 7426	8590													0.00	0.00
Other	8590													11,629.00	11,629.00
Prior Year Payments	prior year	15,477.00	0.00					833.33	833.33	833.33				(12,976.99)	5,000.00
Uniform Sales	8638	12,919.75	35,716.26		5,000.00				10,000.00					(48,636.01)	20,000.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	12,049.24	258,500.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	2,000.00	15,000.00	75,000.00	0.00	0.00	0.00	0.00	15,000.00	15,000.00	15,000.00	42,138.33	180,000.00
Selma	8792		0.00	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	46,304.00	463,040.00
TOTAL REVENUES		42,011.55	53,997.19	1,688,743.09	684,429.79	739,429.79	1,270,451.10	775,977.47	768,551.44	1,377,631.92	840,948.68	801,059.33	1,256,117.86	844,294.42	11,143,643.62
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	473,105.81	0.00	3,906,294.02
Classified Salaries	2000-2999	88,140.34	150,450.15	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	167,090.38	0.00	2,231,244.92
Employee Benefits	3000-3999	30,042.33	123,788.57	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	239,681.13	0.00	1,705,218.83
Books & Supplies	4000-4999	73,441.55	97,255.45	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	104,335.50	0.00	1,100,130.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	319,739.78	0.00	1,740,135.56
Capital Outlay	6000-6999	0.00	7,700.00	0.00	25,000.00	0.00	0.00	33,000.00	0.00	0.00	0.00	0.00	12,300.00	0.00	78,000.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	52,989.64	0.00	247,379.00
TOTAL EXPENDITURES		340,116.96	757,427.67	942,623.94	967,623.94	942,623.94	942,623.94	975,623.94	942,623.94	942,623.94	942,623.94	942,623.94	1,369,242.24		11,008,402.33
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	746,119.15	(283,194.15)	(203,194.15)	327,827.16	(199,646.47)	(174,072.50)	435,007.98	(101,675.26)	(141,564.61)	(113,124.38)	844,294.42	135,241.29
Accruals Received		73,335.00		938,000.00	120,502.87										1,131,837.87
Liabilities		(544,380.68)	(18,745.28)												
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,554,874.98	5,392,183.70	5,188,989.55	5,516,816.71	5,317,170.24	5,143,097.74	5,578,105.72	5,476,430.45	5,334,865.84	5,221,741.46		

Great Valley Academy Salida
August 2021

	A Actual YTD	B Original Budget YTD	C Actual Estimated Balance of year	D Original Annual Operating Budget	F Estimated Annual Spending
	Jul 21 - Aug 21	Jul 21 - Aug 21	Sept 21-Jun 22	Sept 21-Jun 22	A + C
Ordinary Income/Expense					
Income					
8000 · Revenue Limit Sources	0	684,486	7,646,195	7,646,195	7,646,195
8100 · Federal Revenue	0	0	974,454	974,454	974,454
8300 · Other State Revenues	0	380,744	598,889	598,889	598,889
8600 · Other Local Revenue	22,655	23,421	304,845	327,500	327,500
8700 · SELPA	0	71,402	428,411	428,411	428,411
Total Income	22,655	1,160,053	9,952,794	9,975,449	9,975,449
 Gross Profit	22,655	1,160,053	9,952,794	9,975,449	9,975,449
 Expense					
1000 · Certificated Salaries	311,662	339,965	3,351,866	3,663,528	3,663,528
2000 · Classified Salaries	181,980	205,472	1,661,450	1,843,431	1,843,431
3000 · Employee Benefits	185,478	167,827	1,415,924	1,601,402	1,601,402
4000 · Books & Supplies	94,613	187,844	872,982	967,595	967,595
5000 · Services & Other Operating Exp	94,509	158,889	1,174,608	1,269,118	1,269,118
6000 · Capital Outlay	11,275	0	66,725	78,000	78,000
7430 · All Other Financing Uses	59,740	59,740	334,172	393,912	393,912
Total Expense	939,257	1,119,737	8,877,728	9,816,985	9,816,985
 Net Ordinary Income	-916,602	40,316	1,075,066	158,464	158,464

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	2,581,346.80	2,693,281.32	2,603,259.58	2,659,497.40	2,663,755.46	2,683,617.56	2,869,968.34	2,950,996.54	3,001,732.44		
LCFF Revenue	8011	0.00	0.00	548,477.28	548,477.28	548,477.28	548,477.28	548,477.28	670,361.12	670,361.12	670,361.12	670,361.12	670,361.12	0.00	6,094,192.00
EPA Funding	8012		0.00	0.00	41,230.00		41,230.00			41,230.00				41,230.00	164,920.00
In-Lieu of Taxes Charter Funding	8096		0.00	150,132.96	100,088.64	100,088.64	100,088.64	100,088.64	100,088.64	120,106.37	120,106.37	120,106.37	120,106.37	120,106.37	1,251,108.00
Selpa Prop Tax	8097							67,987.50						67,987.50	135,975.00
Federal IDEA	8100-8299												0.00	115,665.00	115,665.00
Federal Food	8220		0.00	0.00	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	68,189.94	375,044.68
Title 1	8290				74,205.00									0.00	74,205.00
Fed Covid Funds ESSER II & III	8290			102,384.88			102,384.88			102,384.88				102,384.88	409,539.50
State Food Revenue	8520		0.00	0.00	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	3,454.55	19,000.00
Mandated Cost Reimb	8550						14,644.68						0.00	0.00	14,644.68
Lottery	8560							38,292.30			38,292.30			51,056.40	127,641.00
Lottery, prop 20	8561										0.00		41,696.06	0.00	41,696.06
In Person Instruction Grant	8590		0.00	257,817.00										0.00	257,817.00
Expanded Learning Opp Grant	8590		0.00	121,927.00										0.00	121,927.00
Other	8590												0.00	11,163.00	11,163.00
Prior Year Payments	prior year	0.00	0.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	1,000.00	5,000.00
Other Local (Kids Care)	8689	7,661.35	14,820.07	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	15,435.25	227,500.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	2,000.00	30,000.00	48,000.00	0.00	0.00	0.00	0.00	0.00	8,000.00	8,000.00	3,826.38	100,000.00
Selpa	8792	0.00	0.00	35,700.92	35,700.92	35,700.92	35,700.92	35,700.92	35,700.92	38,556.99	38,556.99	38,556.99	0.00	98,534.53	428,411.00
TOTAL REVENUES		7,815.61	14,839.43	1,279,028.37	843,652.41	787,447.41	897,706.97	845,727.21	861,331.25	1,027,819.93	922,497.35	892,205.05	895,344.12	700,033.77	9,975,448.92
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	459,607.31	0.00	3,663,527.52
Classified Salaries	2000-2999	55,820.29	126,160.12	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	180,122.08	(0.00)	1,843,430.84
Employee Benefits	3000-3999	66,882.84	118,595.32	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	162,652.79	(0.00)	1,601,402.36
Books & Supplies	4000-4999	23,814.63	70,797.97	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	147,286.08	(0.00)	967,594.70
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	222,769.92	(0.00)	1,269,117.50
Capital Outlay	6000-6999	0.00	11,275.00	0.00	15,000.00	36,000.00	0.00	0.00	0.00	0.00	0.00	0.00	15,725.00	0.00	78,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	65,342.11	0.00	393,912.00
TOTAL EXPENDITURES		255,320.03	683,937.22	841,469.15	856,469.15	877,469.15	841,469.15	841,469.15	841,469.15	841,469.15	841,469.15	841,469.15	1,253,505.29		9,816,984.92
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	437,559.22	(12,816.74)	(90,021.74)	56,237.82	4,258.06	19,862.10	186,350.78	81,028.20	50,735.90	(358,161.17)	700,033.77	158,464.00
Accruals Received		25,326.89	55,932.54	1,236,504.00	124,751.27										1,386,582.16
Liabilities Accrued (Paid)		(183,979.28)	0.00												
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	2,581,346.80	2,693,281.32	2,603,259.58	2,659,497.40	2,663,755.46	2,683,617.56	2,869,968.34	2,950,996.54	3,001,732.44	2,643,571.27		

Regular Meeting of the Board of Trustees

October 25, 2021

Monday, 5:30 PM

Great Valley Academy

1209 Woodrow Ave. Suite A-4

Modesto, CA 95350

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

c. MODESTO PRINCIPAL'S REPORT

d. SALIDA PRINCIPAL'S REPORT

e. HOMESCHOOL PRINCIPAL'S REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT- Verbal Report Only

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of September 27, 2021

f. ACTION ITEMS

- a. Approve Modesto ESSER Plan
- b. Approve Salida ESSER Plan

g. INFORMATION AND DISCUSSION

- a. Monthly Financials
- b. Modesto Educator Effectiveness Local Plan
- c. Salida Educator Effectiveness Local Plan

h. FUTURE AGENDA ITEMS

- a. **NEXT REGULAR BOARD MEETING** – November 29, 2021 5:30 PM
~1209 Woodrow Ave., Suite A4 Modesto CA

i. FINAL ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.

Public Comment

Today I'm here to Encourage you to do what you can to continue to protect what we have created in This amazing charter school. I'm Advocating for my children, my friends, my coworkers and my community.

We, as staff and parents, are facing a choice to either get vaccinated or leave teaching. Parents are about to be told to vaccinate their children with the Covid vaccine in order to continue attending public and private schools. As we speak, parents are researching and listening and preparing to make the best choice for their child, as this mandate awaits FDA approval.

The best way to keep GVA thriving is to continue to keep families and staff informed during this unprecedented time in education. If we can avoid losing families and staff, I urge you to take action to do so. Stanislaus County Sheriff Jeff Dirkse will not be enforcing mandates for his organization and I hope that our organization joins him. If this board has no choice but to follow the state's upcoming mandate in January or July, once the vaccine is approved by the FDA, then our stakeholders need to know. Please decide and inform stakeholders if exemptions will be accepted or not at GVA. If accepted, please inform us of the format and timeframe that you need these by. If we need our voices heard at a different local level, please guide us in that direction. This will help us make the best informed decisions.

If you, as a board of directors, DO have a choice and are willing to deny this mandate, our school will be better for it. GVA student enrollment will NOT drop, staff will not continue to leave and our culture can continue to thrive. We can continue to do the work that we believe in and love.

Some of the signatures below represent approximately 30% of our staff that join me in urging you to stand up for our school. The signatures also include parent stakeholders. As indicated on the second line. I hope that you support us in our right to make our own choice on whether or not to get a Covid vaccine and keep all stakeholders informed of their options at GVA. Stakeholders eagerly await your response. Thank you for allowing me to address you and advocate for those that could not attend.

Name Courtney Hogan

Type of Stakeholder (circle) parent staff

Name Thomas Vaughan

Type of

Name Carolyn Boski

Type of Stakeholder (circle) parent staff

Signature Carolyn Boski

Name Mia Austin

Type of Stakeholder (circle) parent staff

Signature Mia Austin

Name Nate Matthews

Type of Stakeholder (circle) parent staff

Signature Nate Matthews

Name Brittany Shull
Type of Stakeholder (circle) parent staff ✓
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Name [Signature]
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Name DANIEL Austin
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Name Jessica Smith
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Name Laura Cornell
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Name John Marthe
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Name Brandon Cornell
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Name India Mcke
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Name Crystal Carr
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Name Darla Saunders
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Name Melissa Young
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Name Janeen Dykxhoorn
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Name Tanya Zavala

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Name Grace Barra

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Name Matt Weinapple

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Name Michael McKee

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Name Melissa Woods

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Name Stephanie Hegarty

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Name Jessica Reyes

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Name Desiree Ruiz

Type of Stakeholder (circle) parent staff

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Name Anna Claussen

Type of Stakeholder (circle) parent staff

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Name Nidia Velasco

Type of Stakeholder (circle) parent staff

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Name HOLLIE TUGGLE

Type of Stakeholder (circle) parent staff

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Name Kon Ortega

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Name Julie Gilbreath

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Name Brandy McThorn

Type of Stakeholder (circle) parent staff

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Name Orestes Jaquez

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Name Yael Ramirez

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Name Joelyn Benitez

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Name Chloe Vargas

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Name Courney Choayin

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Name Sarah Moore

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Name Erin Court

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Name Margaret B. Werner

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Name Sarah Davis

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Name Brent Gilbreath

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Name D. Fernandez

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Name Erica Fausto
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Name Crystal Tanaka
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Name Michelle Waltrip
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Name Amber Bamey
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Signature Amber Bamey
Name Giovanna Thomason
Type of Stakeholder (circle) parent staff
Signature Giovanna Thomason
Name Derek Waltrip
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Signature Derek Waltrip
Name Araceli Venegas
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Signature Araceli Venegas
Name Jennifer Coleman
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Signature Jennifer Coleman

Name Megan Barajas
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Signature Megan Barajas
Name Cynthia Madrid
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Signature Cynthia Madrid
Name Lacey Woods
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Signature Lacey Woods
Name Elvia Martinez
Type of Stakeholder (circle) parent staff
Signature Elvia Martinez
Name Elizabeth Loudermilk
Type of Stakeholder (circle) parent staff
Signature Elizabeth Loudermilk

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Sept. 20- Oct. 8, 2021

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	83	77.67	89.55	75.40	86.61
1	74	69.36	88.86	67.80	86.86
2	81	77.21	90.97	76.13	91.22
3	94	88.36	91.58	89.33	93.66
4	91	84.69	91.23	85.67	92.30
5	76	70.31	90.58	69.07	90.91
6	91	83.93	89.20	83.07	89.80
7	100	96.67	92.29	95.47	93.83
8	77	72.74	92.58	72.40	94.49
Total	767	720.93	90.80	714.33	91.19

2. Key Accomplishments:

Parent Conferences Oct. 6-8
Aligned SST process/RAMP Math Assessment
School Wide Family Meeting Topics
40 Book Challenge
Updated Character Reflection
Spelling Bee 3-6 Grade Students

3. Upcoming Key Events/Activities:

Spirit Day- Character Dress Up Day
Veterans Day- No School
Academic Report Cards Nov. 17

Great Valley Academy Salida

Charter School Monthly Summary Report

October 25, 2021

Attendance dates reflect 10/01-10/19

YTD Attendance 08/10-10/19

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA %
K	83	70.62	85.09	73.59	88.56
1	97	88.00	90.02	90.23	89.25
2	90	78.00	86.52	82.30	89.74
3	99	89.37	89.47	91.36	91.15
4	89	80.00	89.88	82.61	91.93
5	95	82.87	85.50	88.32	88.70
6	92	84.12	91.44	85.50	91.61
7	82	72.00	89.58	72.64	91.00
8	81	72.00	87.80	73.77	89.71
Total	811	717.000	88.40	740.32	90.19

2. Key Accomplishments:

- a. Oct. 6th – 8th: Parent/teacher conferences
- b. Oct. 11th – 15th: Fall Break
- c. Oct. 18th: Opened paved access to Lot E
- d. Oct. 18th: Opened the “Mac Track” in honor of Ms. Pam Macelhaney. (Kindergarten tricycle area)
- e. Oct. 29th: Spirit Day – Favorite Color
- f. Ongoing: Collaboration with SCOE re: math and science

3. Upcoming Key Events/Activities:

- a. Nov. 5th: Spirit Day – Crazy Hair
- b. Nov. 24th – 26th: Thanksgiving Holiday
- c. Ongoing: Collaboration with SCOE re: math and science

Great Valley Academy Homeschool

Charter School Monthly Summary Report

October 25, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	7	7.16	100	6.75	100
1	11	10.22	100	9.08	94.64
2	5	5.38	100	5.70	100
3	2	2.0	100	2.0	100
4	8	8.83	100	9.43	100
5	2	2.72	100	3.37	100
6	6	5.44	86.72	6.0	90.24
7	5	4.66	100	4.8	100
8	7	6.77	100	6.89	100
Total	53	53.22	98.45	54.08	97.89

2. Key Accomplishments:

- a. September 28th – NWEA Principals Training
- b. September 30th – Spirit Day: Family Heritage/Culture Day
- c. October 1st —Assignment Work Record (AWR) 2
- d. October 5th – Homeschool Parent Orientation
- e. October 8th—F3 Law Special Education Symposium Fall Session
- f. October 22nd – Resendiz Farms Trip

3. Upcoming Key Events/Activities:

- a. October 27th—Special Education 101 Workshop by SELPA
- b. October 28th—Spirit Day: Character Day; Staff Pumpkin Contest – Student Voted Winner
- c. November 2th—Homeschool Parent Orientation
- d. November 5th—Assignment Work Record 3 due; End of Trimester 1; Field trip to Knights Ferry for the Salmon Run
- e. November 17th—Trimester 1 Report Cards mailed home
- f. November 24-26th—Thanksgiving Break

Chief Operating Officer's Report
October 25, 2021
Board Meeting



Process and Policy Updates

- ❖ COVID Contact Tracing School Protocols – Ongoing
- ❖ Assist with Managing Student Truancies – Ongoing
- ❖ Develop Federal Funding Policies for Compliance – In Progress
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ COVID Onsite Testing Capabilities for Staff & Students – Complete

Multi-Campus Responsibilities

- ❖ Budget Revision – For Board Review
- ❖ Final 20/21 Audit Review – In Progress
- ❖ Interviewing & Hiring for Modesto Maintenance Manager – In Progress
- ❖ Training of Temporary Nurse in Salida – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Marketing Plans for 2022 Enrollment Season – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Launch of SchoolWise Parent Portal – October 2021
- ❖ Certificated Salary Schedule Analysis – Restart November 2021
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ September 2021
 - ❑ 2,572 Users Visited (88.3% New/11.7% Returning)
 - ❑ 8,208 Page Views
 - ❑ Users Averaged 1:42 Minutes on the Site
 - ❑ 56.58% Mobile – 42.95% Desktop – 0.47% Tablet
 - ❑ Type: Organic 69.60% – Direct 27.00% – Referral 2.80% – Social 0.60%

Training

- ❖ CSDC Conference – December 2021
- ❖ Governor's Budget Workshop – January 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing



Chief Executive Officer's Report
October 25, 2021
Board Meeting

State Accountability

- No data available (no testing 2020/21)

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)

Homeschool

- Onboarding and support of new principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding



Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
September 27, 2021

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Vince Jamison, Susan Nisan

Members Absent: Twila Tosh

Great Valley Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Dr. Eldon Rosenow, Tarah Heilman, Mike Ruehle, Russ Howell, Kelli Rupe

Audience Present: None

Call to Order:

Communications: **COMMUNICATIONS**

Written Communications: None

Public Participation: None

Modesto Principal Report: Mr. Ruehle spoke about the 40 Book Challenge. Students earn points and certificates for each book read. The spirit of it is that different genres are explored and the kids can feel good about their accomplishment.

Salida Principal Report: Mr. Howell showed the Morning Slides presentation. The slides give a quote of the day, character focus for each week and help with engagement and consistency in the way we dive into the GVA way and character traits.

Homeschool Principal Report: Mrs. Heilman spoke about how the Homeschool program is evolving due to legislation and COVID. Everything is an updated version or a relaunch! We are bringing back outside fieldtrips in small groups as well as spirit days once a month. Overall, Homeschool is maintaining a higher standard and keeping a pulse check on academics.

MINUTES

Regular Meeting of the Board

September 27, 2021

Page | 2

Chief Operating

Officer's Report:

Mrs. Meeks gave an update on staff testing. Unvaccinated staff will be tested on site by a third party testing service. We can also now test student's onsite with rapid testing with parent's consent.

Chief Executive

Officer's Report:

Ms. Silvestre Franklin spoke about our 2 new teachers on assignment. Kathy Harvey is the Dedicated new teacher Induction Lead. We now have 27 teachers in the program. Pati Perales is the EL Support Lead. She is "unduplicated student" support and helps teachers with being better supporters with unduplicated and struggling students.

Founder's Report:

Dr. Rosenow spoke about the changes in GVSmart. They are seeing kids 4 time per week and are seeing fast improvements.

Approval of Agenda/

Order of Agenda:

The motion was made by Mrs. Nisan, seconded by Mrs. Meraz, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mr. Jamison, seconded by Mrs. Meraz approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan

NOES: None

ABSENT: Tosh

ABSTENTIONS: None

Action Items:

ACTION ITEMS

MINUTES

Regular Meeting of the Board

September 27, 2021

P a g e | 3

Information and

Discussion:

Monthly Financials

Modesto and Salida both have healthy cash reserves.

Revised budgets are coming next month.

Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – October 25, 2021 5:30 pm

~1209 Woodrow Ave., Suite A4 Modesto CA

Adjournment:

The meeting was adjourned at 5:14 pm

ESSER III Expenditure Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

School districts, county offices of education, or charter schools, collectively known as LEAs, that receive Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan Act, referred to as ESSER III funds, are required to develop a plan for how they will use their ESSER III funds. In the plan, an LEA must explain how it intends to use its ESSER III funds to address students' academic, social, emotional, and mental health needs, as well as any opportunity gaps that existed before, and were worsened by, the COVID-19 pandemic. An LEA may also use its ESSER III funds in other ways, as detailed in the Fiscal Requirements section of the Instructions. In developing the plan, the LEA has flexibility to include community input and/or actions included in other planning documents, such as the Local Control and Accountability Plan (LCAP), provided that the input and actions are relevant to the LEA's Plan to support students.

For more information please see the Instructions.

Other LEA Plans Referenced in this Plan

Plan Title	Where the Plan May Be Accessed
GVA Modesto 2021.2022 LCAP	https://www.greatvalleyacademy.com/files/7725/file/modesto-complete-lcap-2021.2022.pdf
GVA Modesto ELOG Plan	https://www.greatvalleyacademy.com/files/8027/file/modesto-elog-20210524.pdf

Summary of Planned ESSER III Expenditures

Below is a summary of the ESSER III funds received by the LEA and how the LEA intends to expend these funds in support of students.

Total ESSER III funds received by the LEA

\$903,544

Plan Section	Total Planned ESSER III Expenditures
Strategies for Continuous and Safe In-Person Learning	\$90,000
Addressing Lost Instructional Time (a minimum of 20 percent of the LEAs ESSER III funds)	\$435,000
Use of Any Remaining Funds	\$378,544

Total ESSER III funds included in this plan

\$903,544

Community Engagement

An LEA's decisions about how to use its ESSER III funds will directly impact the students, families, and the local community. The following is a description of how the LEA meaningfully consulted with its community members in determining the prevention and mitigation strategies, strategies to address the academic impact of lost instructional time, and any other strategies or activities to be implemented by the LEA. In developing the plan, the LEA has flexibility to include input received from community members during the development of other LEA Plans, such as the LCAP, provided that the input is relevant to the development of the LEA's ESSER III Expenditure Plan.

For specific requirements, including a list of the community members that an LEA is required to consult with, please see the Community Engagement section of the Instructions.

A description of the efforts made by the LEA to meaningfully consult with its required community members and the opportunities provided by the LEA for public input in the development of the plan.

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. We continue to use these formats to communicate and solicit input on what's working, what's not working and what additional supports/resources would be most impactful.

A description of how the development of the plan was influenced by community input.

It is clear from all input over the past eighteen months that student academic, social emotional and mental health are areas of highest priority. GVA is using funding to prioritize supports and opportunities in these areas.

Actions and Expenditures to Address Student Needs

The following is the LEA's plan for using its ESSER III funds to meet students' academic, social, emotional, and mental health needs, as well as how the LEA will address the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic. In developing the plan, the LEA has the flexibility to include actions described in existing plans, including the LCAP and/or Expanded Learning Opportunity (ELO) Grant Plan, to the extent that the action(s) address the requirements of the ESSER III Expenditure Plan.

For specific requirements, please refer to the Actions and Expenditures to Address Student Needs section of the Instructions.

Strategies for Continuous and Safe In-Person Learning

A description of how the LEA will use funds to continuously and safely operate schools for in-person learning in a way that reduces or prevents the spread of the COVID-19 virus.

Total ESSER III funds being used to implement strategies for continuous and safe in-person learning

\$90,000

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
N/A	Campus Safety	PPE and HVAC maintenance	\$90,000

Addressing the Impact of Lost Instructional Time

A description of how the LEA will use funds to address the academic impact of lost instructional time.

Total ESSER III funds being used to address the academic impact of lost instructional time

\$435,000

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
ELOG plan #1	Extending instructional learning time	Summer learning program (Summer of 2023 & 2024)	\$200,000
ELOG plan #2	Accelerating learning	Enhancement of learning supports	\$235,000

Use of Any Remaining Funds

A description of the how the LEA will use any remaining ESSER III funds, as applicable.

Total ESSER III funds being used to implement additional actions

\$378,544

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
LCAP Goal #1, Action #8	Targeted supports for English learners & socioeconomically disadvantaged students	Resources in provision of targeted supports	\$50,000
LCAP Goal #2, Action #5	Provide character education (social emotional supports)	Resources in provision of supports	\$150,000
LCAP Goal #2, Action #4	Provide student access to mental health supports	Resources in provision of supports	\$58,544
N/A	Academic & social emotional supports in class	Resources in provision of supports	\$120,000

Ensuring Interventions are Addressing Student Needs

The LEA is required to ensure its interventions will respond to the academic, social, emotional, and mental health needs of all students, and particularly those students most impacted by the COVID–19 pandemic. The following is the LEA’s plan for ensuring that the actions and expenditures in the plan are addressing the identified academic, social, emotional, and mental health needs of its students, and particularly those students most impacted by the COVID–19 pandemic.

Action Title(s)	How Progress will be Monitored	Frequency of Progress Monitoring
Expanded Instructional time	Tracking of participation & pre/post assessment	Once per summer session

Action Title(s)	How Progress will be Monitored	Frequency of Progress Monitoring
Accelerated learning, targeted supports, academic/social emotional supports	Local assessments, NWEA assessments, CAASPP assessment	Depending on assessment type one to six times per year
Provide character education, student access to mental health supports	Tracking of participation, student & family surveys	Annually

ESSER III Expenditure Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy-Salida	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

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Other LEA Plans Referenced in this Plan

Plan Title	Where the Plan May Be Accessed
GVA Salida 2021.2022 LCAP	https://www.greatvalleyacademy.com/files/7726/file/salida-complete-lcap-2021.2022.pdf
GVA Salida ELOG Plan	https://www.greatvalleyacademy.com/files/8026/file/salida-elog-20210524.pdf

Summary of Planned ESSER III Expenditures

Below is a summary of the ESSER III funds received by the LEA and how the LEA intends to expend these funds in support of students.

Total ESSER III funds received by the LEA

\$569,653

Plan Section	Total Planned ESSER III Expenditures
Strategies for Continuous and Safe In-Person Learning	\$90,000
Addressing Lost Instructional Time (a minimum of 20 percent of the LEAs ESSER III funds)	\$435,000
Use of Any Remaining Funds	\$378,544

Total ESSER III funds included in this plan

\$569,653

Community Engagement

An LEA's decisions about how to use its ESSER III funds will directly impact the students, families, and the local community. The following is a description of how the LEA meaningfully consulted with its community members in determining the prevention and mitigation strategies, strategies to address the academic impact of lost instructional time, and any other strategies or activities to be implemented by the LEA. In developing the plan, the LEA has flexibility to include input received from community members during the development of other LEA Plans, such as the LCAP, provided that the input is relevant to the development of the LEA's ESSER III Expenditure Plan.

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A description of how the development of the plan was influenced by community input.

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Actions and Expenditures to Address Student Needs

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Strategies for Continuous and Safe In-Person Learning

A description of how the LEA will use funds to continuously and safely operate schools for in-person learning in a way that reduces or prevents the spread of the COVID-19 virus.

Total ESSER III funds being used to implement strategies for continuous and safe in-person learning

\$90,000

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
N/A	Campus Safety	PPE and HVAC maintenance	\$90,000

Addressing the Impact of Lost Instructional Time

A description of how the LEA will use funds to address the academic impact of lost instructional time.

Total ESSER III funds being used to address the academic impact of lost instructional time

\$300,000

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
ELOG plan #1	Extending instructional learning time	Summer learning program (Summer of 2023 & 2024)	\$200,000
ELOG plan #2	Accelerating learning	Enhancement of learning supports	\$100,000

Use of Any Remaining Funds

A description of the how the LEA will use any remaining ESSER III funds, as applicable.

Total ESSER III funds being used to implement additional actions

\$179,653

Plan Alignment (if applicable)	Action Title	Action Description	Planned ESSER III Funded Expenditures
LCAP Goal #1, Action #8	Targeted supports for English learners & socioeconomically disadvantaged students	Resources in provision of targeted supports	\$25,000
LCAP Goal #2, Action #5	Provide character education (social emotional supports)	Resources in provision of supports	\$50,000
LCAP Goal #2, Action #4	Provide student access to mental health supports	Resources in provision of supports	\$54,653
N/A	Academic & social emotional supports in class	Resources in provision of supports	\$50,000

Ensuring Interventions are Addressing Student Needs

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Action Title(s)	How Progress will be Monitored	Frequency of Progress Monitoring
Accelerated learning, targeted supports, academic/social emotional supports	Local assessments, NWEA assessments, CAASPP assessment	Depending on assessment type one to six times per year
Provide character education, student access to mental health supports	Tracking of participation, student & family surveys	Annually

Great Valley Academy Modesto
September 2021

	A Actual YTD Jul 21 - Sep 21	B Original Budget YTD Jul 21 - Sep 21	C Estimated Balance of year Oct 21-Jun 22	D Original Budget Balance of year Oct 21-Jun 22	E Original Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense						
Income						
8000 · Revenue Limit Sources	1,673,878	1,633,419	6,616,878	6,657,337	8,290,756	8,290,756
8100 · Federal Revenue	66,929	280,103	1,233,676	1,020,502	1,300,605	1,300,605
8300 · Other State Revenues	-42,816	400,432	673,559	230,311	630,743	630,743
8600 · Other Local Revenue	126,929	52,546	331,571	405,954	458,500	458,500
8700 · Selpa	98,157	87,978	364,883	375,062	463,040	463,040
Total Income	1,923,077	2,454,478	9,220,567	8,689,166	11,143,644	11,143,644
Gross Profit	1,923,077	2,454,478	9,220,567	8,689,166	11,143,644	11,143,644
Expense						
1000 · Certificated Salaries	697,564	709,405	3,208,730	3,196,888	3,906,294	3,906,294
2000 · Classified Salaries	444,379	437,507	1,786,866	1,793,738	2,231,245	2,231,245
3000 · Employee Benefits	272,487	328,719	1,432,732	1,376,500	1,705,219	1,705,219
4000 · Books & Supplies	273,230	275,033	826,900	825,098	1,100,130	1,100,130
5000 · Services & Other Operating Exp	382,072	435,034	1,358,063	1,305,102	1,740,136	1,740,136
6000 · Capital Outlay	7,700	0	70,300	78,000	78,000	78,000
7430 · All Other Financing Uses	53,015	53,015	194,364	194,364	247,379	247,379
Total Expense	2,130,448	2,238,713	8,877,955	8,769,689	11,008,402	11,008,402
Net Ordinary Income	-207,370	215,765	342,612	-80,523	135,241	135,241

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,489,548.20	5,286,354.05	5,614,181.21	P1 5,414,534.74	5,157,473.13	5,491,043.82	5,287,931.26	5,044,929.36		
LCFF Revenue	8011	0.00	0.00	834,743.00	419,797.44	419,797.44	419,797.44	419,797.44	430,096.65	430,096.65	430,096.65	430,096.65	430,096.65	0.00	4,664,416.00
EPA Funding	8012		0.00	534,335.00			428,341.00			428,341.00				0.00	1,713,364.00
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	141,706.08	141,706.08	141,706.08	141,706.08	141,706.08	151,599.12	151,599.12	151,599.12	151,599.12	151,599.12	1,771,326.00
Selpa Prop Tax	8097							70,825.00						70,825.00	141,650.00
Federal IDEA	8181													118,486.00	118,486.00
Federal Food	8220		0.00	0.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	37,711.00	75,422.00	414,821.00
Title 1, Part A	8290													117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00			162,398.26			162,398.26				257,867.48	649,593.00
State Food Revenue	8520		0.00	0.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	4,000.00	22,000.00
Educator Effectiveness	8550													0.00	0.00
Mandated Cost Reimb	8550						15,282.05							0.00	15,282.05
Lottery	8560							39,889.35			39,889.35			53,185.80	132,964.50
Lottery, prop 20	8561										0.00			21,717.54	43,435.07
In Person Inst Grant 7422	8590		0.00	0.00										128,909.00	128,909.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00										271,523.00	271,523.00
Exp Lrng Opp Grant Paras 7426	8590													0.00	0.00
Other	8590												11,629.00	0.00	11,629.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)				833.33	833.33	833.33			45,316.01	(0.00)	5,000.00
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	5,000.00				10,000.00				(59,703.10)	0.00	20,000.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	21,541.67	3,890.32	258,500.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	15,000.00	75,000.00	0.00	0.00	0.00	0.00	15,000.00	15,000.00	58,508.73	0.00	180,000.00
Selpa	8792		0.00	98,157.00	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	41,673.60	31,494.20	0.00	463,040.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	684,429.79	739,429.79	1,270,451.10	775,977.47	685,562.33	1,276,194.63	739,511.39	699,622.04	1,074,257.81	1,275,130.26	11,143,643.62
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	491,307.94	0.00	3,906,294.02
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	164,142.46	0.00	2,231,244.92
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	266,770.25	0.00	1,705,218.83
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	91,677.50	93,480.02	0.00	1,100,130.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	145,011.30	197,972.99	0.00	1,740,135.56
Capital Outlay	6000-6999	0.00	7,700.00	0.00	25,000.00	0.00	0.00	33,000.00	0.00	0.00	0.00	0.00	12,300.00	0.00	78,000.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	52,989.64	0.00	247,379.00
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	967,623.94	942,623.94	942,623.94	975,623.94	942,623.94	942,623.94	942,623.94	942,623.94	1,278,963.30		11,008,402.33
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(283,194.15)	(203,194.15)	327,827.16	(199,646.47)	(257,061.61)	333,570.69	(203,112.55)	(243,001.90)	(204,705.49)	1,275,130.26	135,241.29
Accruals Received		73,335.00		1,100,107.07	7,714.05	0.00									1,181,156.12
Liabilities		(544,380.68)	(18,745.28)												
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,489,548.20	5,286,354.05	5,614,181.21	5,414,534.74	5,157,473.13	5,491,043.82	5,287,931.26	5,044,929.36	4,840,223.88		

Great Valley Academy Salida
September 2021

	A Actual YTD	B Original Budget YTD	C Estimated Balance of year	D Original Budget Balance of year	E Original Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Sep 21	Jul 21 - Sep 21	Oct 21-Jun 22	Oct 21-Jun 22	Oct 21-Jun 22	A + C
Ordinary Income/Expense						
Income						
8000 · Revenue Limit Sources	1,477,339	1,424,326	6,168,856	6,221,869	7,646,195	7,646,195
8100 · Federal Revenue	42,197	102,385	932,257	872,069	974,454	974,454
8300 · Other State Revenues	-48,920	381,144	647,809	217,745	598,889	598,889
8600 · Other Local Revenue	42,800	44,379	284,700	283,121	327,500	327,500
8700 · SELPA	94,225	107,103	334,186	321,308	428,411	428,411
Total Income	1,607,641	2,059,337	8,367,808	7,916,112	9,975,449	9,975,449
Gross Profit	1,607,641	2,059,337	8,367,808	7,916,112	9,975,449	9,975,449
Expense						
1000 · Certificated Salaries	604,620	661,327	3,058,908	3,002,200	3,663,528	3,663,528
2000 · Classified Salaries	342,507	370,064	1,500,924	1,473,367	1,843,431	1,843,431
3000 · Employee Benefits	308,328	307,079	1,293,074	1,294,323	1,601,402	1,601,402
4000 · Books & Supplies	242,899	268,476	724,696	699,118	967,595	967,595
5000 · Services & Other Operating Exp	339,700	264,649	929,417	1,004,469	1,269,118	1,269,118
6000 · Capital Outlay	14,544	0	63,456	78,000	78,000	78,000
7430 · All Other Financing Uses	89,610	89,610	304,302	304,302	393,912	393,912
Total Expense	1,942,207	1,961,206	7,874,778	7,855,779	9,816,985	9,816,985
Net Ordinary Income	-334,566	98,131	493,030	60,333	158,464	158,464

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	4,171,898.47	4,081,876.73	4,138,114.55	4,142,372.60	4,027,280.76	4,066,394.99	4,000,186.64	3,903,685.98		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	548,477.28	548,477.28	548,477.28	548,477.28	535,407.18	535,407.18	535,407.18	535,407.18	535,407.18	0.00	6,094,192.00
EPA Funding	8012		0.00	42,546.00			41,230.00			41,230.00				39,914.00	164,920.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	100,088.64	100,088.64	100,088.64	100,088.64	100,088.64	107,823.76	107,823.76	107,823.76	107,823.76	107,823.76	1,251,108.00
Selpa Prop Tax	8097							67,987.50						67,987.50	135,975.00
Federal IDEA	8100-8299												0.00	115,665.00	115,665.00
Federal Food	8220		0.00	0.00	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	34,094.97	68,189.94	375,044.68
Title 1	8290				74,205.00									0.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			102,384.88			102,384.88				162,572.74	409,539.50
State Food Revenue	8520		0.00	0.00	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	1,727.27	3,454.55	19,000.00
Mandated Cost Reimb	8550						14,644.68						0.00	0.00	14,644.68
Lottery	8560							38,292.30			38,292.30			51,056.40	127,641.00
Lottery, prop 20	8561										0.00		41,696.06	0.00	41,696.06
In Person Instruction Grant	8590		0.00	0.00										257,817.00	257,817.00
Expanded Learning Opp Grant	8590		0.00	0.00										121,927.00	121,927.00
Other	8590												0.00	11,163.00	11,163.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	50,320.00	5,000.00
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	18,958.33	14,256.16	227,500.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	30,000.00	48,000.00	0.00	0.00	0.00	0.00	0.00	8,000.00	8,000.00	5,818.57	100,000.00
Selpa	8792	0.00	0.00	94,225.00	35,700.92	35,700.92	35,700.92	35,700.92	35,700.92	38,556.99	38,556.99	38,556.99	0.00	40,010.45	428,411.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	843,652.41	787,447.41	897,706.97	845,727.21	726,377.31	880,583.38	775,260.80	744,968.50	748,107.57	1,117,976.06	9,975,448.92
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	488,011.17	0.00	3,663,527.52
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	184,187.87	0.00	1,843,430.84
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	179,054.99	0.00	1,601,402.36
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	79,632.95	0.00	967,594.70
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	83,339.02	0.00	1,269,117.50
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	15,000.00	36,000.00	0.00	0.00	0.00	0.00	0.00	0.00	12,456.38	0.00	78,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	65,342.11	0.00	393,912.00
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	856,469.15	877,469.15	841,469.15	841,469.15	841,469.15	841,469.15	841,469.15	841,469.15	1,092,024.48		9,816,984.92
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	(12,816.74)	(90,021.74)	56,237.82	4,258.06	(115,091.85)	39,114.23	(66,208.35)	(96,500.65)	(343,916.91)	1,117,976.06	158,464.00
Accruals Received		25,326.89	55,932.54	2,082,840.92	612,554.43	0.00									2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00												
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	4,171,898.47	4,081,876.73	4,138,114.55	4,142,372.60	4,027,280.76	4,066,394.99	4,000,186.64	3,903,685.98	3,559,769.08		



**Great Valley Academy-Modesto
Educator Effectiveness Local Plan
For the 2021-2022 through 2025-2026 Fiscal Years**

Background

On July 9, 2021, Governor Newsom approved AB130, the Education Trailer Bill which provides funds to county offices of education, school districts, charter schools, and state special schools to provide professional learning.

These expenditures may take place over fiscal years 2021–22, 2022–23, 2023–24, 2024–25, and 2025–26. LEAs may use these allocated funds to provide professional learning for teachers, administrators, paraprofessionals, and classified staff that interact with pupils in order to promote educator equity, quality, and effectiveness. This funding is provided specifically to support these activities:

- ☐ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.
- ☐ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- ☐ Practices and strategies that reengage pupils and lead to accelerated learning.
- ☐ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ☐ Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a school site's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.

- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- ❑ Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- ❑ New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of AB130 section 22 subdivision (c).
- ❑ Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- ❑ Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

The funds must be spent by June 30, 2026. As a condition of receiving the funds, a spending plan for the funds must be presented at a public meeting of the governing board and then approved at a subsequent public meeting of the governing board. What follows is the proposed spending plan for the Educator Effectiveness funding that we will be receiving.

Funding

The estimated amount of one-time funds to be received for this purpose is \$251,726

Uses

- ❑ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.
- ❑ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.
- ❑ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs. Instruction and education to support implementing effective language acquisition programs for English learners.



**Great Valley Academy-Salida
Educator Effectiveness Local Plan
For the 2021-2022 through 2025-2026 Fiscal Years**

Background

On July 9, 2021, Governor Newsom approved AB130, the Education Trailer Bill which provides funds to county offices of education, school districts, charter schools, and state special schools to provide professional learning.

These expenditures may take place over fiscal years 2021–22, 2022–23, 2023–24, 2024–25, and 2025–26. LEAs may use these allocated funds to provide professional learning for teachers, administrators, paraprofessionals, and classified staff that interact with pupils in order to promote educator equity, quality, and effectiveness. This funding is provided specifically to support these activities:

- ☐ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.
- ☐ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- ☐ Practices and strategies that reengage pupils and lead to accelerated learning.
- ☐ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ☐ Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a school site's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.

- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- ❑ Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- ❑ New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of AB130 section 22 subdivision (c).
- ❑ Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- ❑ Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

The funds must be spent by June 30, 2026. As a condition of receiving the funds, a spending plan for the funds must be presented at a public meeting of the governing board and then approved at a subsequent public meeting of the governing board. What follows is the proposed spending plan for the Educator Effectiveness funding that we will be receiving.

Funding

The estimated amount of one-time funds to be received for this purpose is \$218,436

Uses

- ❑ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.
- ❑ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.
- ❑ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs. Instruction and education to support implementing effective language acquisition programs for English learners.

Regular Meeting of the Board of Trustees

Monday November 29, 2021, 5:30 pm

Great Valley Academy

1209 Woodrow Ave.

Suite A-4 Modesto, CA 95350

and

Via Zoom from

627 Matterhorn Ct.,

Marina, CA 93933

[https://us02web.zoom.us/j/89210308673?](https://us02web.zoom.us/j/89210308673?pwd=Q2gyUmNTM3h4QkdIMkpSd1h1cW9Udz09)

[pwd=Q2gyUmNTM3h4QkdIMkpSd1h1cW9Udz09](https://us02web.zoom.us/j/89210308673?pwd=Q2gyUmNTM3h4QkdIMkpSd1h1cW9Udz09)

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

c. MODESTO PRINCIPAL'S REPORT

d. SALIDA PRINCIPAL'S REPORT

e. HOMESCHOOL PRINCIPAL'S REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of October 25, 2021
- b. Approval of 1st Interim Report - Modesto
- c. Approval of 1st Interim Report - Salida

f. ACTION ITEMS

- a. Acceptance of Modesto 2020/2021 Audit
- b. Acceptance of Salida 2020/2021 Audit
- c. Approval of Educator Effectiveness Local Plan – Modesto
- d. Approval of Educator Effectiveness Local Plan – Salida
- e. Approval of Modesto Budget Revision
- f. Approval of Salida Budget Revision
- g. Approval of Updated COVID Safety Plan

g. INFORMATION AND DISCUSSION

h. FUTURE AGENDA ITEMS

- a. NEXT REGULAR BOARD MEETING – Monday January 31, 2022**

~1209 Woodrow Ave. Suite A4 Modesto, 5:30 pm

i. FINAL ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Oct. 18-Nov. 17

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	77.50	87.59	77.95	88.87
1	75	67.45	88.66	77.95	88.79
2	82	77.77	92.33	78.00	91.44
3	93	88.27	92.59	88.50	91.97
4	92	85.36	91.13	85.7	91.19
5	75	70.31	91.08	70.73	90.75
6	91	83.41	90.47	84.08	89.76
7	101	95.09	92.42	96.39	92.34
8	76	72.05	95.48	72.50	93.56
Total	770	717.23	91.32	722.47	91.00

2. Key Accomplishments:

Art and Music Clubs

40 Book Challenge (31 students have meet 40 books)

Spelling Bee

Live Broadcast of Assemblies

Teacher Evaluations

Spirit Days- Patriotic

Fire Drills

Continued Yearlong SCOE Math Trainings, RAMP Assessment Alignment/Review

Continued Yearlong SCOE Science Trainings, Grade Level Planning Sessions

Music Performances/Pumpkin Drop/ Culminating Events

3. Upcoming Key Events/Activities:

Site Safety Initiative/Multi Campus/Urban Readiness Group

Culminating Events (Rube Goldberg...Others?)

Staff Dance

Great Valley Academy Salida

Charter School Monthly Summary Report

November 29, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

*November attendance is from 11/1-11/19 **YTD attendance is 08/10-11/19

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA %
K	82	75.57	91.76	75.17	89.56
1	97	88.50	90.64	90.73	89.89
2	90	82.07	89.88	83.27	89.78
3	100	90.21	90.14	91.58	90.83
4	88	80.00	90.54	82.30	91.71
5	93	85.36	91.33	88.23	89.47
6	91	84.43	90.97	86.21	91.90
7	82	75.86	92.50	74.04	91.66
8	81	97.28	91.06	74.35	90.24
Total	804	736.28	90.94	745.86	90.55

2. Key Accomplishments:

- a. Nov. 5th: Spirit Day – Crazy Hair
- b. Nov. 18th: Campus Leadership Meeting
- c. Nov. 24th – 26th: Thanksgiving Holiday
- d. Character and academic report cards prepped
- e. Numerous Thanksgiving celebrations and activities
- f. Ongoing: Collaboration with SCOE re: math and science

3. Upcoming Key Events/Activities:

- a. Dec. 10th: CPR training
- b. Dec. 16th: Campus Leadership Meeting
- c. Dec. 17th: Spirit Day – Pajamas!
- d. Ongoing: Collaboration with SCOE re: math and science

Great Valley Academy Homeschool

Charter School Monthly Summary Report

November 29, 2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	7	7	100	6	100
1	9	9	100	9	96
2	5	5	100	5	100
3	2	2	100	2	100
4	7	7	99	8	99
5	2	2	100	2	100
6	5	5	100	5	93
7	5	4	98	4	99
8	8	7	99	7	99
Total	50	50	99	52	98

2. Key Accomplishments:

- a. November 2nd – Homeschool Parent Orientation
- b. November 5th – Assignment Work Record 3 due; End of Trimester 1; Field trip to Knights Ferry for the Salmon Run
- c. November 12th, 19th – Homeschool GVS Training with Dr. Rosenow
- d. November 16th – Homeschool Parent Orientation
- e. November 18th—Spirit Day: Sports Day
- f. November 19th – ELD Support with Patricia Perales; Site Safety Training @ Modesto

3. Upcoming Key Events/Activities:

- a. December 2nd – Final Fall Enrichment Session
- b. December 3rd-- Assignment Work Record 4 Due
- c. December 3rd, 10th, 17th -- Homeschool GVS Training with Dr. Rosenow
- d. December 7th -- Homeschool Parent Orientation
- e. December 15th—Winter Reception
- f. December 20th-31st – Winter Break
- g. January 3rd—Teacher In-Service

Chief Operating Officer's Report
November 29, 2021
Board Meeting



Process and Policy Updates

- ❖ Implementation of SPOT COVID Contact Tracing for School Protocols – In Progress
- ❖ Develop Federal Funding Policies for Compliance – In Progress
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ Budget Revision – For Board Review
- ❖ Final 20/21 Audit Review – For Board Review
- ❖ Interviewing & Hiring for Modesto Maintenance Manager – Complete
- ❖ Training of Temporary Nurse in Salida – Complete
- ❖ Federal Funding Tracking – In Progress
- ❖ Marketing Collateral for 2022 Enrollment Season – In Progress
- ❖ GVA Marketing Focus Group Process – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Launch of SchoolWise Parent Portal – December 2021
- ❖ Certificated Salary Schedule Analysis – Restart January 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ October 2021
 - ❑ 2,533 Users Visited (89.4% New/10.6% Returning)
 - ❑ 7,705 Page Views
 - ❑ Users Averaged 1:36 Minutes on the Site
 - ❑ 51.93% Mobile – 47.08% Desktop – 0.99% Tablet
 - ❑ Type: Organic 62.80% – Direct 33.50% – Referral 2.40% – Social 1.30%

Training

- ❖ CSDC Conference – December 2021
- ❖ Governor's Budget Workshop – January 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing



Chief Executive Officer's Report
November 29, 2021
Board Meeting

State Accountability

- No data available (no testing 2020/21)

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program
 - Intentional outreach to prior families
 - Marketing collateral, delivered to area preschools



Homeschool

- Onboarding and support of new principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021



November 29, 2021

Founders Report to the Great Valley Academy School Board

This has been a busy month. Younger students are dealing with development delays and older students are having trouble developing the grit that was prevalent in the pre COVID days.

The two GVS teams have adjusted well and Naomi Stewart and I continue to alternate between the campuses on opposing schedules. With the 6 week rotations that match other interventions and seeing students 4 days per week has helped with GVS program completion rates.

Staff training has become an ongoing opportunity with the three new staff people. I feel the changes in the GVS program have been very beneficial for our GVA students.

Sincerely,
Eldon Rosenow, Founder

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
October 25, 2021

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Twila Tosh, Susan Nisan

Members Absent: Vince Jamison

Great Valley Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Kelli Rupe, Michael Ruehle, Russ Howell, Tarah Heilman

Audience Present: Several staff as well as parents were present. Refer to sign in sheet for names.

**Call to Order/
Pledge of Allegiance:** Mr. Payne welcomed everyone and led the Pledge of Allegiance.

Communications: **COMMUNICATIONS**

Written Communications: Mr. Payne read a letter regarding mandated vaccinations signed by several staff and parents.

Public Participation: Several parents and GVA staff spoke about the mandated vaccinations and Mr. Payne answered questions. Public participation ended at 6:30 pm.

Modesto Principal Report: Mr. Ruehle spoke about the Spelling Bee competitions. Stanislaus County is reinstating some competitions. Students in grades 4-6 will be represented. We have 2 students moving on to the count level Spelling Bee this year.

Salida Principal Report: Mr. Howell spoke about the new paved road and how much it assisted in drop off and pick up just in time for the rain and mud! He also reported on the new Mac Track that opened on October 18th in honor of Mrs. Mac.

MINUTES

Regular Meeting of the Board

October 25, 2021

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Homeschool Principal

Report:

Mrs. Heilman reported that there is ongoing SPED and 1 on 1 training with SELPA. Teachers and students are responding well and students are learning, reading and moving forward!

Chief Operating

Officer's Report:

Mrs. Meeks reported that the auditors were here and finishing up the audit. Everything is looking good. There is an infrastructure in place that makes it easy.

Chief Executive

Officer's Report:

Ms. Silvestre Franklin updated the Board on weekly COVID testing for staff. Testing is Tuesdays in Salida and Wednesdays in Modesto. There are about 100 people tested every week. Student testing is also going very well. We have had no positive cases at those testings. Thank you to Marisa for making it happen!

Founder's Report:

No report

Approval of Agenda/

Order of Agenda:

The motion was made by Ms. Tosh, seconded by Mrs. Meraz, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mrs. Nisan, seconded by Mr. Payne approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

October 25, 2021

Page | 3

Action Items:

ACTION ITEMS

a. The motion was made by Mrs. Meraz, seconded by Ms. Tosh approving the Modesto ESSER Plan. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

b. The motion was made by Mrs. Nisan, seconded by Mr. Payne approving the Salida ESSER Plan. A roll call vote was taken.

AYES: Payne, Meraz, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

Information and

Discussion:

Monthly Financials

There will be a revised budget presented to the Board at next month's meeting.

Educator Effectiveness plans

Ms. Silvestre Franklin gave an update on EEP money. The new plan will be voted on at next month's Board Meeting.

Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Monday November 29, 2021- 5:30 pm
~1509 Woodrow Ave. Suite A4 Modesto

Adjournment:

The meeting was adjourned at 6:51 pm

Great Valley Academy-Modesto Campus
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED & RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	8,290,756	8,290,756	2,144,655	8,290,756
2) Federal Revenue	8100-8299	1,300,605	1,300,605	149,721	1,300,605
3) Other State Revenue	8300-8599	630,743	630,743	20,546	630,743
4) Other Local Revenue	8600-8799	921,540	921,540	311,492	921,540
5) TOTAL REVENUES		11,143,644	11,143,644	2,626,414	11,143,644
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,906,294	3,906,294	1,012,949	3,906,294
2) Classified Salaries	2000-2999	2,231,245	2,231,245	627,099	2,231,245
3) Employee Benefits	3000-3999	1,705,219	1,705,219	406,184	1,705,219
4) Books and Supplies	4000-4999	1,100,130	1,100,130	351,999	1,100,130
5) Services & Other Operating Exp	5000-5999	1,740,136	1,740,136	434,577	1,740,136
6) Capital Outlay	6000-6999	78,000	78,000	17,335	78,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	247,379 0	247,379 0	70,687 0	247,379 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		11,008,403	11,008,403	2,920,830	11,008,403
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)		135,241	135,241	(294,416)	135,241
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses					
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	0	0	0	0
4) TOTAL, OTHER FINANCING SOURCES/USES		0	0	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		135,241	135,241	(294,416)	135,241
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	8,649,664	8,649,664		8,649,664
b) Audit Adjustments	9793	1,600	1,600		1,600
c) As of July 1, Audited (F1a + F1b)		8,651,264	8,651,264		8,651,264
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		8,651,264	8,651,264		8,651,264
2) Ending Balance, June 30 (E + F1e)		8,786,505	8,786,505		8,786,505

Great Valley Academy-Modesto Campus
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	8,149,106	8,149,106	2,144,655	8,149,106
2) Federal Revenue	8100-8299	0	0	0	0
3) Other State Revenue	8300-8599	153,247	153,247	(1,939)	153,247
4) Other Local Revenue	8600-8799	458,500	458,500	166,840	458,500
5) TOTAL REVENUES		8,760,853	8,760,853	2,309,556	8,760,853
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,183,935	3,183,935	899,973	3,183,935
2) Classified Salaries	2000-2999	1,571,767	1,571,767	534,185	1,571,767
3) Employee Benefits	3000-3999	1,490,853	1,490,853	357,157	1,490,853
4) Books and Supplies	4000-4999	251,444	251,444	103,421	251,444
5) Services & Other Operating Exp	5000-5999	687,994	687,994	253,999	687,994
6) Capital Outlay	6000-6999	78,000	78,000	17,335	78,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	212,052 0	212,052 0	70,687 0	212,052 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		7,476,045	7,476,045	2,236,757	7,476,045
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		1,284,808	1,284,808	72,799	1,284,808
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	(1,382,605)	(1,382,605)	0	(1,382,605)
4) TOTAL, OTHER FINANCING SOURCES/USES		(1,382,605)	(1,382,605)	0	(1,382,605)
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		(97,797)	(97,797)	72,799	(97,797)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	8,370,451	8,370,451		8,370,451
b) Audit Adjustments	9793	1,600	1,600		1,600
c) As of July 1, Audited (F1a + F1b)		8,372,051	8,372,051		8,372,051
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		8,372,051	8,372,051		8,372,051
2) Ending Balance, June 30 (E + F1e)		8,274,254	8,274,254		8,274,254

Great Valley Academy-Modesto Campus
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	141,650	141,650	0	141,650
2) Federal Revenue	8100-8299	1,300,605	1,300,605	149,721	1,300,605
3) Other State Revenue	8300-8599	477,496	477,496	22,485	477,496
4) Other Local Revenue	8600-8799	463,040	463,040	144,652	463,040
5) TOTAL REVENUES		2,382,791	2,382,791	316,858	2,382,791
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	722,359	722,359	112,976	722,359
2) Classified Salaries	2000-2999	659,478	659,478	92,914	659,478
3) Employee Benefits	3000-3999	214,366	214,366	49,027	214,366
4) Books and Supplies	4000-4999	848,686	848,686	248,578	848,686
5) Services & Other Operating Exp	5000-5999	1,052,142	1,052,142	180,578	1,052,142
6) Capital Outlay	6000-6999	0	0	0	0
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	35,327 0	35,327 0	0 0	35,327 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		3,532,358	3,532,358	684,073	3,532,358
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		(1,149,567)	(1,149,567)	(367,215)	(1,149,567)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	1,382,605	1,382,605	0	1,382,605
4) TOTAL, OTHER FINANCING SOURCES/USES		1,382,605	1,382,605	0	1,382,605
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		233,038	233,038	(367,215)	233,038
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	279,213	279,213		279,213
b) Audit Adjustments	9793	0	0		0
c) As of July 1, Audited (F1a + F1b)		279,213	279,213		279,213
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		279,213	279,213		279,213
2) Ending Balance, June 30 (E + F1e)		512,251	512,251		512,251

FISCAL YEAR 2021-2024

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GENERAL FUND FINANCIAL PROJECTIONS

Great Valley AcademyModesto

		FISCAL YEAR 2021-2022				FISCAL YEAR 2022-23				FISCAL YEAR 2023-24			
		SOURCE FOR PROJECTION				BUDGET				PROJECTION			
Description	Account Codes	Projection Factors	Unrestr. 21-22 1st Yr. Proj.	Restr 21-22 1st Yr. Proj.	Total 21-22 1st Yr. Proj.	Projection Factors	Unrestr. 22-23 2nd Yr. Proj.	Restr 22-23 2nd Yr. Proj.	Total 22-23 2nd Yr. Proj.	Projection Factors	Unrestr. 23-24 3rd Yr. Proj.	Restr 23-24 3rd Yr. Proj.	Total 23-24 3rd Yr. Proj.
Fund Balance-July 1 Estimated			\$8,370,451	\$279,213	\$8,649,664		\$8,274,254	\$512,251	\$8,786,505		\$8,822,519	\$67,693	\$8,890,212
Unaudited Actual Adjustments			\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
July 1 Unaudited	9791		\$8,370,451	\$279,213	\$8,649,664		\$8,274,254	\$512,251	\$8,786,505		\$8,822,519	\$67,693	\$8,890,212
Audit Adjustments	9793		\$1,600	\$0	\$1,600		\$0	\$0	\$0		\$0	\$0	\$0
Adjustment for Restatements	9795		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Net Beginning Balance			\$8,372,051	\$279,213	\$8,651,264		\$8,274,254	\$512,251	\$8,786,505		\$8,822,519	\$67,693	\$8,890,212
Revenue Limit Sources	8010-8099	see notes	\$8,149,106	\$141,650	\$8,290,756	see notes	\$8,535,992	\$140,000	\$8,675,992	see notes	\$8,903,866	\$14,000	\$8,917,866
Federal Revenues	8100-8299	see notes	\$0	\$1,300,605	\$1,300,605	see notes	\$0	\$987,298	\$987,298	see notes	\$0	\$337,705	\$337,705
Other State Revenues	8300-8599	see notes	\$153,247	\$477,496	\$630,743	see notes	\$152,473	\$67,805	\$220,278	see notes	\$156,791	\$68,923	\$225,714
Other Local Revenues	8600-8799	see notes	\$458,500	\$463,040	\$921,540	see notes	\$494,255	\$450,000	\$944,255	see notes	\$494,255	\$450,000	\$944,255
Total Operating Revenues			\$8,760,853	\$2,382,791	\$11,143,644		\$9,182,720	\$1,645,103	\$10,827,823		\$9,554,912	\$870,628	\$10,425,540
Certificated Salaries	1000-1999	see notes	\$3,183,935	\$722,359	\$3,906,294	see notes	\$3,223,444	\$766,939	\$3,990,383	see notes	\$3,416,344	\$328,946	\$3,745,290
Classified Salaries	2000-2999	see notes	\$1,571,767	\$659,478	\$2,231,245	see notes	\$1,601,767	\$659,315	\$2,261,082	see notes	\$1,947,313	\$217,791	\$2,165,104
Employee Benefits	3000-3999	see notes	\$1,490,853	\$214,366	\$1,705,219	see notes	\$1,575,254	\$279,443	\$1,854,697	see notes	\$1,746,403	\$160,967	\$1,907,370
Books and Supplies	4000-4999	see notes	\$251,444	\$848,686	\$1,100,130	see notes	\$260,488	\$508,062	\$768,550	see notes	\$500,550	\$262,000	\$762,550
Services, Other Operating	5000-5999	see notes	\$687,994	\$1,052,142	\$1,740,136	see notes	\$723,249	\$743,603	\$1,466,852	see notes	\$744,780	\$599,491	\$1,344,271
Capital Outlay	6000-6999	see notes	\$78,000	\$0	\$78,000	see notes	\$55,500	\$0	\$55,500	see notes	\$55,500	\$0	\$55,500
Other Outgo	7100-7299 7400-7499	see notes	\$212,052	\$35,327	\$247,379	see notes	\$212,052	\$115,000	\$327,052	see notes	\$223,690	\$118,362	\$342,052
Direct Support/Indirect Costs	7300-7399		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Total Operating Expenditures			\$7,476,045	\$3,532,358	\$11,008,403		\$7,651,754	\$3,072,362	\$10,724,116		\$8,634,580	\$1,687,557	\$10,322,137
Operating Excess (Deficit)			\$1,284,808	(\$1,149,567)	\$135,241		\$1,530,966	(\$1,427,259)	\$103,707		\$920,332	(\$816,929)	\$103,403
Transfers In	8910-8929		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Transfers Out	7600-7629		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Sources	8930-8979		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Uses	7630-7699		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Long Term Liability	9660-9669		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Contrib. to Restricted Program	8980-8999		(\$1,382,605)	\$1,382,605	\$0		(\$982,701)	\$982,701	\$0		(\$749,236)	\$749,236	\$0
Net Increase (Decrease) to Fund Balance			(\$97,797)	\$233,038	\$135,241		\$548,265	(\$444,558)	\$103,707		\$171,096	(\$67,693)	\$103,403
Ending Fund Balance			\$8,274,254	\$512,251	\$8,786,505		\$8,822,519	\$67,693	\$8,890,212		\$8,993,615	\$0	\$8,993,615
Recommended Reserve (Unr)	3.00%				\$262,826				\$275,482				\$286,647
Reserve					\$8,786,505				\$8,890,212				\$8,993,615
Reserve %					79.82%				82.90%				87.13%

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2021-2022

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 879.7 ADA and 34.4% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 886.43 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising returns to 2019/20 experience

EXPENDITURES:

- 1000-1999** Salaries based on 2020/21 plus 3% increase
- 2000-2999** Salaries based on 2020/21 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses with SpED expense increase
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections and Federal Food Program, ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 886.43 ADA @ \$49 and State Food Program and IPI/ELO Funds
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections

EXPENDITURES:

- 1000-1999** Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2022-2023

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 902.5 ADA and 36.8% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 879.80 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2021/22 plus 3% increase
- 2000-2999** Salaries based on 2021/22 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase and ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 879.80 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2023-2024

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 902.5 ADA and 36.8% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 902.5 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses - Reduction of LLMF expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase
- 8300-8599** Revenue assumes Restricted Lottery based on 902.5 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees - Reduction of LLMF expenses
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

Great Valley Academy-Salida
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance
UNRESTRICTED & RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	7,646,195	7,646,195	2,100,026	7,646,195
2) Federal Revenue	8100-8299	974,454	974,454	116,124	974,454
3) Other State Revenue	8300-8599	598,889	598,889	4,389	598,889
4) Other Local Revenue	8600-8799	755,911	755,911	196,275	755,911
5) TOTAL REVENUES		9,975,449	9,975,449	2,416,814	9,975,449
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,663,528	3,663,528	933,637	3,663,528
2) Classified Salaries	2000-2999	1,843,431	1,843,431	497,951	1,843,431
3) Employee Benefits	3000-3999	1,601,402	1,601,402	390,694	1,601,402
4) Books and Supplies	4000-4999	967,595	967,595	314,833	967,595
5) Services & Other Operating Exp	5000-5999	1,269,117	1,269,117	414,458	1,269,117
6) Capital Outlay	6000-6999	78,000	78,000	14,544	78,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299	393,912	393,912	119,480	393,912
	7400-7499	0	0	0	0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		9,816,985	9,816,985	2,685,597	9,816,985
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)		158,464	158,464	(268,783)	158,464
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses					
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	0	0	0	0
4) TOTAL, OTHER FINANCING SOURCES/USES		0	0	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		158,464	158,464	(268,783)	158,464
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	7,242,283	7,242,283		7,242,283
b) Audit Adjustments	9793	51,170	51,170		51,170
c) As of July 1, Audited (F1a + F1b)		7,293,453	7,293,453		7,293,453
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		7,293,453	7,293,453		7,293,453
2) Ending Balance, June 30 (E + F1e)		7,451,917	7,451,917		7,451,917

Great Valley Academy-Salida
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	7,510,220	7,510,220	2,100,026	7,510,220
2) Federal Revenue	8100-8299	0	0	0	0
3) Other State Revenue	8300-8599	158,449	158,449	(1,831)	158,449
4) Other Local Revenue	8600-8799	327,500	327,500	57,417	327,500
5) TOTAL REVENUES		7,996,169	7,996,169	2,155,612	7,996,169
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,045,186	3,045,186	847,934	3,045,186
2) Classified Salaries	2000-2999	1,490,181	1,490,181	453,242	1,490,181
3) Employee Benefits	3000-3999	1,381,448	1,381,448	365,227	1,381,448
4) Books and Supplies	4000-4999	366,543	366,543	82,597	366,543
5) Services & Other Operating Exp	5000-5999	506,895	506,895	202,313	506,895
6) Capital Outlay	6000-6999	78,000	78,000	14,544	78,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	360,000 0	360,000 0	119,480 0	360,000 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		7,228,253	7,228,253	2,085,337	7,228,253
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		767,916	767,916	70,275	767,916
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	(901,263)	(901,263)	0	(901,263)
4) TOTAL, OTHER FINANCING SOURCES/USES		(901,263)	(901,263)	0	(901,263)
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		(133,347)	(133,347)	70,275	(133,347)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	6,997,641	6,997,641		6,997,641
b) Audit Adjustments	9793	51,170	51,170		51,170
c) As of July 1, Audited (F1a + F1b)		7,048,811	7,048,811		7,048,811
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		7,048,811	7,048,811		7,048,811
2) Ending Balance, June 30 (E + F1e)		6,915,464	6,915,464		6,915,464

Great Valley Academy-Salida
2021-2022 First Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	135,975	135,975	0	135,975
2) Federal Revenue	8100-8299	974,454	974,454	116,124	974,454
3) Other State Revenue	8300-8599	440,440	440,440	6,220	440,440
4) Other Local Revenue	8600-8799	428,411	428,411	138,858	428,411
5) TOTAL REVENUES		1,979,280	1,979,280	261,202	1,979,280
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	618,342	618,342	85,703	618,342
2) Classified Salaries	2000-2999	353,250	353,250	44,709	353,250
3) Employee Benefits	3000-3999	219,954	219,954	25,467	219,954
4) Books and Supplies	4000-4999	601,052	601,052	232,236	601,052
5) Services & Other Operating Exp	5000-5999	762,222	762,222	212,145	762,222
6) Capital Outlay	6000-6999	0	0	0	0
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299	33,912	33,912	0	33,912
	7400-7499	0	0	0	0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		2,588,732	2,588,732	600,260	2,588,732
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		(609,452)	(609,452)	(339,058)	(609,452)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	901,263	901,263	0	901,263
4) TOTAL, OTHER FINANCING SOURCES/USES		901,263	901,263	0	901,263
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		291,811	291,811	(339,058)	291,811
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	244,642	244,642		244,642
b) Audit Adjustments	9793	0	0		0
c) As of July 1, Audited (F1a + F1b)		244,642	244,642		244,642
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		244,642	244,642		244,642
2) Ending Balance, June 30 (E + F1e)		536,453	536,453		536,453

FISCAL YEAR 2021-2024

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GENERAL FUND FINANCIAL PROJECTIONS

Great Valley AcademySalida

		FISCAL YEAR 2021-22				FISCAL YEAR 2022-23				FISCAL YEAR 2023-24			
		ESTIMATED		SOURCE FOR PROJECTION		BUDGET		SOURCE FOR PROJECTION		PROJECTION		SOURCE FOR PROJECTION	
Description	Account Codes	Projection Factors	Unrestr. 21-22 1st Yr. Proj.	Restr 21-22 1st Yr. Proj.	Total 21-22 1st Yr. Proj.	Projection Factors	Unrestr. 22-23 2nd Yr. Proj.	Restr 22-23 2nd Yr. Proj.	Total 22-23 2nd Yr. Proj.	Projection Factors	Unrestr. 23-24 3rd Yr. Proj.	Restr 23-24 3rd Yr. Proj.	Total 23-24 3rd Yr. Proj.
Fund Balance-July 1 Estimated			\$6,997,641	\$244,642	\$7,242,283		\$6,915,464	\$536,453	\$7,451,917		\$7,576,745	\$77,934	\$7,654,679
Unaudited Actual Adjustments			\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
July 1 Unaudited	9791		\$6,997,641	\$244,642	\$7,242,283		\$6,915,464	\$536,453	\$7,451,917		\$7,576,745	\$77,934	\$7,654,679
Audit Adjustments	9793		\$51,170	\$0	\$51,170		\$0	\$0	\$0		\$0	\$0	\$0
Adjustment for Restatements	9795		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Net Beginning Balance			\$7,048,811	\$244,642	\$7,293,453		\$6,915,464	\$536,453	\$7,451,917		\$7,576,745	\$77,934	\$7,654,679
Revenue Limit Sources	8010-8099	see notes	\$7,510,220	\$135,975	\$7,646,195	see notes	\$7,961,999	\$135,000	\$8,096,999	see notes	\$8,204,134	\$135,000	\$8,339,134
Federal Revenues	8100-8299	see notes	\$0	\$974,454	\$974,454	see notes	\$0	\$663,745	\$663,745	see notes	\$0	\$254,205	\$254,205
Other State Revenues	8300-8599	see notes	\$158,449	\$440,440	\$598,889	see notes	\$143,236	\$59,405	\$202,641	see notes	\$167,802	\$41,895	\$209,697
Other Local Revenues	8600-8799	see notes	\$327,500	\$428,411	\$755,911	see notes	\$374,325	\$415,000	\$789,325	see notes	\$371,750	\$415,000	\$786,750
Total Operating Revenues			\$7,996,169	\$1,979,280	\$9,975,449		\$8,479,560	\$1,273,150	\$9,752,710		\$8,743,686	\$846,100	\$9,589,786
Certificated Salaries	1000-1999	see notes	\$3,045,186	\$618,342	\$3,663,528	see notes	\$3,106,090	\$661,343	\$3,767,433	see notes	\$3,488,729	\$150,053	\$3,638,782
Classified Salaries	2000-2999	see notes	\$1,490,181	\$353,250	\$1,843,431	see notes	\$1,519,985	\$361,949	\$1,881,934	see notes	\$1,704,221	\$124,151	\$1,828,372
Employee Benefits	3000-3999	see notes	\$1,381,448	\$219,954	\$1,601,402	see notes	\$1,495,349	\$252,167	\$1,747,516	see notes	\$1,720,655	\$75,513	\$1,796,168
Books and Supplies	4000-4999	see notes	\$366,543	\$601,052	\$967,595	see notes	\$435,431	\$176,819	\$612,250	see notes	\$396,731	\$200,519	\$597,250
Services, Other Operating	5000-5999	see notes	\$506,895	\$762,222	\$1,269,117	see notes	\$744,965	\$312,850	\$1,057,815	see notes	\$496,959	\$547,054	\$1,044,013
Capital Outlay	6000-6999	see notes	\$78,000	\$0	\$78,000	see notes	\$88,000	\$0	\$88,000	see notes	\$88,000	\$0	\$88,000
Other Outgo	7100-7299 7400-7499	see notes	\$360,000	\$33,912	\$393,912	see notes	\$360,000	\$35,000	\$395,000	see notes	\$375,000	\$35,000	\$410,000
Direct Support/Indirect Costs	7300-7399		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Total Operating Expenditures			\$7,228,253	\$2,588,732	\$9,816,985		\$7,749,820	\$1,800,128	\$9,549,948		\$8,270,295	\$1,132,290	\$9,402,585
Operating Excess (Deficit)			\$767,916	(\$609,452)	\$158,464		\$729,740	(\$526,978)	\$202,762		\$473,391	(\$286,190)	\$187,201
Transfers In	8910-8929		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Transfers Out	7600-7629		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Sources	8930-8979		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Uses	7630-7699		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Long Term Liability	9660-9669		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Contrib. to Restricted Program	8980-8999		(\$901,263)	\$901,263	\$0		(\$68,459)	\$68,459	\$0		(\$157,086)	\$157,086	\$0
Net Increase (Decrease) to Fund Balance			(\$133,347)	\$291,811	\$158,464		\$661,281	(\$458,519)	\$202,762		\$316,305	(\$129,104)	\$187,201
Ending Fund Balance			\$6,915,464	\$536,453	\$7,451,917		\$7,576,745	\$77,934	\$7,654,679		\$7,893,050	(\$51,170)	\$7,841,880
Recommended Reserve (Unr)	3.00%		\$239,885				\$254,387				\$262,311		
Reserve			\$7,451,917				\$7,654,679				\$7,841,880		
Reserve %			75.91%				80.15%				83.40%		

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2021-2022

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 824.6 ADA and 24.7% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 850.94 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising returns to 2019/20 experience

EXPENDITURES:

- 1000-1999** Salaries based on 2020/21 plus 3% increase
- 2000-2999** Salaries based on 2020/21 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses with SpED expense increase
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections and Federal Food Program, ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 850.94 ADA @ \$49 and State Food Program and IPI/ELO Funds
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections

EXPENDITURES:

- 1000-1999** Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2022-2023

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 855 ADA and 32.1% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 824.6 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2021/22 plus 3% increase
- 2000-2999** Salaries based on 2021/22 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase and ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 824.6 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2023-2024

UNRESTRICTED

REVENUES:

- 8010-8099** 22.1b version LCFF revenue is based on 855 ADA and 32.1% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 855 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses - Reduction of LLMF expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase
- 8300-8599** Revenue assumes Restricted Lottery based on 855 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees - Reduction of LLMF expenses
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

**GREAT VALLEY ACADEMY
MODESTO, CALIFORNIA**

Charter No. 0985

**FINANCIAL STATEMENTS AND
INDEPENDENT AUDITORS' REPORT**

**For the Fiscal Year Ended
June 30, 2021**

NIGRO & NIGRO^{PC}

GREAT VALLEY ACADEMY - MODESTO

For the Fiscal Year Ended June 30, 2021

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Financial Section



INDEPENDENT AUDITORS' REPORT

Board of Directors
Great Valley Academy - Modesto
Modesto, California

Report on the Financial Statements

We have audited the accompanying financial statements of Great Valley Academy - Modesto (a California nonprofit Organization), which comprise the statement of financial position as of June 30, 2021, and the related statements of activities, cash flows, and functional expenses for the fiscal year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

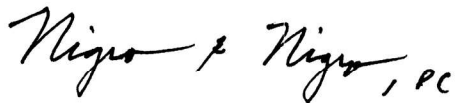
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Great Valley Academy - Modesto as of June 30, 2021, and the changes in its net assets and its cash flows for the fiscal year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters*Other Information*

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The supplementary information is presented for purposes of additional analysis and is not a required part of the financial statements. The supplementary information on pages 20 and 21 is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. Such information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole. The information on page 19 has not been subjected to the auditing procedures applied in the audit of the financial statements and accordingly, we do not express an opinion or provide any assurance on it.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated November 17, 2021, on our consideration of the Great Valley Academy - Modesto's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

A handwritten signature in black ink that reads "Nigro & Nigro, PC". The signature is written in a cursive, flowing style.

Murrieta, California
November 17, 2021

GREAT VALLEY ACADEMY - MODESTO*Statement of Financial Position**June 30, 2021*

ASSETS

Current Assets:

Cash	\$	4,329,175
Accounts receivable (Note 4)		954,010
Intercompany receivable (Note 5)		1,909
Inventory		64,623
Other current assets		95,038
Total current assets		<u>5,444,755</u>

Non-current Assets:

Investments (Note 3)		1,032,907
Property and equipment (Note 6)		
Non-depreciable assets		1,120,000
Depreciable assets		5,059,151
Less accumulated depreciation		<u>(1,857,930)</u>
Total property and equipment, net:		<u>4,321,221</u>
Total noncurrent assets:		<u>5,354,128</u>

Total Assets	\$	<u>10,798,883</u>
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LIABILITIES AND NET ASSETS**Liabilities**

Current Liabilities:

Accounts payable	\$	212,143
Accrued payroll liabilities and benefits		162,750
Intercompany payable (Note 7)		58,607
Unearned revenues		52,366
Net deferred pay (See Note 8)		263,411
Mortgage payable, current portion (Note 9)		<u>145,184</u>
Total current liabilities		894,461

Non-current liabilities:

Mortgage payable (Note 9)		<u>1,253,158</u>
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Total liabilities		<u>2,147,619</u>
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Net assets

Without donor restrictions		8,372,051
With donor restrictions (Note 10)		<u>279,213</u>
Total net assets		<u>8,651,264</u>

Total Liabilities and Net Assets	\$	<u>10,798,883</u>
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GREAT VALLEY ACADEMY - MODESTO*Statement of Activities**For the Fiscal Year Ended June 30, 2021*

	Without Donor Restrictions	With Donor Restrictions	Total
REVENUES AND OTHER SUPPORT			
LCFF apportionment	\$ 3,245,985	\$ -	\$ 3,245,985
Education Protection Account	2,887,386	-	2,887,386
In-lieu property tax transfers	1,693,330	-	1,693,330
Special education property tax transfers	-	141,021	141,021
Federal grants	-	552,852	552,852
Federal special education awards	-	139,866	139,866
Federal food program	-	377,918	377,918
State food program	-	79,758	79,758
Lottery	155,742	66,804	222,546
Other state sources	11,195	490,074	501,269
STRS on-behalf contribution	87,576	-	87,576
Local special education transfers	-	437,594	437,594
Other local revenues	110,968	15,514	126,482
Net assets released from restrictions	2,134,240	(2,134,240)	-
Total revenue and other support	10,326,422	167,161	10,493,583
EXPENSES:			
Program services:			
Instruction	5,774,603	-	5,774,603
Instruction-related services	1,048,507	-	1,048,507
Pupil services	862,882	-	862,882
Ancillary services	265,132	-	265,132
Depreciation	271,131	-	271,131
Total program services	8,222,255	-	8,222,255
Management and general:			
General administration	999,620	-	999,620
Plant services	545,757	-	545,757
Depreciation	2,637	-	2,637
Interest expense	65,076	-	65,076
Total management and general	1,613,090	-	1,613,090
Total expenses	9,835,345	-	9,835,345
Change in net assets from operations	491,077	167,161	658,238
OTHER GAINS/(LOSSES):			
Investment Income (Note 3)	6,940	-	6,940
Change in net assets	498,017	167,161	665,178
NET ASSETS:			
Beginning of year	7,874,034	112,052	7,986,086
End of year	\$ 8,372,051	\$ 279,213	\$ 8,651,264

See accompanying notes and auditors' report.

GREAT VALLEY ACADEMY - MODESTO*Statement of Cash Flows**For the Fiscal Year Ended June 30, 2021*

CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	\$	665,178
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities:		
Depreciation expense		273,768
(Increase) decrease in operating assets:		
Accounts receivable		695,106
Intercompany receivable		22,001
Inventory		(28,856)
Other current assets		(66,210)
Increase (decrease) in operating liabilities:		
Accounts payable		(479,916)
Accrued payroll liabilities		22,824
Intercompany payable		58,607
Unearned revenue		46,302
Net deferred pay		(3,411)
Net cash provided (used) by operating activities		<u>1,205,393</u>

CASH FLOWS FROM INVESTING ACTIVITIES

Purchase of equipment, furniture and building improvements		(54,200)
Acquisition of investments		<u>246,662</u>
Net cash provided (used) by investing activities		<u>192,462</u>

CASH FLOWS FROM FINANCING ACTIVITIES

Payment on mortgage note		<u>(138,091)</u>
Net increase (decrease) in cash		1,259,764
Cash:		
Beginning of year		<u>3,069,411</u>
End of year	\$	<u><u>4,329,175</u></u>

SUIPPLEMENTAL DISCLOSURE

Interest paid	\$	<u><u>65,076</u></u>
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GREAT VALLEY ACADEMY - MODESTO*Statement of Functional Expenses**For the Fiscal Year Ended June 30, 2021*

	Program Services	Management and General	Total
Salaries and Benefits			
Certificated salaries	\$ 3,635,347	\$ -	\$ 3,635,347
Classified salaries	1,255,452	680,046	1,935,498
Employee benefits	1,355,775	178,987	1,534,762
Total Salaries and Benefits	6,246,574	859,033	7,105,607
Supplies and Operating Expenses			
Books and supplies	1,105,481	112,667	1,218,148
Services and other operating expenses	599,069	573,677	1,172,746
Allocated depreciation	271,131	2,637	273,768
Other outgo	-	65,076	65,076
Total Supplies and Operating Expenses	1,975,681	754,057	2,729,738
Totals	\$ 8,222,255	\$ 1,613,090	\$ 9,835,345

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. Nature of Activities

In February 2008, Great Valley Academy - Modesto (the “School”) was approved to operate as a California charter school by the Stanislaus County Office of Education. The School was formed as an Internal Revenue Code (IRC) Section 501(c)(3) non-profit public benefit corporation. The School offers classroom and non-classroom-based education programs, offering education to students in kindergarten and grades 1-8. The school began its operations in 2008-09. In addition, the School also offers consulting services to other educational institutions, which are considered unrelated to the primary educational activity. Major sources of revenue for education comes from federal and state agencies.

B. Basis of Presentation and Accounting

The School accounts for its financial transactions in accordance with the policies and procedures of the Department of Education’s *California School Accounting Manual*.

The financial statements of the School have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America. The financial statements are presented in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958 dated August 2016, and the provisions of the American Institute of Certified Public Accountants (AICPA) “Audit and Accounting Guide for Not-for-Profit Organizations” (the “Guide”). ASC 958-205 was effective January 1, 2018 and addresses general-purpose external financial statements appropriate for not-for-profit organizations.

Under the provisions of the ASC 958-205, net assets and revenues, and gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the School and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the School. The School’s board may designate assets without restrictions for specific operational purposes from time to time.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met either by the actions of the not-for-profit organization to satisfy a particular purpose restriction, or by the passage of time. Some donor restrictions are perpetual (or permanent) in nature, whereby the donor has stipulated the funds be maintained in perpetuity, whereby the corpus of the donation must remain unspent.

C. Revenue and Revenue Recognition

Revenue is recognized when earned. Operating funds for the School are derived principally from state and federal sources. The School receives state funding based on each of the enrolled student’s average daily attendance (ADA) in its school. The School receives federal grants, which are paid through the California Department of Education or other state agencies. Revenues related to these federal grants are recognized when qualifying expenses have been incurred and when all other grant requirements have been met. Unrestricted support given by the state is recognized as revenue when received. Any such funds received in advance are deferred to the applicable period in which the related services are performed, or expenditures are incurred, respectively.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

D. Donated Materials and Supplies

Donated materials and supplies are recorded as contributions at their estimated fair market value at the date of donation if a value can be reasonably determined. Such donations are reported as increases in unrestricted net assets unless the donor has restricted the donated asset to a specific purpose.

E. Contributed Services

During the year ended June 30, 2021, the value of contributed services meeting the requirements for recognition in the financial statements was not material and has not been recorded. In addition, many individuals volunteer their time and perform a variety of tasks that assist the School, but these services do not meet the criteria for recognition as contributed services.

F. Estimates

The preparation of financial statements in conformity with generally accepted accounting principles required management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from estimates.

G. Income Taxes

The School is a non-profit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3) and California Revenue and Taxation Code Section 23701d. Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School files information returns in the U.S. federal jurisdiction, and the state of California. The statute of limitations for federal and California state tax purposes is generally three and four years, respectively.

H. Cash and Cash Equivalents

The School considers certificates of deposit with a maturity date of 90 days or longer to be investments. At year-end and throughout the year, the School's cash balances were deposited in three financial institutions. As of June 30, 2021, the School held a portion of its reserves in checking, money market accounts, and certificates of deposit.

I. Custodial Credit Risk

The School maintains its cash at three financial institutions. Cash balances are insured up to \$250,000 by the Federal Deposit Insurance Corporation (FDIC) at each institution. At various times during the year, the amount on deposit with a single financial institution may exceed federal depository insurance limits and be exposed to custodial credit risk. As of June 30, 2021, the School had cash in the amount of \$4,004,329 which was exposed to this risk.

J. Investments

Investments are stated at fair value at the Statement of Financial Position date as required by FASB. Net realized and unrealized gains/losses on investments are presented on the Statement of Activities, with respect to any donor restrictions, as investment return. Investment return is presented net of related internal and external fees. The average cost method is used to determine the basis for computing realized gains/losses.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

K. Accounts Receivable

Accounts receivable consists mainly of grants and contract payments from other public agencies. No allowance for uncollectable amounts has been estimated as creditworthiness of payors and industry experience provide evidence to support amounts as fully collectible.

L. Prepaid Items

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items.

M. Property and Equipment

It is the School's policy to capitalize property and equipment over \$5,000. Purchased property and equipment are reported at historical cost or estimated historical cost. Contributed assets are recorded as contributions at their estimated fair value as of the date received. Such donations are reported as unrestricted contributions unless the donor has restricted the donated asset to a specific purpose or time of use. Additions, improvements, and other capital outlays that significantly extend the useful life of an asset are capitalized. Items that, as a whole, create an asset with a combined cost exceeding \$5,000 have also been capitalized. Other costs incurred for repairs and maintenance are expensed as incurred.

Depreciation on all assets is provided on the straight-line basis over the following estimated useful lives:

Description	Estimated Lives
Buildings and Improvements	15-50 years
Land Improvements	20 years
Equipment	5-10 years

N. Unearned Revenues

Unearned revenues represent payments received in advance for services that have not yet been performed or from cost-reimbursement grants for which expenses have not yet been incurred.

O. Fair Value Measurements

In accordance with fair value measurements, the School categorizes its assets and liabilities measured at fair value into a three-level hierarchy based on the priority of the inputs to the valuation technique used to determine fair value. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level 3). If the inputs used in the determination of the fair value measurement fall within different levels of the hierarchy, the categorization is based on the lowest level input that is significant to the fair value measurement.

Financial assets and liabilities recorded on the balance sheet are categorized based on the inputs to the valuation techniques as follows:

Level 1 – Inputs that reflect unadjusted quoted prices in active markets for identical investments, such as stocks, corporate and government bonds. The School has the ability to access the holding and quoted prices as of the measurement date.

Level 2 – Inputs, other than quoted prices, that are observable for the asset or liability either directly or indirectly, including inputs from markets that are not considered to be active.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

O. Fair Value Measurements (continued)

Level 3 – Inputs that are unobservable. Unobservable inputs reflect the School's own assumptions about the factors market participants would use in pricing an investment and is based on the best information available in the circumstances.

P. Functional Allocation of Expenses

The financial statements report certain categories of expenses that are attributable to more than one program or supporting function, as shown in the Statement of Functional Expenses. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. Such allocations are determined by management on an equitable basis.

The expenses that are allocated include the following:

<u>Expense</u>	<u>Method of Allocation</u>
Salaries and benefits	Time and effort
Occupancy / rent	Facilities square footage
Insurance	Policy type and nature of coverage
Utilities	Facilities square footage
Supplies	Time and effort
Depreciation	Facilities square footage

NOTE 2 – LIQUIDITY AND AVAILABLE RESOURCES

The School's financial assets available within one year of the Statement of Financial Position date for general expenditure are as follows:

Cash	\$	4,329,175
Accounts receivable		955,919
Other current assets		95,038
Total financial assets available within one year	\$	<u>5,380,132</u>

The School's policy for liquidity management requires that it structure its financial assets to be available as its general expenditures, liabilities and other obligations come due. Cash in excess of daily requirements is invested in short-term investments. In anticipation of future liquidity needs, the School has available a line of credit in the amount of \$1,000,000.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 3 – INVESTMENTS

The fair values, related measurement input techniques and related maturities of the major type of investments held by the School at June 30, 2021, were as follows:

	Fair Value Input	Maturity (years)			Total
		Less than One	One to Five	Over Five	
Certificates of deposit	Level 1	\$ 516,674	\$ 260,111	\$ -	\$ 776,785
Money market funds	Level 1	256,122	-	-	256,122
Total		<u>\$ 772,796</u>	<u>\$ 260,111</u>	<u>\$ -</u>	<u>\$ 1,032,907</u>

Investment income consisted of the following for the year ended June 30, 2021:

Interest income	\$ 1,288
Dividends	5,261
Realized gains/(losses)	<u>391</u>
Total investment income	<u>\$ 6,940</u>

NOTE 4 – ACCOUNTS RECEIVABLE

Accounts receivable outstanding at June 30, 2021, consisted of the following:

Federal Government	
Special education entitlement	\$ 139,866
Title I	95,611
Food program	76,473
GEER	28,291
State Government	
LCFF	334,862
Lottery	58,682
Expanded learning opportunity- paraprofessional	27,186
Food program	6,381
Expanded learning opportunity	4,369
Local	
Special education	161,129
Other	<u>21,160</u>
Total	<u>\$ 954,010</u>

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 5 – INTERCOMPANY RECEIVABLE

During the regular course of business, one campus will occasionally purchase items that are for both campuses. As of June 30, 2021 Salida owed \$1,909 to Modesto for shared purchases.

NOTE 6 – PROPERTY AND EQUIPMENT

Property and equipment as of June 30, 2021 consisted of the following:

	Balance, July 1, 2020	Additions	Retirements	Balance, June 30, 2021
Property and equipment not being depreciated:				
Land	\$ 1,120,000	\$ -	\$ -	\$ 1,120,000
Total Property and equipment not being depreciated	1,120,000	-	-	1,120,000
Property and equipment being depreciated:				
Improvement of sites	2,338,960	54,200	-	2,393,160
Buildings	2,401,428	-	-	2,401,428
Equipment	264,563	-	-	264,563
Total Property and equipment being depreciated	5,004,951	54,200	-	5,059,151
Accumulated depreciation for:				
Improvement of sites	(756,666)	(175,167)	-	(931,833)
Buildings	(712,687)	(71,713)	-	(784,400)
Equipment	(114,809)	(26,888)	-	(141,697)
Total accumulated depreciation	(1,584,162)	(273,768)	-	(1,857,930)
Total Property and equipment being depreciated, net	3,420,789	(219,568)	-	3,201,221
Property and equipment, net of depreciation	\$ 4,540,789	\$ (219,568)	\$ -	\$ 4,321,221

Depreciation expense for the year ended June 30, 2021, is \$273,768.

NOTE 7- INTERCOMPANY PAYABLE

During the 2020-21 school year, the School would receive one check from the State for all student nutrition revenue. The funds are deposited into Modesto's bank account. The balance of \$58,607 at June 30, 2021 consists of student nutrition funds owed to Salida.

NOTE 8 – NET DEFERRED PAY

Great Valley Academy provides elected certificated and classified employees who receive pay in the 11-month cycle the option to opt-in to deferred net pay plan. This allows elected employees to receive 12 paychecks during the year. The final check is not a payroll check, rather money that is withheld at 8.33% of net pay for all pay periods August 2020 through June 2021. As of June 30, 2021, the Charter had an obligation to pay deferred net pay of \$263,411, comprised of \$128,841 for Modesto and \$134,570 for Salida. Modesto acts as the trustee for Salida's net deferred pay. The obligation payable at June 30, 2021, is not recognized on Salida's Statement of Financial Position as it is satisfied by Modesto on Salida's behalf.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 9 – LONG TERM LIABILITIES

A schedule of change in long-term liabilities for the year ended June 30, 2021, is shown below:

	Balance, July 01, 2020	Additions	Deductions	Balance, June 30, 2021	Amount Due in One Year
Mortgage note payable	\$ 1,536,433	\$ -	\$ 138,091	\$ 1,398,342	\$ 145,184

Mortgage Note

On May 14, 2010, Great Valley Academy - Modesto completed the purchase of the building which it had previously been leasing. The property was purchased for a price of \$3,250,000 from Modesto's Neighborhood Church. The agreement called for Great Valley Academy - Modesto to carry a note payable to the Church in the amount of \$2,975,000. The terms of the note required monthly payments of \$17,512 beginning on June 14, 2010 and ending on May 14, 2015, including interest at a rate of 6.75%, and monthly payments of \$15,704 beginning on May 14, 2015 and ending on April 14, 2020, including interest at a rate of 8.0%.

On July 8, 2014, Great Valley Academy refinanced the mortgage note previously held with Modesto Neighborhood Church with the Bank of Stockton. The new mortgage note assumed is \$2,226,000 with monthly payments of \$17,672. The note matures on July 5, 2029 and bears a fixed rate of interest of 4.95%. At June 30, 2021, the total balance outstanding on the note was \$1,398,342. The amounts required to amortize the outstanding balance at June 30, 2021, are as follows:

Fiscal Year	Principal	Interest	Total
2021-22	\$ 145,184	\$ 66,878	\$ 212,062
2022-23	152,640	59,421	212,061
2023-24	160,341	51,720	212,061
2024-25	168,714	43,347	212,061
2025-26	177,379	34,682	212,061
2026-30	594,084	47,555	641,639
Total	\$ 1,398,342	\$ 303,603	\$ 1,701,945

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 10 – NET ASSETS

Donor-restricted net assets at June 30, 2021, were comprised of the following amounts and restrictions:

Net assets with purpose restriction:

Expanded learning opportunity	\$	147,914
Child nutrition		75,366
Expanded learning opportunity paraprofessional		54,338
Classified professional development grant		1,595
Total	\$	<u>279,213</u>

These amounts are presented within net assets with donor restrictions on the Statement of Financial Position.

NOTE 11 – EMPLOYEE RETIREMENT PLANS

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. Certificated employees are members of the California State Teachers' Retirement System (CalSTRS), and eligible classified employees may contribute to the Great Valley Academy - Modesto 401(k) Plan and Trust. The School is a participant in the plans and its contributions to CalSTRS do not exceed 5% of total plan-level contributions.

The details of each plan are as follows:

A. California State Teachers' Retirement System (CalSTRS)

Plan Description

The School contributes to the State Teachers Retirement Plan (STRP) administered by the California State Teachers' Retirement System (CalSTRS). STRP is a cost-sharing multiple-employer public employee retirement system defined benefit pension plan. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law.

A full description of the pension plan regarding benefit provisions, assumptions (for funding, but not accounting purposes), and membership information is listed in the June 30, 2019, annual actuarial valuation report, Defined Benefit Program Actuarial Valuation. This report and CalSTRS audited financial information are publicly available reports that can be found on the CalSTRS website under Publications at: <https://www.calstrs.com/general-information/gasb-6768>.

Benefits Provided

The STRP provides retirement, disability and survivor benefits to beneficiaries. Benefits are based on members' final compensation, age, and years of service credit. Members hired on or before December 31, 2012, with five years of credited service are eligible for the normal retirement benefit at age 60. Members hired on or after January 1, 2013, with five years of credited service are eligible for the normal retirement benefit at age 62. The normal retirement benefit is equal to 2.0% of final compensation for each year of credited service.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 11 – EMPLOYEE RETIREMENT PLANS (continued)

A. California State Teachers' Retirement System (CalSTRS) (continued)

Benefits Provided (continued)

The School STRP is comprised of four programs: Defined Benefit Program, Defined Benefit Supplement Program, Cash Balance Benefit Program, and Replacement Benefits Program. The STRP holds assets for the exclusive purpose of providing benefits to members and beneficiaries of these programs. CalSTRS also uses plan assets to defray reasonable expenses of administering the STRP. Although CalSTRS is the administrator of the STRP, the State is the sponsor of the STRP and obligor of the trust. In addition, the State is both an employer and non-employer contributing entity to the STRP. The School contributes exclusively to the STRP Defined Benefit Program; thus, disclosures are not included for the other plans.

The STRP provisions and benefits in effect at June 30, 2021, are summarized as follows:

	STRP Defined Benefit Program	
	On or before December 31, 2012	On or after January 1, 2013
Hire Date		
Benefit Formula	2% at 60	2% at 62
Benefit Vesting Schedule	5 years of service	5 years of service
Benefit Payments	Monthly for life	Monthly for life
Retirement Age	60	62
Monthly Benefits as a Percentage of Eligible Compensation	2.0%-2.4%	2.0%-2.4%
Required Member Contribution Rate	10.25%	10.205%
Required Employer Contribution Rate	16.15%	16.15%
Required State Contribution Rate	10.328%	10.328%

Contributions

Required member School and State of California contributions rates are set by the California Legislature and Governor and detailed in Teachers' Retirement Law. The contributions rates are expressed as a level percentage of payroll using the entry age normal actuarial method. In June 2019, California Senate Bill 90 (SB 90) was signed into law and appropriated approximately \$2.2 billion in fiscal year 2018–19 from the state's General Fund as contributions to CalSTRS on behalf of employers. The bill requires portions of the contribution to supplant the amounts remitted by employers such that the amounts remitted will be 1.03 and 0.70 percentage points less than the statutorily required amounts due for fiscal years 2019–20 and 2020–21, respectively. The remaining portion of the contribution, approximately \$1.6 billion, was allocated to reduce the employers' share of the unfunded actuarial obligation of the Defined Benefit Program.

The School's contributions to CalSTRS and required employer contribution rate for the last three fiscal years were as follows:

	Contribution	Required Contribution Rate
2020-21	\$ 546,316	16.15%
2019-20	\$ 510,554	17.10%
2018-19	\$ 461,298	16.28%

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 11 – EMPLOYEE RETIREMENT PLANS (continued)

A. California State Teachers' Retirement System (CalSTRS) (continued)

On-Behalf Payments

The State of California makes contributions to CalSTRS on behalf of the School. These payments consist of State General Fund contributions to CalSTRS pursuant to Sections 22954 and 22955.1 of the Education Code and Public Resources Code Section 6217.5. In addition, for the 2018-19 fiscal year, California Senate Bill No. 90 (SB 90) was signed into law on June 27, 2019, and appropriated supplemental contributions. Under accounting principles generally accepted in the United States of America, these amounts are reported as revenues and expenditures in the fund financial statements. The total amount recognized by the School for its proportionate share of the State's on-behalf contributions is \$87,576.

B. 401(k) Plan

The School has established a 401K defined contribution retirement plan, whereby all eligible classified employees may elect to defer a portion of their salary into a separate retirement plan trust. Per the plan agreement, there is a requirement for the School to match employee salary elective deferrals up to 4%. For the year ending June 30, 2021, total employer contributions to the plan was \$42,540.

NOTE 12 – OPERATING LEASES

The School has entered into various operating leases for the use of office space and office equipment.

A. Facility Operating Leases

In August 2015, the School entered into an operating lease agreement with Tully Manor Investments, LLC for office space for its homeschool program, located in Modesto, CA. Payments are required monthly and initial base rental fee was \$1,979 per month. In May 2020, the School entered into a new agreement to renew its lease at a base rental fee of \$5,589.60 per month. The lease is set to expire on June 30, 2025.

In December 2018, the School entered into an operating lease agreement with Tully Manor Investments, LLC for a second office space for its homeschool program, located in Modesto, CA. Payments are required monthly and the initial base rental fee is \$1,297 per month for a 22-month term.

Future minimum payments due on the facilities operating leases are:

Fiscal Year	Payments
2021-22	\$ 67,075
2022-23	67,075
2023-24	67,075
2024-25	67,075
Total	<u>\$ 268,300</u>

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 12 – OPERATING LEASES (continued)

B. Office Equipment Operating Leases

In October 2018, the School entered into an operating lease agreement with CIT Bank, N.A. for additional office equipment for its main campus, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$396 per month for a term of 48 months.

In August 2019, the School entered into an operating lease agreement with Wells Fargo Bank for additional office equipment for its main campus, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$296 per month for a term of 60 months.

In November 2020, the School entered into an operating lease agreement with U.S. Bank for office equipment for its homeschool program, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$533 per month for a term of 60-months.

Future minimum payments due on the facilities operating leases are:

<u>Fiscal Year</u>	<u>Payments</u>
2021-22	\$ 14,338
2022-23	10,777
2023-24	9,590
2024-25	6,926
2025-26	<u>2,664</u>
Total	<u>\$ 44,295</u>

NOTE 13 – LINE OF CREDIT

The School maintains an agreement with the Bank of Stockton for a line of credit in the amount of \$1,000,000. The line of credit is secured by the School's assets. As of June 30, 2021, there was no balance owed on the line of credit. The line of credit carries an interest rate of 7.0% and requires monthly payments when balances are owed.

NOTE 14 – COMMITMENTS AND CONTINGENCIES

State and Federal Funds

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate expenditure disallowances under terms of the grants, it is believed that any required reimbursement will not be material.

GREAT VALLEY ACADEMY - MODESTO

Notes to Financial Statements

June 30, 2021

NOTE 15 – JPA INFORMATION

The Great Valley Academy - Modesto participates in a joint venture under a joint powers agreement (JPA) with Charter Safe. The School Safe JPA provides property and liability insurance and workers compensation coverage for its members. The JPA is governed by a board consisting of a representative from each member agency. The governing board controls the operations of the JPA independent of any influence by the member agencies beyond their representation on the governing board. Each member pays a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionately to its participation in the JPA.

Condensed unaudited financial information for Charter Safe for the year ended June 30, 2021, is as follows:

	Charter Safe
Total Assets	<u>\$ 41,545,217</u>
Total Liabilities	<u>32,745,829</u>
Net Assets	<u><u>\$ 8,799,388</u></u>
 Total Revenues	 \$ 35,024,544
Cost of Sales	(24,354,088)
Total Expenses	<u>4,431,971</u>
Net Income (Loss)	<u><u>\$ 6,238,485</u></u>

NOTE 16 – SUBSEQUENT EVENTS

Events subsequent to June 30, 2021, have been evaluated through November 17, 2021, the date at which the School's audited financial statements were available to be issued.

Supplementary Information

GREAT VALLEY ACADEMY - MODESTO
Local Education Agency Organizational Structure
June 30, 2021

The Great Valley Academy - Modesto (Charter No. 0985) was authorized as a California charter school in February, 2008 by the Stanislaus County Office of Education. The School provides classroom and non-classroom-based instruction to students in kindergarten and grades 1-8, and is located in Modesto, California.

BOARD OF DIRECTORS		
Member	Office	Term Expires
Steve Payne	President	June 2022
Yolanda Meraz	Vice President	June 2023
Susan Nisan	Secretary	June 2022
Twila Tosh	Salida Authorizing Agency Designee	August 2022
Vince Jamison	Board Member	June 2023
Chad Wolf	Board Member	June 2021

ADMINISTRATORS

Leah Silvestre Franklin,
Chief Executive Officer

Marisa Jacobson-Meeks,
Chief Operating Officer

Dr. Eldon Rosenow,
Founder

GREAT VALLEY ACADEMY - MODESTO*Schedule of Instructional Time**For the Fiscal Year Ended June 30, 2021*

Grade Level	Actual Number of Instructional Days	Number of Days from J-13A Waiver	Total	Status
Kindergarten	176	0	176	Complied
Grade 1	176	0	176	Complied
Grade 2	176	0	176	Complied
Grade 3	176	0	176	Complied
Grade 4	176	0	176	Complied
Grade 5	176	0	176	Complied
Grade 6	176	0	176	Complied
Grade 7	176	0	176	Complied
Grade 8	176	0	176	Complied

GREAT VALLEY ACADEMY - MODESTO*Reconciliation of Annual Financial and Budget Report with Audited Financial Statements
For the Fiscal Year Ended June 30, 2021*

June 30, 2021, annual financial and budget report net assets	\$ 8,649,664
Adjustments and reclassifications:	
Accounts payable	<u>1,600</u>
Net adjustments and reclassification	<u>1,600</u>
June 30, 2021, audited financial statement net assets	<u><u>\$ 8,651,264</u></u>

GREAT VALLEY ACADEMY - MODESTO

Note to the Supplementary Information

June 30, 2021

NOTE 1 – PURPOSE OF SCHEDULES

Schedule of Instructional Time

This schedule presents information on the number of instructional days offered by the School and whether the School complied with Article 8 (commencing with Section 46200) of Chapter 2 Part 26 of the *Education Code*.

Reconciliation of Annual Financial and Budget Report with Audited Financial Statements

This schedule provides the information necessary to reconcile the fund balance reported on the Unaudited Actual financial report to the audited financial statements.

Other Independent Auditors' Reports



**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL
REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN
AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE
WITH *GOVERNMENT AUDITING STANDARDS***

Board of Directors
Great Valley Academy - Modesto
Modesto, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Great Valley Academy - Modesto (a nonprofit organization), which comprise the statement of financial position as of June 30, 2021 and the related statement of activities, statement of functional expenses, and cash flows for the fiscal year then ended, and the related notes to the financial statements, and have issued our report thereon dated November 17, 2021.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered Great Valley Academy - Modesto's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Great Valley Academy - Modesto's internal control. Accordingly, we do not express an opinion on the effectiveness of the Great Valley Academy - Modesto's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. *A material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the School's financial statements will not be prevented, or detected and corrected on a timely basis. *A significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

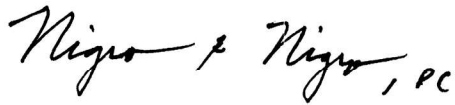
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Great Valley Academy - Modesto's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances, of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink that reads "Nigro & Nigro, PC". The signature is written in a cursive, flowing style.

Murrieta, California
November 17, 2021



INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE

Board of Directors
Great Valley Academy - Modesto
Modesto, California

Report on State Compliance

We have audited Great Valley Academy - Modesto's compliance with the types of compliance requirements described in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* that could have a direct and material effect on each of the Great Valley Academy's state government programs as noted on the following page for the fiscal year ended June 30, 2021.

Management's Responsibility

Management is responsible for compliance with state laws, regulations, and the terms and conditions of its State programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Great Valley Academy - Modesto's state programs based on our audit of the types of compliance requirements referred to on the following page. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to on the following page that could have a direct and material effect on a state program occurred. An audit includes examining, on a test basis, evidence about Great Valley Academy - Modesto's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each state program. However, our audit does not provide a legal determination of Great Valley Academy - Modesto's compliance.

In connection with the audit referred to above, we selected and tested transactions and records to determine the School's compliance with the State laws and regulations applicable to the following items:

Description	Procedures Performed
Local Education Agencies Other Than Charter Schools (Applicable to Classroom-Based Charters in FY 2020/21)	
Attendance and Distance Learning	Yes
Instructional Time	Yes

Description	Procedures Performed
School Districts, County Offices of Education, and Charter Schools:	
California Clean Energy Jobs Act	Not Applicable
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Formula Pupil Counts	Yes
Independent Study – Course Based	Not Applicable
Charter Schools:	
Attendance	Yes
Mode of Instruction	Yes
Nonclassroom-Based Instruction/Independent Study	Not Applicable
Determination of Funding for Nonclassroom-Based Instruction	Not Applicable
Charter School Facility Grant Program	Not Applicable

Unmodified Opinion on Compliance with State Programs

In our opinion, Great Valley Academy - Modesto complied, in all material respects, with the types of compliance requirements referred to above for the year ended June 30, 2021.

Nigro & Nigro, PC

Murrieta, California
November 17, 2021

Schedule of Findings and Recommendations

GREAT VALLEY ACADEMY - MODESTO

Summary of Auditors' Results

For the Fiscal Year Ended June 30, 2021

Financial Statements

Type of auditors' report issued	<u>Unmodified</u>
Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Noncompliance material to financial statements noted?	<u>No</u>

Federal Awards

Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Type of auditors' report issued on compliance for major programs:	<u>Unmodified</u>
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance, Section 200.516	<u>Yes</u>
Identification of major programs:	
<u>CFDA Numbers</u>	<u>Name of Program/ Cluster</u>
	<i>COVID - Coronavirus Relief Fund (CRF):</i>
<u>21.019</u>	<u>Learning Loss Mitigation</u>
	<i>Special Education- Local Assistance</i>
<u>84.027</u>	<u>Entitlement</u>

Dollar threshold used to distinguish between Type A and Type B Programs:	<u>\$ 750,000</u>
Auditee qualified as low-risk auditee?	<u>No</u>

State Awards

Type of auditors' report issued on compliance for state programs:	<u>Unmodified</u>
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GREAT VALLEY ACADEMY - MODESTO

Financial Statement Findings

For the Fiscal Year Ended June 30, 2021

This section identifies the significant deficiencies, material weaknesses, and instances of noncompliance related to the financial statements that are required to be reported in accordance with *Government Auditing Standards*. Pursuant to Assembly Bill (AB) 3627, all audit findings must be identified as one or more of the following categories:

Five Digit Code	AB 3627 Finding Types
10000	Attendance
20000	Inventory of Equipment
30000	Internal Control
40000	State Compliance
42000	Charter School Facilities Programs
43000	Apprenticeship: Related and Supplemental Instruction
50000	Federal Compliance
60000	Miscellaneous
61000	Classroom Teacher Salaries
62000	Local Control Accountability Plan
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

There were no financial statement findings in 2020-21.

GREAT VALLEY ACADEMY - MODESTO

Federal Award Findings and Recommendations

For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings required to be reported by the Uniform Guidance, Section 200.516 (e.g., significant deficiencies, material weaknesses, and instances of noncompliance, including questioned costs).

FINDING 2021-001: PROCUREMENT POLICY (50000)

CFDA #84.027 — U.S. Department of Education

Passed through Stanislaus County Office of Education

Special Education Cluster

Criteria: Non-Federal entities other than States, including those operating Federal programs as subrecipients of States, must follow the procurement standards set out at 2 CFR sections 200.318 through 200.326. They must use their own documented procurement procedures, which reflect applicable state and local laws and regulations, provided that the procurements conform to applicable Federal statutes and the procurement requirements identified in 2 CFR part 200.

Condition: The School's written procurement and purchasing procedures and board policies do not reflect the requirements identified in 2 CFR part 200.

Questioned Cost: N/A

Context: N/A

Effect: Lack of a specific Federal procurement written policy that conforms to all applicable Federal statutes and the procurement requirements could lead to a lack of control over procurement transactions.

Cause: The School was unaware of the requirement to maintain a documented policy that conforms to applicable Federal statutes and the procurement requirements.

Recommendation: We recommend that the School adopt a written policy which reflects applicable state, local, and Federal statutes and the procurement requirements identified in 2 CFR part 200. In addition, it is recommended that the School maintain a detailed administrative regulation or procedures manual addressing the mandated components.

Views of Responsible Officials: Board approved fiscal and procurement policy was in place for 2020-21 that met Federal requirements with the exception of vendor debarment verification and micro purchase threshold of \$10,000. GVA's policy stated \$15,000 for micro purchases. The Federal food program met the procurement and bid requirements as outlined by Federal policy which is the program with the largest amount of Federal revenue for GVA. All other Federal funds were not expended to the \$750,000 threshold and would not have triggered a single audit in 2020-21 but because the combination of all Federal funds exceeded \$750,000, the Federal procurement processes came under audit sooner than anticipated.

A revision to the current GVA fiscal and procurement policy with added Federal requirements will be board approved and implemented in 2021-22.

GREAT VALLEY ACADEMY - MODESTO

State Award Findings and Recommendations

For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings pertaining to noncompliance with state program rules and regulations.

There were no state award findings or recommendations in 2020-21.

GREAT VALLEY ACADEMY - MODESTO

Summary Schedule of Prior Audit Findings

For the Fiscal Year Ended June 30, 2021

There were no findings or responses in 2019-20.

**GREAT VALLEY ACADEMY – SALIDA
SALIDA, CALIFORNIA**

Charter No. 1819

**FINANCIAL STATEMENTS AND
INDEPENDENT AUDITORS' REPORT**

**For the Fiscal Year Ended
June 30, 2021**

NIGRO & NIGRO^{PC}

GREAT VALLEY ACADEMY - SALIDA

For the Fiscal Year Ended June 30, 2021

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Financial Section



INDEPENDENT AUDITORS' REPORT

Board of Directors
Great Valley Academy - Salida
Modesto, California

Report on the Financial Statements

We have audited the accompanying financial statements of Great Valley Academy - Salida (a California nonprofit Organization), which comprise the statement of financial position as of June 30, 2021, and the related statements of activities, cash flows, and functional expenses for the fiscal year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2019-20 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

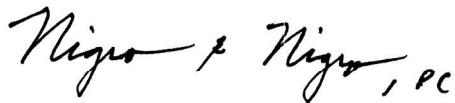
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Great Valley Academy - Salida as of June 30, 2021, and the changes in its net assets and its cash flows for the fiscal year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters*Other Information*

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The supplementary information is presented for purposes of additional analysis and is not a required part of the financial statements. The supplementary information on pages 17 and 18 is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. Such information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole. The information on page 16 has not been subjected to the auditing procedures applied in the audit of the financial statements and accordingly, we do not express an opinion or provide any assurance on it.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated November 17, 2021, on our consideration of the Great Valley Academy - Salida's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

A handwritten signature in cursive script that reads "Nigro & Nigro, PC".

Murrieta, California
November 17, 2021

GREAT VALLEY ACADEMY - SALIDA*Statement of Financial Position**June 30, 2021*

ASSETS

Current Assets:

Cash	\$ 1,926,606
Accounts receivable (Note 3)	2,550,114
Intercompany receivable (see Note 4)	58,607
Other current assets	7,070
Total current assets	<u>4,542,397</u>

Non-current Assets:

Property and equipment (Note 6):

Non-depreciable assets	950,000
Depreciable assets	7,992,235
Less accumulated depreciation	<u>(1,369,446)</u>
Property and equipment, net	<u>7,572,789</u>

Total Assets	<u><u>\$ 12,115,186</u></u>
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LIABILITIES AND NET ASSETS**Liabilities**

Current Liabilities:

Accounts payable	\$ 308,725
Accrued payroll and benefits	91,483
Intercompany payable (Note 7)	1,909
Unearned revenues	12,389
Mortgage payable, current portion (Note 9)	<u>126,476</u>
Total current liabilities	<u>540,982</u>

Non-current Liabilities:

Mortgage payable (Note 9)	<u>4,280,751</u>
Total non-current liabilities	<u>4,280,751</u>

Total liabilities	<u>4,821,733</u>
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Net assets

Without donor restrictions	7,048,810
With donor restrictions (Note 5)	<u>244,643</u>
Total net assets	<u>7,293,453</u>

Total Liabilities and Net Assets	<u><u>\$ 12,115,186</u></u>
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GREAT VALLEY ACADEMY - SALIDA*Statement of Activities**For the Fiscal Year Ended June 30, 2021*

	Without Donor Restrictions	With Donor Restrictions	Total
REVENUES AND OTHER SUPPORT			
LCFF apportionment	\$ 6,062,057	\$ -	\$ 6,062,057
Education Protection Account	170,184	-	170,184
In-lieu property tax transfers	1,175,257	-	1,175,257
Special education property tax transfers	-	135,372	135,372
Federal grants	-	413,681	413,681
Federal special education awards	-	101,179	101,179
Federal food program	-	277,737	277,737
State food program	-	59,535	59,535
Lottery	149,648	64,169	213,817
Other state sources	27,614	514,760	542,374
STRS on-behalf contribution	80,135	-	80,135
Local special education transfers	-	420,064	420,064
Other local revenues	45,895	-	45,895
Net assets released from restrictions	1,836,600	(1,836,600)	-
Total revenues and other support	9,547,390	149,897	9,697,287
EXPENSES			
Program services:			
Instruction	5,099,625	-	5,099,625
Instruction-related services	881,397	-	881,397
Pupil services	843,514	-	843,514
Ancillary services	233,181	-	233,181
Depreciation	374,089	-	374,089
Total program services	7,431,806	-	7,431,806
Management and general:			
General administration	766,692	-	766,692
Plant services	552,322	-	552,322
Depreciation	2,110	-	2,110
Interest expense	256,994	-	256,994
Total management and general	1,578,118	-	1,578,118
Total expenses	9,009,924	-	9,009,924
Change in net assets from operations	537,466	149,897	687,363
OTHER GAINS/(LOSSES)			
Interest earned	1,407	-	1,407
Total Other Gains/(Losses)	1,407	-	1,407
Change in net assets	538,873	149,897	688,770
NET ASSETS:			
Beginning of year	6,509,937	94,746	6,604,683
End of year	\$ 7,048,810	\$ 244,643	\$ 7,293,453

See accompanying notes and auditors' report.

GREAT VALLEY ACADEMY - SALIDA*Statement of Cash Flows**For the Fiscal Year Ended June 30, 2021*

CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	\$	688,770
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities:		
Depreciation expense		376,198
(Increase) decrease in operating assets:		
Accounts receivable		(1,608,358)
Intercompany receivable		(58,607)
Other current assets		6,171
Increase (decrease) in operating liabilities:		
Accounts payable		44,990
Accrued payroll and benefits		19,009
Unearned revenue		6,232
Intercompany payable		(22,001)
Net cash provided (used) by operating activities		<u>(547,596)</u>

CASH FLOWS FROM INVESTING ACTIVITIES

Purchase of equipment, furniture and building improvements		<u>(52,913)</u>
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CASH FLOWS FROM FINANCING ACTIVITIES

Payments on Salida mortgage		<u>(120,322)</u>
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Net increase (decrease) in cash		(720,831)
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Cash:

Beginning of year		<u>2,647,437</u>
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End of year	\$	<u><u>1,926,606</u></u>
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SUPPLEMENTAL DISCLOSURE

Interest paid	\$	<u><u>256,994</u></u>
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GREAT VALLEY ACADEMY - SALIDA*Statement of Functional Expenses**For the Fiscal Year Ended June 30, 2021*

	Program Services	Management and General	Total
Salaries and Benefits			
Certificated salaries	\$ 3,285,688	\$ -	\$ 3,285,688
Classified salaries	1,013,777	555,766	1,569,543
Employee benefits	1,226,713	174,577	1,401,290
Total Salaries and Benefits	5,526,178	730,343	6,256,521
 Supplies and Operating Expenses			
Books and supplies	873,752	89,552	963,304
Services and other operating expenses	657,788	499,119	1,156,907
Allocated depreciation	374,088	2,110	376,198
Other outgo	-	256,994	256,994
Total Supplies and Operating Expenses	1,905,628	847,775	2,753,403
 Totals	\$ 7,431,806	\$ 1,578,118	\$ 9,009,924

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. Nature of Activities

In February 2008, Great Valley Academy (the “Charter”) was approved to operate as a California charter school by the Stanislaus County Office of Education. The School was formed as an Internal Revenue Code (IRC) Section 501(c)(3) non-profit public benefit corporation. In 2016-17, the School opened another school called Great Valley Academy – Salida (the “School”). The School was opened under the approval of the Salida Union Elementary School District and operates kindergarten and grades 1-8. This school offers all classroom-based education programs. The primary source of revenue for the School comes from federal and state contract payments.

B. Basis of Presentation and Accounting

The School accounts for its financial transactions in accordance with the policies and procedures of the Department of Education’s *California School Accounting Manual*.

The financial statements of the School have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America. The financial statements are presented in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958 dated August 2016, and the provisions of the American Institute of Certified Public Accountants (AICPA) “Audit and Accounting Guide for Not-for-Profit Organizations” (the “Guide”). ASC 958-205 was effective January 1, 2018 and addresses general-purpose external financial statements appropriate for not-for-profit organizations.

Under the provisions of the ASC 958-205, net assets and revenues, and gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the School and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the School. The School’s board may designate assets without restrictions for specific operational purposes from time to time.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met either by the actions of the not-for-profit organization to satisfy a particular purpose restriction, or by the passage of time. Some donor restrictions are perpetual (or permanent) in nature, whereby the donor has stipulated the funds be maintained in perpetuity, whereby the corpus of the donation must remain unspent.

C. Revenue and Revenue Recognition

Revenue is recognized when earned. Operating funds for the School are derived principally from state and federal sources. The School receives state funding based on each of the enrolled student’s average daily attendance (ADA) in its school. The School receives federal grants, which are paid through the California Department of Education or other state agencies. Revenues related to these federal grants are recognized when qualifying expenses have been incurred and when all other grant requirements have been met. Unrestricted support given by the state is recognized as revenue when received. Any such funds received in advance are deferred to the applicable period in which the related services are performed, or expenditures are incurred, respectively.

D. Donated Materials and Supplies

Donated materials and supplies are recorded as contributions at their estimated fair market value at the date of donation if a value can be reasonably determined. Such donations are reported as increases in unrestricted net assets unless the donor has restricted the donated asset to a specific purpose.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

E. Contributed Services

During the year ended June 30, 2021, the value of contributed services meeting the requirements for recognition in the financial statements was not material and has not been recorded. In addition, many individuals volunteer their time and perform a variety of tasks that assist the School, but these services do not meet the criteria for recognition as contributed services.

F. Estimates

The preparation of financial statements in conformity with generally accepted accounting principles required management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from estimates.

G. Income Taxes

The School is a non-profit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3) and California Revenue and Taxation Code Section 23701d. Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School files information returns in the U.S. federal jurisdiction, and the state of California. The statute of limitations for federal and California state tax purposes is generally three and four years, respectively.

H. Cash and Cash Equivalents

The School considers certificates of deposit with a maturity date of 90 days or longer to be investments. At year-end and throughout the year, the School's cash balances were deposited in three financial institutions. As of June 30, 2021, the School did not hold any cash as investments.

I. Custodial Credit Risk

The School maintains its cash at three financial institutions. Cash balances are insured up to \$250,000 by the Federal Deposit Insurance Corporation (FDIC) at each institution. At various times during the year, the amount on deposit with a single financial institution may exceed federal depository insurance limits and be exposed to custodial credit risk. As of June 30, 2021, the School had cash in the amount of \$1,678,896 which was exposed to this risk.

J. Accounts Receivable

Accounts receivable consists mainly of grants and contract payments from other public agencies. No allowance for uncollectable amounts has been estimated as creditworthiness of payors and industry experience provide evidence to support amounts as fully collectible.

K. Prepaid Items

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items.

L. Property and Equipment

It is the School's policy to capitalize property and equipment over \$5,000. Purchased property and equipment are reported at historical cost or estimated historical cost. Contributed assets are reorded as contributions at their estimated fair value as of the date received. Such donations are reported as unrestricted contributions unless the donor has restricted the donated asset to a specific purpose or time of use. Additions, improvements, and other capital outlays that significantly extend the useful life of an asset are capitalized. Items that, as a whole, create an asset with a combined cost exceeding \$5,000 have also been capitalized. Other costs incurred for repairs and maintenance are expensed as incurred.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

L. Property and Equipment (continued)

Depreciation on all assets is provided on the straight-line basis over the following estimated useful lives:

Description	Estimated Lives
Buildings and Improvements	15-50 years
Land Improvements	20 years
Equipment	5-10 years

M. Unearned Revenues

Unearned revenues represent payments received in advance for services that have not yet been performed or from cost-reimbursement grants for which expenses have not yet been incurred.

N. Fair Value Measurements

In accordance with fair value measurements, the School categorizes its assets and liabilities measured at fair value into a three-level hierarchy based on the priority of the inputs to the valuation technique used to determine fair value. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level 3). If the inputs used in the determination of the fair value measurement fall within different levels of the hierarchy, the categorization is based on the lowest level input that is significant to the fair value measurement.

Financial assets and liabilities recorded on the balance sheet are categorized based on the inputs to the valuation techniques as follows:

Level 1 – Inputs that reflect unadjusted quoted prices in active markets for identical investments, such as stocks, corporate and government bonds. The School has the ability to access the holding and quoted prices as of the measurement date.

Level 2 – Inputs, other than quoted prices, that are observable for the asset or liability either directly or indirectly, including inputs from markets that are not considered to be active.

Level 3 – Inputs that are unobservable. Unobservable inputs reflect the School's own assumptions about the factors market participants would use in pricing an investment and is based on the best information available in the circumstances.

O. Functional Allocation of Expenses

The financial statements report certain categories of expenses that are attributable to more than one program or supporting function, as shown in the Statement of Functional Expenses. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. Such allocations are determined by management on an equitable basis.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

O. Functional Allocation of Expenses (continued)

The expenses that are allocated include the following:

<u>Expense</u>	<u>Method of Allocation</u>
Salaries and benefits	Time and effort
Occupancy / rent	Facilities square footage
Insurance	Policy type and nature of coverage
Utilities	Facilities square footage
Supplies	Time and effort
Depreciation	Facilities square footage

NOTE 2 – LIQUIDITY AND AVAILABLE RESOURCES

The School's financial assets available within one year of the Statement of Financial Position date for general expenditure are as follows:

Cash	\$	1,926,606
Accounts receivable		2,550,114
Intercompany receivable		58,607
Prepaid expenses		7,070
Total financial assets available within one year	\$	<u>4,542,397</u>

The School's policy for liquidity management requires that it structure its financial assets to be available as its general expenditures, liabilities and other obligations come due. Cash in excess of daily requirements is invested in short-term investments. In anticipation of future liquidity needs, the School has available a line of credit in the amount of \$1,000,000.

NOTE 3 – ACCOUNTS RECEIVABLE

Accounts receivable outstanding at June 30, 2021, consisted of the following:

Federal Government		
Special education entitlement	\$	101,179
Food program		62,250
Title I		59,143
GEER		8,525
State Government		
LCFF		2,057,878
Lottery		56,331
Expanded learning opportunity- paraprofessional		25,746
In person instruction grant		24,473
Food program		7,143
Expanded learning opportunity		4,399
Local		
Special education		140,517
Other		2,530
Total	\$	<u>2,550,114</u>

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 4- INTERCOMPANY RECEIVABLE

During the 2020-21 school year, the School received one check from the State for all student nutrition revenue. The funds are deposited into Modesto's bank account. The balance of \$58,607 at June 30, 2021 consists of student nutrition funds owed to Salida.

NOTE 5 – NET ASSETS

Donor-restricted net assets at June 30, 2021, were comprised of the following amounts and restrictions:

Net assets with purpose restriction:

Expanded learning opportunity	\$	148,762
Expanded learning opportunity paraprofessional		51,427
Child nutrition		29,917
Lottery		6,930
SB 117 COVID-19		5,670
Prop 39 COVID grant		1,937
Total	\$	<u>244,643</u>

These amounts are presented within net assets with donor restrictions on the Statement of Financial Position.

NOTE 6 – PROPERTY AND EQUIPMENT

Property and equipment as of June 30, 2021 consisted of the following:

	Balance, July 1, 2020	Additions	Retirements	Balance, June 30, 2021
Property and equipment not being depreciated:				
Land	\$ 950,000	\$ -	\$ -	\$ 950,000
Total Property and equipment not being depreciated	<u>950,000</u>	<u>-</u>	<u>-</u>	<u>950,000</u>
Property and equipment being depreciated:				
Improvement of sites	3,684,802	41,402	-	3,726,204
Buildings	4,048,676	-	-	4,048,676
Equipment	205,844	11,511	-	217,355
Total Property and equipment being depreciated	<u>7,939,322</u>	<u>52,913</u>	<u>-</u>	<u>7,992,235</u>
Accumulated depreciation for:				
Improvement of sites	(518,969)	(247,871)	-	(766,840)
Buildings	(389,676)	(103,812)	-	(493,488)
Equipment	(84,603)	(24,515)	-	(109,118)
Total accumulated depreciation	<u>(993,248)</u>	<u>(376,198)</u>	<u>-</u>	<u>(1,369,446)</u>
Total Property and equipment being depreciated, net	<u>6,946,074</u>	<u>(323,285)</u>	<u>-</u>	<u>6,622,789</u>
Property and equipment, net of depreciation	<u>\$ 7,896,074</u>	<u>\$ (323,285)</u>	<u>\$ -</u>	<u>\$ 7,572,789</u>

Depreciation expense for the year ended June 30, 2021, is \$376,198.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 7- INTERCOMPANY PAYABLE

During the regular course of business, one campus will occasionally purchase items that are for both campuses. As of June 30, 2021 Salida owed \$1,909 to Modesto for shared purchases

NOTE 8 – NET DEFERRED PAY

Great Valley Academy provides elected certificated and classified employees who receive pay in the 11-month cycle the option to opt-in to deferred net pay plan. This allows elected employees to receive 12 paychecks during the year. The final check is not a payroll check, rather money that is withheld at 8.33% of net pay for all pay periods August 2020 through June 2021. As of June 30, 2021, the Charter had an obligation to pay deferred net pay of \$263,411, comprised of \$128,841 for Modesto and \$137,570 for Salida. Modesto acts as the trustee for Salida's net deferred pay. The obligation payable at June 30, 2021, is not recognized on Salida's Statement of Financial Position as it is satisfied by Modesto on Salida's behalf.

NOTE 9 – LONG TERM LIABILITIES

A schedule of changes in long-term liabilities for the year ended June 30, 2021, is shown below:

	Balance, July 01, 2020	Additions	Deductions	Balance, June 30, 2021	Amount Due in One Year
Mortgage note payable	\$ 4,527,549	\$ -	\$ 120,322	\$ 4,407,227	\$ 126,476

Mortgage Note

On June 30, 2016, Great Valley Academy assumed a mortgage note with the Bank of Stockton for \$4,900,000 for the purchase of property for its Salida school campus, which replaced the Manteca campus. The terms of the mortgage require interest-only payments through January 2017; thereafter, payments are \$29,870 per month. The interest rate is fixed at 5.25% with note maturity expected at July 2041.

At June 30, 2021, the total balance outstanding on the note was \$4,407,227. The amounts required to amortize the outstanding balance at June 30, 2021, are as follows:

Fiscal Year	Principal	Interest	Total
2021-22	\$ 126,476	\$ 231,964	\$ 358,440
2022-23	133,375	225,065	358,440
2023-24	140,049	218,391	358,440
2024-25	148,289	210,151	358,440
2025-26	156,378	202,062	358,440
2026-31	918,938	873,261	1,792,199
2031-36	1,198,301	593,899	1,792,200
2036-41	1,563,430	228,770	1,792,200
2041-42	21,991	130	22,121
Total	\$ 4,407,227	\$ 2,783,693	\$ 7,190,920

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 10 – LINE OF CREDIT

The School maintains an agreement with the Bank of Stockton for a line of credit in the amount of \$1,000,000. The line of credit is secured by the School's assets. As of June 30, 2021, there was no balance owed on the line of credit. The line of credit carries an interest rate of 7.0% and requires monthly payments when there are balances owed.

NOTE 11 – EMPLOYEE RETIREMENT PLANS

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. Certificated employees are members of the California State Teachers' Retirement System (CalSTRS), and eligible classified employees may contribute to the Great Valley Academy 401(k) Plan and Trust. The School is a participant in the plans and its contributions to CalSTRS do not exceed 5% of total plan-level contributions.

The details of each plan are as follows:

A. California State Teachers' Retirement System (CalSTRS)

Plan Description

The School contributes to the State Teachers Retirement Plan (STRP) administered by the California State Teachers' Retirement System (CalSTRS). STRP is a cost-sharing multiple-employer public employee retirement system defined benefit pension plan. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law.

A full description of the pension plan regarding benefit provisions, assumptions (for funding, but not accounting purposes), and membership information is listed in the June 30, 2019, annual actuarial valuation report, Defined Benefit Program Actuarial Valuation. This report and CalSTRS audited financial information are publicly available reports that can be found on the CalSTRS website under Publications at: <https://www.calstrs.com/general-information/gasb-6768>.

Benefits Provided

The STRP provides retirement, disability and survivor benefits to beneficiaries. Benefits are based on members' final compensation, age, and years of service credit. Members hired on or before December 31, 2012, with five years of credited service are eligible for the normal retirement benefit at age 60. Members hired on or after January 1, 2013, with five years of credited service are eligible for the normal retirement benefit at age 62. The normal retirement benefit is equal to 2.0% of final compensation for each year of credited service.

The School STRP is comprised of four programs: Defined Benefit Program, Defined Benefit Supplement Program, Cash Balance Benefit Program, and Replacement Benefits Program. The STRP holds assets for the exclusive purpose of providing benefits to members and beneficiaries of these programs. CalSTRS also uses plan assets to defray reasonable expenses of administering the STRP. Although CalSTRS is the administrator of the STRP, the State is the sponsor of the STRP and obligor of the trust. In addition, the State is both an employer and non-employer contributing entity to the STRP. The School contributes exclusively to the STRP Defined Benefit Program; thus, disclosures are not included for the other plans.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 11 – EMPLOYEE RETIREMENT PLANS (continued)

A. California State Teachers' Retirement System (CalSTRS) (continued)

Benefits Provided

The STRP provisions and benefits in effect at June 30, 2021, are summarized as follows:

	STRP Defined Benefit Program	
	On or before December 31, 2012	On or after January 1, 2013
Hire Date	2% at 60	2% at 62
Benefit Formula	5 years of service	5 years of service
Benefit Vesting Schedule	Monthly for life	Monthly for life
Benefit Payments	60	62
Retirement Age	2.0%-2.4%	2.0%-2.4%
Monthly Benefits as a Percentage of Eligible Compensation	10.25%	10.205%
Required Member Contribution Rate	16.15%	16.15%
Required Employer Contribution Rate	10.328%	10.328%
Required State Contribution Rate		

Contributions

Required member School and State of California contributions rates are set by the California Legislature and Governor and detailed in Teachers' Retirement Law. The contributions rates are expressed as a level percentage of payroll using the entry age normal actuarial method. In June 2019, California Senate Bill 90 (SB 90) was signed into law and appropriated approximately \$2.2 billion in fiscal year 2018–19 from the state's General Fund as contributions to CalSTRS on behalf of employers. The bill requires portions of the contribution to supplant the amounts remitted by employers such that the amounts remitted will be 1.03 and 0.70 percentage points less than the statutorily required amounts due for fiscal years 2019–20 and 2020–21, respectively. The remaining portion of the contribution, approximately \$1.6 billion, was allocated to reduce the employers' share of the unfunded actuarial obligation of the Defined Benefit Program.

The School's contributions to CalSTRS and required employer contribution rate for the last three fiscal years were as follows:

	Contribution	Required Contribution Rate
2020-21	\$ 492,324	16.15%
2019-20	\$ 471,366	17.10%
2018-19	\$ 416,581	16.28%

On-Behalf Payments

The State of California makes contributions to CalSTRS on behalf of the School. These payments consist of State General Fund contributions to CalSTRS pursuant to Sections 22954 and 22955.1 of the Education Code and Public Resources Code Section 6217.5. In addition, for the 2018-19 fiscal year, California Senate Bill No. 90 (SB 90) was signed into law on June 27, 2019, and appropriated supplemental contributions. Under accounting principles generally accepted in the United States of America, these amounts are reported as revenues and expenditures in the fund financial statements. The total amount recognized by the School for its proportionate share of the State's on-behalf contributions is \$80,135.

GREAT VALLEY ACADEMY - SALIDA

Notes to Financial Statements

June 30, 2021

NOTE 11 – EMPLOYEE RETIREMENT PLANS (continued)

B. 401(k) Plan

The School has established a 401K defined contribution retirement plan, whereby all eligible classified employees may elect to defer a portion of their salary into a separate retirement plan trust. Per the plan agreement, there is a requirement for the School to match employee salary elective deferrals up to 4%. For the year ending June 30, 2021, total employer contributions to the plan was \$36,188.

NOTE 12 – COMMITMENTS AND CONTINGENCIES

State and Federal Funds

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate expenditure disallowances under terms of the grants, it is believed that any required reimbursement will not be material.

NOTE 13 – JPA INFORMATION

The Great Valley Academy - Salida participates in a joint venture under a joint powers agreement (JPA) with Charter Safe. The School Safe JPA provides property and liability insurance and workers compensation coverage for its members. The JPA is governed by a board consisting of a representative from each member agency. The governing board controls the operations of the JPA independent of any influence by the member agencies beyond their representation on the governing board. Each member pays a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionately to its participation in the JPA.

Condensed unaudited financial information for Charter Safe for the year ended June 30, 2021, is as follows:

	Charter Safe
Total Assets	\$ 41,545,217
Total Liabilities	32,745,829
Net Assets	<u>\$ 8,799,388</u>
Total Revenues	\$ 35,024,544
Cost of Sales	(24,354,088)
Total Expenses	4,431,971
Net Income (Loss)	<u>\$ 6,238,485</u>

NOTE 14 – SUBSEQUENT EVENTS

Events subsequent to June 30, 2021, have been evaluated through November 17, 2021, the date at which the School's audited financial statements were available to be issued. No events requiring disclosures have occurred through this date.

Supplementary Information

GREAT VALLEY ACADEMY - SALIDA

Local Education Agency Organizational Structure

June 30, 2021

In 2016, Great Valley Academy - Salida (Charter No. 1819) was approved by the Salida Union Elementary School District and operates classroom-based instruction in kindergarten and grades 1-8. The School is located in Salida, which is in Stanislaus County, California.

BOARD OF DIRECTORS		
Member	Office	Term Expires
Steve Payne	President	June 2022
Yolanda Meraz	Vice President	June 2023
Susan Nisan	Secretary	June 2022
Twila Tosh	Salida Authorizing Agency Designee	August 2022
Vince Jamison	Board Member	June 2023
Chad Wolf	Board Member	June 2021

ADMINISTRATORS

Leah Silvestre Franklin,
Chief Executive Officer

Marisa Jacobson-Meeks,
Chief Operating Officer

Dr. Eldon Rosenow,
Founder

GREAT VALLEY ACADEMY - SALIDA*Schedule of Instructional Time**For the Fiscal Year Ended June 30, 2021*

Grade Level	Actual Number of Instructional Days	Number of Days from J-13A Waiver	Total	Status
Kindergarten	176	0	176	Complied
Grade 1	176	0	176	Complied
Grade 2	176	0	176	Complied
Grade 3	176	0	176	Complied
Grade 4	176	0	176	Complied
Grade 5	176	0	176	Complied
Grade 6	176	0	176	Complied
Grade 7	176	0	176	Complied
Grade 8	176	0	176	Complied

GREAT VALLEY ACADEMY - SALIDA*Reconciliation of Annual Financial and Budget Report with Audited Financial Statements
For the Fiscal Year Ended June 30, 2021*

June 30, 2021, annual financial and budget report net assets	\$ 7,242,283
Adjustments and reclassifications: Accounts payable	<u>51,170</u>
Net adjustments and reclassification	<u>51,170</u>
June 30, 2021, audited financial statement net assets	<u><u>\$ 7,293,453</u></u>

GREAT VALLEY ACADEMY - SALIDA

Note to the Supplementary Information

June 30, 2021

NOTE 1 – PURPOSE OF SCHEDULES

Schedule of Instructional Time

This schedule presents information on the number of instructional days offered by the School and whether the School complied with Article 8 (commencing with Section 46200) of Chapter 2 Part 26 of the *Education Code*.

Reconciliation of Annual Financial and Budget Report with Audited Financial Statements

This schedule provides the information necessary to reconcile the fund balance reported on the Unaudited Actual financial report to the audited financial statements.

Other Independent Auditors' Reports



**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL
REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN
AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE
WITH *GOVERNMENT AUDITING STANDARDS***

Board of Directors
Great Valley Academy - Salida
Modesto, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Great Valley Academy - Salida (a nonprofit organization), which comprise the statement of financial position as of June 30, 2021 and the related statement of activities, statement of functional expenses, and cash flows for the fiscal year then ended, and the related notes to the financial statements, and have issued our report thereon dated November 17, 2021.

Internal Control Over Financial Planning

In planning and performing our audit of the financial statements, we considered Great Valley Academy – Salida’s internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Great Valley Academy - Salida’s internal control. Accordingly, we do not express an opinion on the effectiveness of the Great Valley Academy - Salida’s internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. *A material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the School’s financial statements will not be prevented, or detected and corrected on a timely basis. *A significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

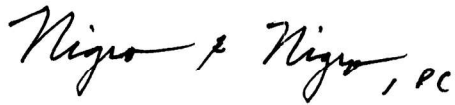
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Great Valley Academy - Salida's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instance(s) of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink that reads "Nigro & Nigro, PC". The signature is written in a cursive, flowing style.

Murrieta, California
November 17, 2021



INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE

Board of Directors
Great Valley Academy - Salida
Modesto, California

Report on State Compliance

We have audited Great Valley Academy - Salida's compliance with the types of compliance requirements described in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* that could have a direct and material effect on each of the Great Valley Academy's state government programs as noted on the following page for the fiscal year ended June 30, 2021.

Management's Responsibility

Management is responsible for compliance with state laws, regulations, and the terms and conditions of its State programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Great Valley Academy - Salida's state programs based on our audit of the types of compliance requirements referred to on the following page. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to on the following page that could have a direct and material effect on a state program occurred. An audit includes examining, on a test basis, evidence about Great Valley Academy - Salida's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each state program. However, our audit does not provide a legal determination of Great Valley Academy - Salida's compliance.

In connection with the audit referred to above, we selected and tested transactions and records to determine the School's compliance with the State laws and regulations applicable to the following items:

Description	Procedures Performed
Local Education Agencies Other Than Charter Schools (Applicable to Classroom-Based Charters in FY 2020/21)	
Attendance in Distance Learning	Yes
Instructional Time	Yes

Description	Procedures Performed
School Districts, County Offices of Education, and Charter Schools:	
California Clean Energy Jobs Act	Not Applicable
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Formula Pupil Counts	Yes
Independent Study - Course Based	Not Applicable
Charter Schools:	
Attendance	Yes
Mode of Instruction	Yes
Nonclassroom-Based Instruction/Independent Study	Not Applicable
Determination of Funding for Nonclassroom-Based Instruction	Not Applicable
Charter School Facility Grant Program	Not Applicable

Unmodified Opinion on Compliance with State Programs

In our opinion, Great Valley Academy - Salida complied, in all material respects, with the types of compliance requirements referred to above for the year ended June 30, 2021.

Nigro & Nigro, PC

Murrieta, California
November 17, 2021

Schedule of Findings and Recommendations

GREAT VALLEY ACADEMY - SALIDA

Summary of Auditors' Results

For the Fiscal Year Ended June 30, 2021

Financial Statements

Type of auditors' report issued	<u>Unmodified</u>
Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Noncompliance material to financial statements noted?	<u>No</u>

Federal Awards

Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Type of auditors' report issued on compliance for major programs:	<u>Unmodified</u>
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance, Section 200.516	<u>Yes</u>
Identification of major programs:	
<u>CFDA Numbers</u>	<u>Name of Program/ Cluster</u>
	<i>COVID - Coronavirus Relief Fund (CRF):</i>
<u>21.019</u>	<u>Learning Loss Mitigation</u>
	<i>Special Education- Local Assistance</i>
<u>84.027</u>	<u>Entitlement</u>

Dollar threshold used to distinguish between Type A and Type B Programs:	<u>\$ 750,000</u>
Auditee qualified as low-risk auditee?	<u>No</u>

State Awards

Type of auditors' report issued on compliance for state programs:	<u>Unmodified</u>
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GREAT VALLEY ACADEMY - SALIDA

Financial Statement Findings

For the Fiscal Year Ended June 30, 2021

This section identifies the significant deficiencies, material weaknesses, and instances of noncompliance related to the financial statements that are required to be reported in accordance with *Government Auditing Standards*. Pursuant to Assembly Bill (AB) 3627, all audit findings must be identified as one or more of the following categories:

Five Digit Code	AB 3627 Finding Types
10000	Attendance
20000	Inventory of Equipment
30000	Internal Control
40000	State Compliance
42000	Charter School Facilities Programs
43000	Apprenticeship: Related and Supplemental Instruction
50000	Federal Compliance
60000	Miscellaneous
61000	Classroom Teacher Salaries
62000	Local Control Accountability Plan
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

There were no financial statement findings in 2020-21.

GREAT VALLEY ACADEMY - SALIDA

Federal Award Findings and Recommendations

For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings required to be reported by the Uniform Guidance, Section 200.516 (e.g., significant deficiencies, material weaknesses, and instances of noncompliance, including questioned costs).

FINDING 2021-001: PROCUREMENT POLICY (50000)

CFDA #84.027 — U.S. Department of Education

Passed through Stanislaus County Office of Education

Special Education Cluster

Criteria: Non-Federal entities other than States, including those operating Federal programs as subrecipients of States, must follow the procurement standards set out at 2 CFR sections 200.318 through 200.326. They must use their own documented procurement procedures, which reflect applicable state and local laws and regulations, provided that the procurements conform to applicable Federal statutes and the procurement requirements identified in 2 CFR part 200.

Condition: The School's written procurement and purchasing procedures and board policies do not reflect the requirements identified in 2 CFR part 200.

Questioned Cost: N/A

Context: N/A

Effect: Lack of a specific Federal procurement written policy that conforms to all applicable Federal statutes and the procurement requirements could lead to a lack of control over procurement transactions.

Cause: The School was unaware of the requirement to maintain a documented policy that conforms to applicable Federal statutes and the procurement requirements.

Recommendation: We recommend that the School adopt a written policy which reflects applicable state, local, and Federal statutes and the procurement requirements identified in 2 CFR part 200. In addition, it is recommended that the School maintain a detailed administrative regulation or procedures manual addressing the mandated components.

Views of Responsible Officials: Board approved fiscal and procurement policy was in place for 2020-21 that met Federal requirements with the exception of vendor debarment verification and micro purchase threshold of \$10,000. GVA's policy stated \$15,000 for micro purchases. The Federal food program met the procurement and bid requirements as outlined by Federal policy which is the program with the largest amount of Federal revenue for GVA. All other Federal funds were not expended to the \$750,000 threshold and would not have triggered a single audit in 2020-21 but because the combination of all Federal funds exceeded \$750,000, the Federal procurement processes came under audit sooner than anticipated.

A revision to the current GVA fiscal and procurement policy with added Federal requirements will be board approved and implemented in 2021-22.

GREAT VALLEY ACADEMY - SALIDA
State Award Findings and Recommendations
For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings pertaining to noncompliance with state program rules and regulations.

There were no state award findings or recommendations in 2020-21.

GREAT VALLEY ACADEMY - SALIDA
Summary Schedule of Prior Audit Findings
For the Fiscal Year Ended June 30, 2021

There were no findings or responses in 2019-20.

GREAT VALLEY ACADEMY

Includes the Following Charter Schools:

**Great Valley Academy (Charter No. 0985); and
Great Valley Academy – Salida (Charter No. 1819)**

**FINANCIAL STATEMENTS AND
INDEPENDENT AUDITORS' REPORT**

**For the Fiscal Year Ended
June 30, 2021**

NIGRO & NIGRO^{PC}

GREAT VALLEY ACADEMY

For the Fiscal Year Ended June 30, 2021

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Financial Section



INDEPENDENT AUDITORS' REPORT

Board of Directors
Great Valley Academy
Modesto, California

Report on the Financial Statements

We have audited the accompanying combined financial statements of Great Valley Academy (a California nonprofit Organization) and its subsidiaries, which comprise the combined statement of financial position as of June 30, 2021, and the related combined statements of activities, cash flows, and functional expenses for the fiscal year then ended, and the related notes to the combined financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these combined financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of combined financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these combined financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the combined financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the combined financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the combined financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the combined financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of Great Valley Academy as of June 30, 2021, and the changes in its net assets and its cash flows for the fiscal year then ended in accordance with accounting principles generally accepted in the United States of America.

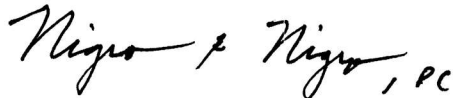
Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The supplementary information is presented for purposes of additional analysis and is not a required part of the financial statements. The schedule of expenditures of federal awards is presented for purposes of additional analysis as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, and is also not a required part of the financial statements. The supplementary information on pages 20 to 24 and the schedule of expenditures of federal awards on page 25 are the responsibility of management and were derived from and relate directly to the underlying accounting and other records used to prepare the financial statements. Such information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the basic financial statements as a whole. The information on page 19 has not been subjected to the auditing procedures applied in the audit of the financial statements and accordingly, we do not express an opinion or provide any assurance on it.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated November 17, 2021, on our consideration of the Great Valley Academy's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Charter's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Charter's internal control over financial reporting and compliance.

A handwritten signature in cursive script that reads "Nigro & Nigro, PC".

Murrieta, California
November 17, 2021

GREAT VALLEY ACADEMY
Combined Statement of Financial Position
June 30, 2021

ASSETS

Current Assets:

Cash	\$	6,255,781
Accounts receivable (Note 4)		3,504,124
Inventory		64,623
Other current assets		102,108
Total current assets		<u>9,926,636</u>

Non-current Assets:

Investments (Note 3)		1,032,907
Property and equipment (Note 6):		
Non-depreciable assets		2,070,000
Depreciable assets		13,051,386
Less accumulated depreciation		<u>(3,227,376)</u>
Total Property and equipment, net		<u>11,894,010</u>
Total non-current assets		<u>12,926,917</u>

Total Assets	\$	<u>22,853,553</u>
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LIABILITIES AND NET ASSETS

Liabilities

Current Liabilities:

Accounts payable	\$	520,868
Accrued payroll liabilities and benefits		254,233
Unearned revenues		64,755
Net deferred pay (See Note 7)		263,411
Mortgage payable, current portion (Note 8)		<u>271,660</u>
Total current liabilities		1,374,927

Non-current Liabilities:

Mortgage payable (Note 8)		<u>5,533,909</u>
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Total liabilities		<u>6,908,836</u>
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Net assets

Without donor restrictions		15,420,861
With donor restrictions (Note 9)		<u>523,856</u>
Total net assets		<u>15,944,717</u>

Total Liabilities and Net Assets	\$	<u>22,853,553</u>
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GREAT VALLEY ACADEMY
Combined Statement of Activities
For the Fiscal Year Ended June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
REVENUES AND OTHER SUPPORT			
LCFF apportionment	\$ 9,308,042	\$ -	\$ 9,308,042
Education Protection Account	3,057,570	-	3,057,570
In-lieu property tax transfers	2,868,587	-	2,868,587
Special education property tax transfers	-	276,393	276,393
Federal grants	-	966,533	966,533
Federal special education awards	-	241,045	241,045
Federal food program	-	655,655	655,655
State food program	-	139,293	139,293
Lottery	305,390	130,973	436,363
Other state sources	38,809	1,004,834	1,043,643
STRS on-behalf contribution	167,711	-	167,711
Local special education transfers	-	857,658	857,658
Other local revenues	156,863	15,514	172,377
Net assets released from restrictions	3,970,840	(3,970,840)	-
Total revenues and other support	19,873,812	317,058	20,190,870
EXPENSES			
Program Services:			
Instruction	10,874,228	-	10,874,228
Instruction-related services	1,929,903	-	1,929,903
Pupil services	1,706,396	-	1,706,396
Ancillary services	498,313	-	498,313
Depreciation	645,221	-	645,221
Total Program Services	15,654,061	-	15,654,061
Management and General:			
General administration	1,766,312	-	1,766,312
Plant services	1,098,079	-	1,098,079
Depreciation	4,747	-	4,747
Interest expense	322,070	-	322,070
Total management and general	3,191,208	-	3,191,208
Total expenses	18,845,269	-	18,845,269
Change in net assets from operations	1,028,543	317,058	1,345,601
OTHER GAINS/(LOSSES)			
Investment income	8,347	-	8,347
Total Other Gains/(Losses)	8,347	-	8,347
Change in net assets	1,036,890	317,058	1,353,948
NET ASSETS:			
Beginning of year	14,383,971	206,798	14,590,769
End of year	\$ 15,420,861	\$ 523,856	\$ 15,944,717

GREAT VALLEY ACADEMY
Combined Statement of Cash Flows
For the Fiscal Year Ended June 30, 2021

CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	\$ 1,353,948
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities:	
Depreciation expense	649,966
(Increase) decrease in operating assets:	
Accounts receivable	(913,252)
Inventory	(28,856)
Other current assets	(60,039)
Increase (decrease) in operating liabilities:	
Accounts payable	(434,926)
Accrued payroll liabilities	41,833
Unearned revenue	52,534
Net deferred pay	(3,411)
Net cash provided (used) by operating activities	<u>657,797</u>

CASH FLOWS FROM INVESTING ACTIVITIES

Purchase of equipment, furniture and building improvements	(107,113)
Acquisition of investments	<u>246,662</u>
Net cash provided (used) by investing activities	<u>139,549</u>

CASH FLOWS FROM FINANCING ACTIVITIES

Payments on Salida mortgage note	(120,322)
Payments on Modesto mortgage note	<u>(138,091)</u>
Net cash provided (used) by financing activities	<u>(258,413)</u>

Net increase (decrease) in cash	538,933
Cash:	
Beginning of year	<u>5,716,848</u>
End of year	<u>\$ 6,255,781</u>

SUPPLEMENTAL DISCLOSURE

Interest paid	<u>\$ 322,070</u>
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GREAT VALLEY ACADEMY*Combined Statement of Functional Expenses
For the Fiscal Year Ended June 30, 2021*

	Program Services	Management and General	Total
Salaries and Benefits			
Certificated salaries	\$ 6,921,035	\$ -	\$ 6,921,035
Classified salaries	2,269,229	1,235,812	3,505,041
Employee benefits	2,582,488	353,564	2,936,052
Total Salaries and Benefits	11,772,752	1,589,376	13,362,128
Supplies and Operating Expenses			
Books and supplies	1,979,233	202,219	2,181,452
Services and other operating expenses	1,256,857	1,072,796	2,329,653
Depreciation	645,219	4,747	649,966
Other outgo	-	322,070	322,070
Total Supplies and Operating Expenses	3,881,309	1,601,832	5,483,141
Totals	\$ 15,654,061	\$ 3,191,208	\$ 18,845,269

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. Nature of Activities

In February 2008, Great Valley Academy (the “Charter”) was approved to operate as a California charter school by the Stanislaus County Office of Education. The Charter was formed as an Internal Revenue Code (IRC) Section 501(c)(3) non-profit public benefit corporation. The Charter operated a school with a classroom based education program, offering education to students in kindergarten and grades 1-8. The Charter began its operations in 2008-09. In 2016-17, the Charter opened another school called Great Valley Academy-Salida. This new site was opened under the approval of the Salida Union Elementary School District and operated kindergarten and grades 1-8. The Modesto campus offers both classroom based and non-classroom based education programs, while the Salida campus offers all classroom based instruction. In addition, the Charter offers consulting services to other educational institutions, which is considered unrelated to the primary educational activity. Major sources of revenue for education come from federal and state agencies.

B. Basis of Presentation and Accounting

The Charter accounts for its financial transactions in accordance with the policies and procedures of the Department of Education’s *California School Accounting Manual*.

The financial statements of the Charter have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America. The financial statements are presented in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958 dated August 2016, and the provisions of the American Institute of Certified Public Accountants (AICPA) “Audit and Accounting Guide for Not-for-Profit Organizations” (the “Guide”). ASC 958-205 was effective January 1, 2018 and addresses general-purpose external financial statements appropriate for not-for-profit organizations.

Under the provisions of the ASC 958-205, net assets and revenues, and gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the Charter and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Charter. The Charter’s board may designate assets without restrictions for specific operational purposes from time to time.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met either by the actions of the not-for-profit organization to satisfy a particular purpose restriction, or by the passage of time. Some donor restrictions are perpetual (or permanent) in nature, whereby the donor has stipulated the funds be maintained in perpetuity, whereby the corpus of the donation must remain unspent.

C. Revenue and Revenue Recognition

Revenue is recognized when earned. Operating funds for the Charter are derived principally from state and federal sources. The Charter receives state funding based on each of the enrolled student’s average daily attendance (ADA) in its school. The Charter receives federal grants, which are paid through the California Department of Education or other state agencies. Revenues related to these federal grants are recognized when qualifying expenses have been incurred and when all other grant requirements have been met. Unrestricted support given by the state is recognized as revenue when received. Any such funds received in advance are deferred to the applicable period in which the related services are performed, or expenditures are incurred, respectively.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

C. Revenue and Revenue Recognition (continued)

Contributions are recognized when cash, securities or other assets, an unconditional promise to give, or notification of a beneficial interest is received. Conditional promises to give are not recognized until the conditions on which they depend have been substantially met.

D. Donated Materials and Supplies

Donated materials and supplies are recorded as contributions at their estimated fair market value at the date of donation if a value can be reasonably determined. Such donations are reported as increases in unrestricted net assets unless the donor has restricted the donated asset to a specific purpose.

E. Contributed Services

During the year ended June 30, 2021, the value of contributed services meeting the requirements for recognition in the financial statements was not material and has not been recorded. In addition, many individuals volunteer their time and perform a variety of tasks that assist the Charter, but these services do not meet the criteria for recognition as contributed services.

F. Estimates

The preparation of financial statements in conformity with generally accepted accounting principles required management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from estimates.

G. Income Taxes

The Charter is a non-profit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3) and California Revenue and Taxation Code Section 23701d. Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The Charter files information returns in the U.S. federal jurisdiction, and the state of California. The statute of limitations for federal and California state tax purposes is generally three and four years, respectively.

H. Cash and Cash Equivalents

The Charter considers certificates of deposit with a maturity date of 90 days or longer to be investments. At year-end and throughout the year, the Charter's cash balances were deposited in three financial institutions. As of June 30, 2021, the Charter held a portion of its reserves in checking, money market accounts, and certificates of deposit.

I. Custodial Credit Risk

The Charter maintains its cash at three financial institutions. Cash balances are insured up to \$250,000 by the Federal Deposit Insurance Corporation (FDIC) at each institution. At various times during the year, the amount on deposit with a single financial institution may exceed federal depository insurance limits and be exposed to custodial credit risk. As of June 30, 2021, the Charter had cash in the amount of \$5,756,368 which was exposed to this risk.

J. Investments

Investments are stated at fair value at the Statement of Financial Position date as required by FASB. Net realized and unrealized gains/losses on investments are presented on the Statement of Activities, with respect to any donor restrictions, as investment return. Investment return is presented net of related internal and external fees. The average cost method is used to determine the basis for computing realized gains/losses.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

K. Accounts Receivable

Accounts receivable consists mainly of grants and contract payments from other public agencies. No allowance for uncollectable amounts has been estimated as creditworthiness of payors and industry experience provide evidence to support amounts as fully collectible.

L. Prepaid Items

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items.

M. Property and Equipment

It is the Charter's policy to capitalize property and equipment over \$5,000. Purchased property and equipment are reported at historical cost or estimated historical cost. Contributed assets are recorded as contributions at their estimated fair value as of the date received. Such donations are reported as unrestricted contributions unless the donor has restricted the donated asset to a specific purpose or time of use. Additions, improvements, and other capital outlays that significantly extend the useful life of an asset are capitalized. Items that, as a whole, create an asset with a combined cost exceeding \$5,000 have also been capitalized. Other costs incurred for repairs and maintenance are expensed as incurred.

Depreciation on all assets is provided on the straight-line basis over the following estimated useful lives:

Description	Estimated Lives
Buildings and Improvements	15-50 years
Land Improvements	20 years
Equipment	5-10 years

N. Unearned Revenues

Unearned revenues represent payments received in advance for services that have not yet been performed or from cost-reimbursement grants for which expenses have not yet been incurred.

O. Fair Value Measurements

In accordance with fair value measurements, the Charter categorizes its assets and liabilities measured at fair value into a three-level hierarchy based on the priority of the inputs to the valuation technique used to determine fair value. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level 3). If the inputs used in the determination of the fair value measurement fall within different levels of the hierarchy, the categorization is based on the lowest level input that is significant to the fair value measurement.

Financial assets and liabilities recorded on the balance sheet are categorized based on the inputs to the valuation techniques as follows:

Level 1 – Inputs that reflect unadjusted quoted prices in active markets for identical investments, such as stocks, corporate and government bonds. The Charter has the ability to access the holding and quoted prices as of the measurement date.

Level 2 – Inputs, other than quoted prices, that are observable for the asset or liability either directly or indirectly, including inputs from markets that are not considered to be active.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

O. Fair Value Measurements (continued)

Level 3 – Inputs that are unobservable. Unobservable inputs reflect the Charter's own assumptions about the factors market participants would use in pricing an investment, and is based on the best information available in the circumstances.

P. Functional Allocation of Expenses

The financial statements report certain categories of expenses that are attributable to more than one program or supporting function, as shown in the Statement of Functional Expenses. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. Such allocations are determined by management on an equitable basis.

The expenses that are allocated include the following:

<u>Expense</u>	<u>Method of Allocation</u>
Salaries and benefits	Time and effort
Occupancy / rent	Facilities square footage
Insurance	Policy type and nature of coverage
Utilities	Facilities square footage
Supplies	Time and effort
Depreciation	Facilities square footage

NOTE 2 – LIQUIDITY

The Charter's financial assets available within one year of the Statement of Financial Position date for general expenditure are as follows:

Cash	\$	6,255,781
Accounts receivable		3,504,124
Other current assets		102,108
Total financial assets available within one year	\$	<u>9,862,013</u>

The Charter's policy for liquidity management requires that it structure its financial assets to be available as its general expenditures, liabilities and other obligations come due. Cash in excess of daily requirements is invested in short-term investments. In anticipation of future liquidity needs, the Charter has available a line of credit in the amount of \$1,000,000. At June 30, 2021, none of the balance was used.

GREAT VALLEY ACADEMY*Notes to the Combined Financial Statements**June 30, 2021***NOTE 3 – INVESTMENTS**

The fair values, related measurement input techniques and related maturities of the major type of investments held by the Charter at June 30, 2021, were as follows:

	Fair Value Input	Maturity (years)			Total
		Less than One	One to Five	Over Five	
Certificates of deposit	Level 1	\$ 516,674	\$ 260,111	\$ -	\$ 776,785
Money market funds	Level 1	256,122	-	-	256,122
Total		<u>\$ 772,796</u>	<u>\$ 260,111</u>	<u>\$ -</u>	<u>\$ 1,032,907</u>

Investment income consisted of the following for the year ended June 30, 2021:

Interest income	\$ 2,695
Dividends	5,261
Realized gains/(losses)	<u>391</u>
Total investment income	<u>\$ 8,347</u>

NOTE 4 – ACCOUNTS RECEIVABLE

Accounts receivable outstanding at June 30, 2021, consisted of the following:

Federal Government	
Special education entitlement	\$ 241,045
Title I	154,754
Food program	138,723
GEER	36,816
State Government	
LCFF	2,392,740
Lottery	115,013
Expanded learning opportunity- paraprofessional	52,932
In person instruction grant	24,473
Food program	13,524
Expanded learning opportunity	8,768
Local	
Special education	301,646
Other	<u>23,690</u>
Total	<u>\$ 3,504,124</u>

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 5 – INTERCOMPANY RECEIVABLE/PAYABLE

During the 2020-21 school year, the School received one check from the State for all student nutrition revenue. The funds are deposited into Modesto's bank account. The balance of \$58,607 at June 30, 2021 consists of student nutrition funds owed to Salida.

During the regular course of business, one campus will occasionally purchase items that are for both campuses. As of June 30, 2021 Salida owed \$1,909 to Modesto for shared purchases.

NOTE 6 – PROPERTY AND EQUIPMENT

Property and equipment as of June 30, 2021 consisted of the following:

	Balance, July 1, 2020	Additions	Retirements	Balance, June 30, 2021
Property & equipment not being depreciated:				
Land	\$ 2,070,000	\$ -	\$ -	\$ 2,070,000
Total property & equipment not being depreciated	<u>2,070,000</u>	<u>-</u>	<u>-</u>	<u>2,070,000</u>
Property & equipment being depreciated:				
Improvement of sites	6,023,762	95,602	-	6,119,364
Buildings	6,450,104	-	-	6,450,104
Equipment	470,407	11,511	-	481,918
Total property & equipment being depreciated	<u>12,944,273</u>	<u>107,113</u>	<u>-</u>	<u>13,051,386</u>
Accumulated depreciation for:				
Improvement of sites	(1,275,635)	(423,038)	-	(1,698,673)
Buildings	(1,102,363)	(175,525)	-	(1,277,888)
Equipment	(199,412)	(51,403)	-	(250,815)
Total accumulated depreciation	<u>(2,577,410)</u>	<u>(649,966)</u>	<u>-</u>	<u>(3,227,376)</u>
Total property & equipment being depreciated, net	<u>10,366,863</u>	<u>(542,853)</u>	<u>-</u>	<u>9,824,010</u>
Property & equipment, net of depreciation	<u>\$ 12,436,863</u>	<u>\$ (542,853)</u>	<u>\$ -</u>	<u>\$ 11,894,010</u>

Depreciation expense for the year ended June 30, 2021, is \$649,966.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 7 – NET DEFERRED PAY

The Charter provides elected certificated and classified employees who receive pay in the 11-month cycle the option to opt-in to deferred net pay plan. This allows elected employees to receive 12 paychecks during the year. The final check is not a payroll check, rather money that is withheld at 8.33% of net pay for all pay periods August 2019 through June 2020. As of June 30, 2021, the Charter had an obligation to pay deferred net pay of \$263,411, comprised of \$128,841 for Modesto and \$137,570 for Salida. Modesto acts as the trustee for Salida's net deferred pay. The obligation payable at June 30, 2021, is not recognized on Salida's Statement of Financial Position as it is satisfied by Modesto on Salida's behalf.

NOTE 8 – LONG TERM LIABILITIES

A schedule of changes in long-term liabilities for the year ended June 30, 2021, is shown below:

	Balance, July 1, 2020	Additions	Deductions	Balance, June 30, 2021	Amount Due in One Year
Mortgage note payable - Modesto	\$ 1,536,433	\$ -	\$ 138,091	\$ 1,398,342	\$ 145,184
Mortgage note payable - Salida	4,527,549	-	120,322	4,407,227	126,476
Totals	<u>\$ 6,063,982</u>	<u>\$ -</u>	<u>\$ 258,413</u>	<u>\$ 5,805,569</u>	<u>\$ 271,660</u>

A. Mortgage Note - Modesto

On May 14, 2010, Great Valley Academy completed the purchase of a building which it previously leased for its Modesto campus. The property was purchased for a price of \$3,250,000 from Modesto's Neighborhood Church. The agreement called for Great Valley Academy to carry a note payable to the Church in the amount of \$2,975,000. The terms of the note required monthly payments of \$17,512 beginning on June 14, 2010 and ending on May 14, 2015, including interest at a rate of 6.75%, and monthly payments of \$15,704 beginning on May 14, 2015 and ending on April 14, 2020, including interest at a rate of 8.0%.

On July 8, 2014, Great Valley Academy refinanced the mortgage note previously held with Modesto Neighborhood Church with the Bank of Stockton. The new mortgage note assumed is \$2,226,000 with monthly payments of \$17,672. The note matures on July 5, 2029 and bears a fixed rate of interest of 4.95%. At June 30, 2021, the total balance outstanding on the note was \$1,398,342. The amounts required to amortize the outstanding balance at June 30, 2021, are as follows:

Fiscal Year	Principal	Interest	Total
2021-22	\$ 145,184	\$ 66,878	\$ 212,062
2022-23	152,640	59,421	212,061
2023-24	160,341	51,720	212,061
2024-25	168,714	43,347	212,061
2025-26	177,379	34,682	212,061
2026-30	594,084	47,555	641,639
Total	<u>\$ 1,398,342</u>	<u>\$ 303,603</u>	<u>\$ 1,701,945</u>

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 8 – LONG TERM LIABILITIES (continued)

B. Mortgage Note - Salida

On June 30, 2016, Great Valley Academy assumed a mortgage note with the Bank of Stockton for \$4,900,000 for the purchase of property for its Salida school campus, which replaced the Manteca campus. The terms of the mortgage require interest-only payments through January, 2017; thereafter, payments are \$29,870 per month. The interest rate is 5.25% with note maturity expected at July, 2041. At June 30, 2021, the total balance outstanding on the note was \$4,407,227. The amounts required to amortize the outstanding balance at June 30, 2021, are as follows:

Fiscal Year	Principal	Interest	Total
2021-22	\$ 126,476	\$ 231,964	\$ 358,440
2022-23	133,375	225,065	358,440
2023-24	140,049	218,391	358,440
2024-25	148,289	210,151	358,440
2025-26	156,378	202,062	358,440
2026-31	918,938	873,261	1,792,199
2031-36	1,198,301	593,899	1,792,200
2036-41	1,563,430	228,770	1,792,200
2041-42	21,991	130	22,121
Total	<u>\$ 4,407,227</u>	<u>\$ 2,783,693</u>	<u>\$ 7,190,920</u>

NOTE 9 – NET ASSET CLASSIFICATION

Donor-restricted net assets at June 30, 2021 were comprised of the following amounts and restrictions:

Net assets with purpose restrictions:

Expanded learning opportunity	\$ 296,676
Expanded learning opportunity paraprofessional	105,765
Child nutrition	105,283
Lottery	6,930
SB 117 COVID-19	5,670
Prop 39 COVID grant	1,936
Classified professional development grant	1,596
Total	<u>\$ 523,856</u>

NOTE 10 – EMPLOYEE RETIREMENT PLANS

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. Certificated employees are members of the California State Teachers' Retirement System (CalSTRS), and eligible classified employees may contribute to the Great Valley Academy 401(k) Plan and Trust. The Charter is a participant in the plans and its contributions to CalSTRS do not exceed 5% of total plan-level contributions.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements *June 30, 2021*

NOTE 10 – EMPLOYEE RETIREMENT PLANS (continued)

The details of each plan are as follows:

A. California State Teachers' Retirement System (CalSTRS)

Plan Description

The Charter contributes to the State Teachers Retirement Plan (STRP) administered by the California State Teachers' Retirement System (CalSTRS). STRP is a cost-sharing multiple-employer public employee retirement system defined benefit pension plan. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law.

A full description of the pension plan regarding benefit provisions, assumptions (for funding, but not accounting purposes), and membership information is listed in the June 30, 2019, annual actuarial valuation report, Defined Benefit Program Actuarial Valuation. This report and CalSTRS audited financial information are publicly available reports that can be found on the CalSTRS website under Publications at: <https://www.calstrs.com/general-information/gasb-6768>.

Benefits Provided

The STRP provides retirement, disability and survivor benefits to beneficiaries. Benefits are based on members' final compensation, age, and years of service credit. Members hired on or before December 31, 2012, with five years of credited service are eligible for the normal retirement benefit at age 60. Members hired on or after January 1, 2013, with five years of credited service are eligible for the normal retirement benefit at age 62. The normal retirement benefit is equal to 2.0% of final compensation for each year of credited service.

The Charter STRP is comprised of four programs: Defined Benefit Program, Defined Benefit Supplement Program, Cash Balance Benefit Program, and Replacement Benefits Program. The STRP holds assets for the exclusive purpose of providing benefits to members and beneficiaries of these programs. CalSTRS also uses plan assets to defray reasonable expenses of administering the STRP. Although CalSTRS is the administrator of the STRP, the State is the sponsor of the STRP and obligor of the trust. In addition, the State is both an employer and non-employer contributing entity to the STRP. The Charter contributes exclusively to the STRP Defined Benefit Program; thus, disclosures are not included for the other plans.

The STRP provisions and benefits in effect at June 30, 2021, are summarized as follows:

	STRP Defined Benefit Program	
	On or before December 31, 2012	On or after January 1, 2013
Hire Date	December 31, 2012	January 1, 2013
Benefit Formula	2% at 60	2% at 62
Benefit Vesting Schedule	5 years of service	5 years of service
Benefit Payments	Monthly for life	Monthly for life
Retirement Age	60	62
Monthly Benefits as a Percentage of Eligible Compensation	2.0%-2.4%	2.0%-2.4%
Required Member Contribution Rate	10.25%	10.205%
Required Employer Contribution Rate	16.15%	16.15%
Required State Contribution Rate	10.328%	10.328%

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 10 – EMPLOYEE RETIREMENT PLANS

A. California State Teachers' Retirement System (CalSTRS) (continued)

Contributions

Required member School and State of California contributions rates are set by the California Legislature and Governor and detailed in Teachers' Retirement Law. The contributions rates are expressed as a level percentage of payroll using the entry age normal actuarial method. In June 2019, California Senate Bill 90 (SB 90) was signed into law and appropriated approximately \$2.2 billion in fiscal year 2018–19 from the state's General Fund as contributions to CalSTRS on behalf of employers. The bill requires portions of the contribution to supplant the amounts remitted by employers such that the amounts remitted will be 1.03 and 0.70 percentage points less than the statutorily required amounts due for fiscal years 2019–20 and 2020–21, respectively. The remaining portion of the contribution, approximately \$1.6 billion, was allocated to reduce the employers' share of the unfunded actuarial obligation of the Defined Benefit Program.

The Charter's contributions to CalSTRS and required employer contribution rate for the last three fiscal years were as follows:

	Contribution			Required Contribution Rate
	Modesto		Combined	
2020-21	\$ 546,316	\$ 492,324	\$ 1,038,640	16.15%
2019-20	\$ 510,554	\$ 471,366	\$ 981,920	17.10%
2018-19	\$ 461,298	\$ 416,581	\$ 877,879	16.28%

On-Behalf Payments

The State of California makes contributions to CalSTRS on behalf of the Charter. These payments consist of State General Fund contributions to CalSTRS pursuant to Sections 22954 and 22955.1 of the Education Code and Public Resources Code Section 6217.5. In addition, for the 2018-19 fiscal year, California Senate Bill No. 90 (SB 90) was signed into law on June 27, 2019, and appropriated supplemental contributions. Under accounting principles generally accepted in the United States of America, these amounts are reported as revenues and expenditures in the fund financial statements. The total amount recognized by the Charter for its proportionate share of the State's on-behalf contributions is \$167,711.

B. 401(K) Plan

The Charter has established a 401K defined contribution retirement plan, whereby all eligible classified employees may elect to defer a portion of their salary into a separate retirement plan trust. Per the plan agreement, there is a requirement for the Charter to match employee salary elective deferrals up to 4.0%. For the year ending June 30, 2021, total employer contributions to the plan were \$78,728.

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 11 – OPERATING LEASES

The Charter has entered into various operating leases for the use of office space and office equipment.

A. Facility Operating Leases

In August 2015, the Great Valley Academy – Modesto entered into an operating lease agreement with Tully Manor Investments, LLC for office space for its homeschool program, located in Modesto, CA. Payments are required monthly and initial base rental fee was \$1,979 per month. In May 2020, the Charter entered into a new agreement to renew its lease at a base rental fee of \$5,589.60 per month. The lease is set to expire on June 30, 2025.

In December 2018, Great Valley Academy – Modesto entered into an operating lease agreement with Tully Manor Investments, LLC for a second office space for its homeschool program, located in Modesto, CA. Payments are required monthly and the initial base rental fee is \$1,297 per month for a 22-month term.

Future minimum payments due on the facilities operating leases are:

Fiscal Year	Payments
2021-22	\$ 67,075
2022-23	67,075
2023-24	67,075
2024-25	67,075
Total	<u>\$ 268,300</u>

B. Office Equipment Operating Leases

In October 2018, Great Valley Academy – Modesto entered into an operating lease agreement with CIT Bank, N.A. for additional office equipment for its main campus, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$396 per month for a term of 48-months.

In August 2019, Great Valley Academy – Modesto entered into an operating lease agreement with Wells Fargo bank for additional office equipment for its main campus, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$266 per month for a term of 60 months.

In November 2020, Great Valley Academy – Modesto entered into an operating lease agreement with U.S. Bank for office equipment for its homeschool program, located in Modesto, CA. Payments are required monthly and initial base rental fee is \$533 per month for a term of 60-months.

Future minimum payments due on the facilities operating leases are:

Fiscal Year	Principal
2021-22	\$ 14,338
2022-23	10,777
2023-24	9,590
2024-25	6,926
2025-26	2,664
Total	<u>\$ 44,295</u>

GREAT VALLEY ACADEMY

Notes to the Combined Financial Statements

June 30, 2021

NOTE 12 – LINE OF CREDIT

The Charter maintains an agreement with the Bank of Stockton for a line of credit in the amount of \$1,000,000. The line of credit is secured by the Charter's assets. As of June 30, 2021, there was no balance owed on the line of credit. The line of credit carries an interest rate of 7.0% and requires monthly payments when balances are owed.

NOTE 13 – COMMITMENTS AND CONTINGENCIES

State and Federal Funds

The Charter has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate expenditure disallowances under terms of the grants, it is believed that any required reimbursement will not be material.

NOTE 14 – JPA INFORMATION

The Great Valley Academy participates in a joint venture under a joint powers agreement (JPA) with Charter Safe. The Charter Safe JPA provides property and liability insurance and workers compensation coverage for its members. The JPA is governed by a board consisting of a representative from each member agency. The governing board controls the operations of the JPA independent of any influence by the member agencies beyond their representation on the governing board. Each member pays a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionately to its participation in the JPA.

Condensed unaudited financial information for Charter Safe for the year ended June 30, 2021, is as follows:

	Charter Safe
Total Assets	\$ 41,545,217
Total Liabilities	32,745,829
Net Assets	<u>\$ 8,799,388</u>
Total Revenues	\$ 35,024,544
Cost of Sales	(24,354,088)
Total Expenses	<u>4,431,971</u>
Net Income (Loss)	<u>\$ 6,238,485</u>

NOTE 15 – SUBSEQUENT EVENTS

Events subsequent to June 30, 2021 have been evaluated through November 17, 2021, the date at which the Charter's audited combined financial statements were available to be issued.

Supplementary Information

GREAT VALLEY ACADEMY

Local Education Agency Organizational Structure

June 30, 2021

Great Valley Academy is comprised of two charters in Modesto and Salida.

The Great Valley Academy - Modesto (Charter No. 0985) was authorized as a California charter school in February 2008 by the Stanislaus County Office of Education. The Charter provides classroom and non-classroom-based instruction to students in kindergarten and grades 1-8, and is located in Modesto, California.

In 2016, Great Valley Academy – Salida (Charter No. 1819) was approved by the Salida Union Elementary School District and operates classroom-based instruction in kindergarten and grades 1-8. The Charter is located in Salida, which is in Stanislaus County, California.

BOARD OF DIRECTORS		
Member	Office	Term Expires
Steve Payne	President	June 2022
Yolanda Meraz	Vice President	June 2023
Susan Nisan	Secretary	June 2022
Twila Tosh	Salida Authorizing Agency Designee	August 2022
Vince Jamison	Board Member	June 2023
Chad Wolf	Board Member	June 2021

ADMINISTRATORS

Leah Silvestre Franklin,
Chief Executive Officer

Marisa Jacobson-Meeks,
Chief Operating Officer

Dr. Eldon Rosenow,
Founder

GREAT VALLEY ACADEMY
Combining Statement of Financial Position
June 30, 2021

	Great Valley Academy - Modesto	Great Valley Academy - Salida	Eliminating	Totals
ASSETS				
Current Assets:				
Cash	\$ 4,329,175	\$ 1,926,606	\$ -	\$ 6,255,781
Accounts receivable	954,010	2,550,114	-	3,504,124
Intercompany receivable	1,909	58,607	(60,516)	-
Inventory	64,623	-	-	64,623
Other current assets	95,038	7,070	-	102,108
Total current assets	<u>5,444,755</u>	<u>4,542,397</u>	<u>(60,516)</u>	<u>9,926,636</u>
Non-current Assets:				
Investments	1,032,907	-	-	1,032,907
Property and equipment:				
Non-depreciable assets	1,120,000	950,000	-	2,070,000
Depreciable assets	5,059,151	7,992,235	-	13,051,386
Less accumulated depreciation	<u>(1,857,930)</u>	<u>(1,369,446)</u>	<u>-</u>	<u>(3,227,376)</u>
Total property and equipment, net	<u>4,321,221</u>	<u>7,572,789</u>	<u>-</u>	<u>11,894,010</u>
Total non-current assets	<u>5,354,128</u>	<u>7,572,789</u>	<u>-</u>	<u>12,926,917</u>
Total Assets	<u>\$ 10,798,883</u>	<u>\$ 12,115,186</u>	<u>\$ (60,516)</u>	<u>\$ 22,853,553</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Current Liabilities:				
Accounts payable	\$ 212,143	\$ 308,725	\$ -	\$ 520,868
Accrued payroll liabilities and benefits	162,750	91,483	-	254,233
Intercompany payable	58,607	1,909	(60,516)	-
Unearned revenues	52,366	12,389	-	64,755
Net deferred pay	263,411	-	-	263,411
Mortgage payable, current portion	145,184	126,476	-	271,660
Total current liabilities	<u>894,461</u>	<u>540,982</u>	<u>(60,516)</u>	<u>1,374,927</u>
Non-current Liabilities:				
Mortgage payable	1,253,158	4,280,751	-	5,533,909
Total non-current liabilities	<u>1,253,158</u>	<u>4,280,751</u>	<u>-</u>	<u>5,533,909</u>
Total liabilities	<u>2,147,619</u>	<u>4,821,733</u>	<u>(60,516)</u>	<u>6,908,836</u>
Net assets				
Without donor restrictions	8,372,051	7,048,810	-	15,420,861
With donor restrictions	279,213	244,643	-	523,856
Total net assets	<u>8,651,264</u>	<u>7,293,453</u>	<u>-</u>	<u>15,944,717</u>
Total Liabilities and Net Assets	<u>\$ 10,798,883</u>	<u>\$ 12,115,186</u>	<u>\$ (60,516)</u>	<u>\$ 22,853,553</u>

GREAT VALLEY ACADEMY
Combining Statement of Activities
For the Fiscal Year Ended June 30, 2021

	Great Valley Academy - Modesto	Great Valley Academy - Salida	Totals
REVENUES AND OTHER SUPPORT			
LCFF apportionment	\$ 3,245,985	\$ 6,062,057	\$ 9,308,042
Education Protection Account	2,887,386	170,184	3,057,570
In-lieu property tax transfers	1,693,330	1,175,257	2,868,587
Special education property tax transfers	141,021	135,372	276,393
Federal grants	552,852	413,681	966,533
Federal special education awards	139,866	101,179	241,045
Federal food program	377,918	277,737	655,655
State food program	79,758	59,535	139,293
Lottery	222,546	213,817	436,363
Other state sources	501,269	542,374	1,043,643
STRS on-behalf contribution	87,576	80,135	167,711
Local special education transfers	437,594	420,064	857,658
Other local revenues	126,482	45,895	172,377
Total revenues and other support	10,493,583	9,697,287	20,190,870
EXPENSES			
Certificated salaries	3,635,347	3,285,688	6,921,035
Classified salaries	1,935,498	1,569,543	3,505,041
Employee benefits	1,534,762	1,401,290	2,936,052
Books and supplies	1,218,148	963,304	2,181,452
Services and other operating expenses	1,172,746	1,156,907	2,329,653
Depreciation	273,768	376,198	649,966
Other outgo	65,076	256,994	322,070
Total expenses	9,835,345	9,009,924	18,845,269
Change in net assets from operations	658,238	687,363	1,345,601
OTHER GAINS/(LOSSES)			
Investment income	6,940	1,407	8,347
Total other gains/(losses)	6,940	1,407	8,347
Change in net assets	665,178	688,770	1,353,948
NET ASSETS:			
Beginning of year	7,986,086	6,604,683	14,590,769
End of year	\$ 8,651,264	\$ 7,293,453	\$ 15,944,717

GREAT VALLEY ACADEMY
Combining Statement of Cash Flows
For the Fiscal Year Ended June 30, 2021

	Great Valley Academy - Modesto	Great Valley Academy - Salida	Totals
CASH FLOWS FROM OPERATING ACTIVITIES			
Change in net assets	\$ 665,178	\$ 688,770	\$ 1,353,948
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities:			
Depreciation expense	273,768	376,198	649,966
(Increase) decrease in operating assets:			
Accounts receivable	695,106	(1,608,358)	(913,252)
Intercompany receivable	22,001	(58,607)	(36,606)
Inventory	(28,856)	-	(28,856)
Other current assets	(66,210)	6,171	(60,039)
Increase (decrease) in operating liabilities:			
Accounts payable	(479,916)	44,990	(434,926)
Accrued payroll liabilities	22,824	19,009	41,833
Intercompany payable	58,607	(22,001)	36,606
Unearned revenue	46,302	6,232	52,534
Net deferred pay	(3,411)	-	(3,411)
Net cash provided (used) by operating activities	<u>1,205,393</u>	<u>(547,596)</u>	<u>657,797</u>
CASH FLOWS FROM INVESTING ACTIVITIES			
Purchase of equipment, furniture and building improvements	(54,200)	(52,913)	(107,113)
Acquisition of investments	<u>246,662</u>	<u>-</u>	<u>246,662</u>
Net cash provided (used) by investing activities	<u>192,462</u>	<u>(52,913)</u>	<u>139,549</u>
CASH FLOWS FROM FINANCING ACTIVITIES			
Payments on Salida mortgage note	-	(120,322)	(120,322)
Payment on Modesto mortgage note	<u>(138,091)</u>	<u>-</u>	<u>(138,091)</u>
Net cash provided (used) by financing activities	<u>(138,091)</u>	<u>(120,322)</u>	<u>(258,413)</u>
Net increase (decrease) in cash	1,259,764	(720,831)	538,933
Cash:			
Beginning of year	<u>3,069,411</u>	<u>2,647,437</u>	<u>5,716,848</u>
End of year	<u>\$ 4,329,175</u>	<u>\$ 1,926,606</u>	<u>\$ 6,255,781</u>
SUPPLEMENTAL DISCLOSURE			
Interest paid	<u>\$ 65,076</u>	<u>\$ 256,994</u>	<u>\$ 322,070</u>

GREAT VALLEY ACADEMY
Schedule of Instructional Time
For the Fiscal Year Ended June 30, 2021

GREAT VALLEY ACADEMY - MODESTO

Grade Level	Actual Number of Instructional Days	Number of Days from J-13A Waiver	Total	Status
Kindergarten	176	0	176	Complied
Grade 1	176	0	176	Complied
Grade 2	176	0	176	Complied
Grade 3	176	0	176	Complied
Grade 4	176	0	176	Complied
Grade 5	176	0	176	Complied
Grade 6	176	0	176	Complied
Grade 7	176	0	176	Complied
Grade 8	176	0	176	Complied

GREAT VALLEY ACADEMY - SALIDA

Grade Level	Actual Number of Instructional Days	Number of Days from J-13A Waiver	Total	Status
Kindergarten	176	0	176	Complied
Grade 1	176	0	176	Complied
Grade 2	176	0	176	Complied
Grade 3	176	0	176	Complied
Grade 4	176	0	176	Complied
Grade 5	176	0	176	Complied
Grade 6	176	0	176	Complied
Grade 7	176	0	176	Complied
Grade 8	176	0	176	Complied

GREAT VALLEY ACADEMY*Reconciliation of Annual Financial and Budget Report with Audited Financial Statements
For the Fiscal Year Ended June 30, 2021*

June 30, 2021, annual financial and budget report	
net assets	\$ 15,891,947
Adjustments and reclassifications:	
Accounts payable- Modesto	1,600
Accounts payable- Salida	<u>51,170</u>
Net adjustments and reclassification	<u>52,770</u>
June 30, 2021, audited financial statement net assets	<u><u>\$ 15,944,717</u></u>

GREAT VALLEY ACADEMY*Schedule of Expenditures of Federal Awards
For the Fiscal Year Ended June 30, 2021*

Federal Grantor/ Pass-through Grantor/ Program Cluster Title	Federal CFDA Number	Pass-Through Entity Identifying Number	Cluster Expenditures	Federal Expenditures
U.S. Department of Agriculture:				
Passed through California Dept. of Education (CDE):				
Child Nutrition Cluster:				
School Breakfast Program - Especially Needy	10.553	13526	\$ 285,096	
National School Lunch Program	10.555	13523	370,559	
Total Child Nutrition Cluster				<u>\$ 655,655</u>
U.S. Department of Treasury:				
Passed through California Dept. of Education (CDE):				
COVID - Coronavirus Relief Fund (CRF): Learning Loss Mitigation	21.019	25516		<u>607,013</u>
U.S. Department of Education:				
Passed through California Dept. of Education (CDE):				
Every Student Succeeds Act (ESSA):				
Title I, Part A, Basic Grants Low-Income and Neglected	84.010	14329		206,717
Passed through County SELPA:				
Special Education- Local Assistance Entitlement	84.027	13379		241,045
Education Stabilization Cluster :				
Elementary and Secondary School Emergency Relief (ESSER II) Fund	84.425D	15547	35,567	
Governor's Emergency Education Relief (GEER) Fund	84.425C	15517	54,641	
Total Education Stabilization Cluster				<u>90,208</u>
Total U.S. Department of Education				<u>537,970</u>
Total Expenditures of Federal Awards				<u>\$ 1,800,638</u>

Of the Federal awards presented in this schedule, the School provided no awards to subrecipients.

GREAT VALLEY ACADEMY

Note to the Supplementary Information

June 30, 2021

NOTE 1 – PURPOSE OF SCHEDULES

Combined Statements of Financial Position, Activities, and Cash Flows

These statements present separate financial activity of both charter schools as of and for the fiscal year ended June 30, 2021.

Schedule of Instructional Time

This schedule presents information on the number of instructional days offered by the Charter and whether the Charter complied with Article 8 (commencing with Section 46200) of Chapter 2 Part 26 of the *Education Code*.

Reconciliation of Annual Financial and Budget Report with Audited Financial Statements

This schedule provides the information necessary to reconcile the fund balance reported on the Unaudited Actual financial report to the audited financial statements.

Schedule of Expenditures of Federal Awards

The schedule of expenditures of Federal awards includes the Federal grant activity of the School and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of the financial statements. The School did not elect to use the ten percent de minimis indirect cost rate.

The following schedule provides a reconciliation between revenues reported on the Statement of Activities and the related expenditures reported on the Schedule of Expenditures of Federal Awards. The reconciling amounts represent Federal funds that have been expended as of June 30, 2021 and revenue recognized as of June 30, 2021.

	<u>CFDA Number</u>	<u>Amount</u>
Total Federal Revenues from the Statement of Activities		\$ 1,863,233
Differences between Federal Revenues and Expenditures:		
COVID - Coronavirus Relief Fund (CRF): Learning Loss Mitigation	21.019	<u>(62,595)</u>
Total Schedule of Expenditures of Federal Awards		<u>\$ 1,800,638</u>

Other Independent Auditors' Reports



**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL
REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN
AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE
WITH *GOVERNMENT AUDITING STANDARDS***

Board of Directors
Great Valley Academy
Modesto, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the combined financial statements of Great Valley Academy (a nonprofit organization), which comprise the combined statement of financial position as of June 30, 2021 and the related combined statements of activities, and cash flows for the fiscal year then ended, and the related notes to the combined financial statements, and have issued our report thereon dated November 17, 2021.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered Great Valley Academy's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Great Valley Academy's internal control. Accordingly, we do not express an opinion on the effectiveness of the Great Valley Academy's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. *A material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Charter's financial statements will not be prevented, or detected and corrected on a timely basis. *A significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

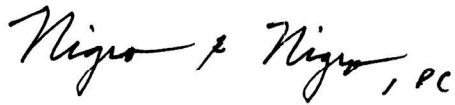
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Great Valley Academy's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Charter's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Charter's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink that reads "Nigro & Nigro, PC". The signature is written in a cursive, flowing style.

Murrieta, California
November 17, 2021



**INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR
EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL
OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE**

Board of Directors
Great Valley Academy
Modesto, California

Report on Compliance for Each Major Federal Program

We have audited Great Valley Academy's (a nonprofit organization) compliance with the types of compliance requirements described in the OMB *Compliance Supplement* that could have a direct and material effect on each of Great Valley Academy's major federal programs for the year ended June 30, 2021. Great Valley Academy's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Great Valley Academy's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Great Valley Academy's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Great Valley Academy's compliance.

Opinion on Each Major Federal Program

In our opinion, Great Valley Academy complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

Other Matters

The results of our auditing procedures disclosed an instance of noncompliance, which is required to be reported in accordance with the Uniform Guidance and which is described in the accompanying schedule of findings and questioned costs as Finding 2021-001. Our opinion on each major federal program is not modified with respect to this matter.

Great Valley Academy's response to the noncompliance finding identified in our audit is described in the accompanying schedule of findings and questioned costs. Great Valley Academy's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

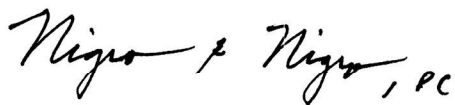
Report on Internal Control Over Compliance

Management of Great Valley Academy is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Great Valley Academy's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Academy's internal control over compliance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that have not been identified. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, we identified a certain deficiency in internal control over compliance, as described in the accompanying schedule of findings and questioned costs as Finding 2021-001 that we consider to be a significant deficiency.

Great Valley Academy's response to the internal control over compliance finding identified in our audit is described in the accompanying schedule of findings and questioned costs. Great Valley Academy's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



Murrieta, California
November 17, 2021



INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE

Board of Directors
Great Valley Academy
Modesto, California

Report on State Compliance

We have audited Great Valley Academy's compliance with the types of compliance requirements described in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* that could have a direct and material effect on each of the Great Valley Academy's state government programs as noted on the following page for the fiscal year ended June 30, 2021.

Management's Responsibility

Management is responsible for compliance with state laws, regulations, and the terms and conditions of its State programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Great Valley Academy's state programs based on our audit of the types of compliance requirements referred to on the following page. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to on the following page that could have a direct and material effect on a state program occurred. An audit includes examining, on a test basis, evidence about Great Valley Academy's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each state program. However, our audit does not provide a legal determination of Great Valley Academy's compliance.

In connection with the audit referred to above, we selected and tested transactions and records to determine the Charter's compliance with the State laws and regulations applicable to the following items:

Description	Procedures Performed
Local Educational Agencies Other Than Charter Schools (Applicable to Classroom-Based Charters in FY 2020/2021)	
Attendance and Distance Learning	Yes
Instructional Time	Yes

Jeff Nigro, CPA, CFE | Elizabeth Nigro, CPA | Shannon Bishop, CPA | Peter Glenn, CPA, CFE | Paul J. Kaymark, CPA

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Description	Procedures Performed
School Districts, County Offices of Education, and Charter School	
California Clean Energy Jobs Act	Not Applicable
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Formula Pupil Counts	Yes
Independent Study – Course Based	Not Applicable
Charter Schools:	
Attendance	Yes
Mode of Instruction	Yes
Nonclassroom-Based Instruction/Independent Study	Not Applicable
Determination of Funding for Nonclassroom-Based Instruction	Not Applicable
Charter School Facility Grant Program	Not Applicable

Unmodified Opinion on Compliance with State Programs

In our opinion, Great Valley Academy complied, in all material respects, with the types of compliance requirements referred to above for the year ended June 30, 2021.

Nigro & Nigro, PC

Murrieta, California
November 17, 2021

Schedule of Findings and Recommendations

GREAT VALLEY ACADEMY

Summary of Auditors' Results

For the Fiscal Year Ended June 30, 2021

Financial Statements

Type of auditors' report issued	<u>Unmodified</u>
Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Noncompliance material to financial statements noted?	<u>No</u>

Federal Awards

Internal control over financial reporting:	
Material weakness(es) identified?	<u>No</u>
Significant deficiency(s) identified not considered to be material weaknesses?	<u>None reported</u>
Type of auditors' report issued on compliance for major programs:	<u>Unmodified</u>
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance, Section 200.516	<u>Yes</u>
Identification of major programs:	
CFDA Numbers	<u>Name of Program/ Cluster</u>
21.019	<u>COVID - Coronavirus Relief Fund (CRF):</u>
	<u>Learning Loss Mitigation</u>
84.027	<u>Special Education- Local Assistance</u>
	<u>Entitlement</u>

Dollar threshold used to distinguish between Type A and Type B Programs:	<u>\$ 750,000</u>
Auditee qualified as low-risk auditee?	<u>No</u>

State Awards

Type of auditors' report issued on compliance for state programs:	<u>Unmodified</u>
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GREAT VALLEY ACADEMY

Financial Statement Findings

For the Fiscal Year Ended June 30, 2021

This section identifies the significant deficiencies, material weaknesses, and instances of noncompliance related to the financial statements that are required to be reported in accordance with *Government Auditing Standards*. Pursuant to Assembly Bill (AB) 3627, all audit findings must be identified as one or more of the following categories:

Five Digit Code	AB 3627 Finding Types
10000	Attendance
20000	Inventory of Equipment
30000	Internal Control
40000	State Compliance
42000	Charter School Facilities Programs
43000	Apprenticeship: Related and Supplemental Instruction
50000	Federal Compliance
60000	Miscellaneous
61000	Classroom Teacher Salaries
62000	Local Control Accountability Plan
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

There were no financial statement findings in 2020-21.

GREAT VALLEY ACADEMY

Federal Award Findings and Recommendations For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings required to be reported by the Uniform Guidance, Section 200.516 (e.g., significant deficiencies, material weaknesses, and instances of noncompliance, including questioned costs).

FINDING 2021-001: PROCUREMENT POLICY (50000)

CFDA #84.027 — U.S. Department of Education Passed through Stanislaus County Office of Education Special Education Cluster

Criteria: Non-Federal entities other than States, including those operating Federal programs as subrecipients of States, must follow the procurement standards set out at 2 CFR sections 200.318 through 200.326. They must use their own documented procurement procedures, which reflect applicable state and local laws and regulations, provided that the procurements conform to applicable Federal statutes and the procurement requirements identified in 2 CFR part 200.

Condition: The School's written procurement and purchasing procedures and board policies do not reflect the requirements identified in 2 CFR part 200.

Questioned Cost: N/A

Context: N/A

Effect: Lack of a specific Federal procurement written policy that conforms to all applicable Federal statutes and the procurement requirements could lead to a lack of control over procurement transactions.

Cause: The School was unaware of the requirement to maintain a documented policy that conforms to applicable Federal statutes and the procurement requirements.

Recommendation: We recommend that the School adopt a written policy which reflects applicable state, local, and Federal statutes and the procurement requirements identified in 2 CFR part 200. In addition, it is recommended that the School maintain a detailed administrative regulation or procedures manual addressing the mandated components.

Views of Responsible Officials: Board approved fiscal and procurement policy was in place for 2020-21 that met Federal requirements with the exception of vendor debarment verification and micro purchase threshold of \$10,000. GVA's policy stated \$15,000 for micro purchases. The Federal food program met the procurement and bid requirements as outlined by Federal policy which is the program with the largest amount of Federal revenue for GVA. All other Federal funds were not expended to the \$750,000 threshold and would not have triggered a single audit in 2020-21 but because the combination of all Federal funds exceeded \$750,000, the Federal procurement processes came under audit sooner than anticipated.

A revision to the current GVA fiscal and procurement policy with added Federal requirements will be board approved and implemented in 2021-22.

GREAT VALLEY ACADEMY

State Award Findings and Recommendations For the Fiscal Year Ended June 30, 2021

This section identifies the audit findings pertaining to noncompliance with state program rules and regulations.

There were no state award findings or recommendations in 2020-21.

GREAT VALLEY ACADEMY

*Summary Schedule of Prior Audit Findings
For the Fiscal Year Ended June 30, 2021*

There were no findings or responses in 2019-20.



**Great Valley Academy-Modesto
Educator Effectiveness Local Plan
For the 2021-2022 through 2025-2026 Fiscal Years**

Background

On July 9, 2021, Governor Newsom approved AB130, the Education Trailer Bill which provides funds to county offices of education, school districts, charter schools, and state special schools to provide professional learning.

These expenditures may take place over fiscal years 2021–22, 2022–23, 2023–24, 2024–25, and 2025–26. LEAs may use these allocated funds to provide professional learning for teachers, administrators, paraprofessionals, and classified staff that interact with pupils in order to promote educator equity, quality, and effectiveness. This funding is provided specifically to support these activities:

- ☐ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.
- ☐ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- ☐ Practices and strategies that reengage pupils and lead to accelerated learning.
- ☐ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ☐ Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a school site's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.

- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- ❑ Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- ❑ New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of AB130 section 22 subdivision (c).
- ❑ Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- ❑ Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

The funds must be spent by June 30, 2026. As a condition of receiving the funds, a spending plan for the funds must be presented at a public meeting of the governing board and then approved at a subsequent public meeting of the governing board. What follows is the proposed spending plan for the Educator Effectiveness funding that we will be receiving.

Funding

The estimated amount of one-time funds to be received for this purpose is \$251,726

Uses

- ❑ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.
- ❑ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.
- ❑ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs. Instruction and education to support implementing effective language acquisition programs for English learners.



**Great Valley Academy-Salida
Educator Effectiveness Local Plan
For the 2021-2022 through 2025-2026 Fiscal Years**

Background

On July 9, 2021, Governor Newsom approved AB130, the Education Trailer Bill which provides funds to county offices of education, school districts, charter schools, and state special schools to provide professional learning.

These expenditures may take place over fiscal years 2021–22, 2022–23, 2023–24, 2024–25, and 2025–26. LEAs may use these allocated funds to provide professional learning for teachers, administrators, paraprofessionals, and classified staff that interact with pupils in order to promote educator equity, quality, and effectiveness. This funding is provided specifically to support these activities:

- ☐ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.
- ☐ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- ☐ Practices and strategies that reengage pupils and lead to accelerated learning.
- ☐ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ☐ Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a school site's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.

- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- ❑ Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- ❑ New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of AB130 section 22 subdivision (c).
- ❑ Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- ❑ Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

The funds must be spent by June 30, 2026. As a condition of receiving the funds, a spending plan for the funds must be presented at a public meeting of the governing board and then approved at a subsequent public meeting of the governing board. What follows is the proposed spending plan for the Educator Effectiveness funding that we will be receiving.

Funding

The estimated amount of one-time funds to be received for this purpose is \$218,436

Uses

- ❑ Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.
- ❑ Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.
- ❑ Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- ❑ Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs. Instruction and education to support implementing effective language acquisition programs for English learners.

Modesto
Budget Comparison
2021-2022 Approved Budget (June 2021)
2021-2022 Proposed Budget (November 2021)

	2021-2022 Approved Operating Budget Jun-21	2021-2022 Proposed Operating Budget Nov-21	\$ Variance	% Variance
Ordinary Income/Expense				
Income				
8000 · LCFF, EPA, In Lieu, Prop tax	8,290,756	7,389,647	-901,109	-10.9%
8100 · Federal Revenue	1,300,605	1,125,113	-175,493	-13.5%
8500 · Other State Revenues	630,743	925,768	295,025	46.8%
8600 · Other Local Revenue	458,500	270,000	-188,500	-41.1%
8700 · SpEd Apportionment	463,040	463,040	0	0.0%
Total Income	11,143,644	10,173,567	-970,077	-8.7%
Gross Profit	11,143,644	10,173,567	-970,077	-8.7%
Expense				
1000 · Certificated Salaries	3,906,294	3,827,292	-79,002	-2.0%
2000 · Classified Salaries	2,231,245	2,351,476	120,231	5.4%
3000 · Employee Benefits	1,705,219	1,787,678	82,459	4.8%
4000 · Books & Supplies	1,100,130	962,630	-137,500	-12.5%
5000 · Services & Other Operating Exp	1,740,136	1,365,124	-375,011	-21.6%
6000 · Capital Outlay	78,000	60,700	-17,300	-22.2%
7000 · All Other Financing Uses	247,379	262,379	15,000	6.1%
Total Expense	11,008,402	10,617,280	-391,122	-3.6%
Net Ordinary Income	135,241	-443,713	-578,954	-428.1%
	1.21%	-4.36%		
Restricted Reserve		\$147,914	7425 ELOG received in 20/21 for use in 21/22	
		\$54,338	7426 ELOG received in 20/21 for use in 21/22	
		<u>\$202,252</u>	Total	
		-241,460.88	Reduction in reserves	
		-2.37%		

Great Valley Academy-Modesto Campus
Budget Comparison-Narrative
Nov-21

Revenue

8000 - Revenue figures updated with most recent LCFF 22.2a calculations - Includes ADA reduction
8100 - Decrease of Federal Revenue per SELPA, Food Program, Title I, ESSER II and ESSER III - portions moved to 22/23
8500 - Increase of State Revenue ELOP, Ed Eff & SELPA - ELOG revenue received in 20/21
8600 - Decreased revenue to fundraisers and Kids' Care fees
8700 - No change

Net decrease in revenue \$970,077 (-8.7%)

Expenses

Salaries and benefit expenses include:

Additional Instructional Aides and Summer School salary expense
and all allocations for multi-campus staff salaries/benefits
Employee benefits include STRS increase
Salaries and benefits represent 75.03% of total expenses

Books and Supplies expenses include:

curriculum
teacher/classroom/office/medical/custodial/maintenance supplies
furniture/computers/equipment
ELO, IPI, ESSER II & III and Title I expenses

Services and other expense estimates include:

decreased professional development
new teacher induction - 14 teachers
audit/legal/insurance/SpEd subcontracts/nursing
authorizer oversight fees
ELO, IPI, ESSER II & III and Title I expenses
new mental health services

Capital Outlay

\$60K for miscellaneous projects
** at year end, capital outlay amounts will be reclassified as a construction/fixed asset
thereby providing an increase to "income"/increase in fund reserve

Othr Tuition, Exc csts, Deficit

21/22 represents estimated SELPA calculation from section C.2.d

All other financing uses

Includes mortgage payment including principal and interest
** at year end, principal amounts will be reclassified as a reduction to liabilities
thereby providing an increase to "income"/increase in fund reserve

"Income"/increase in fund reserve amount

-\$443,713.00 Net Ordinary Income

Salida
Budget Comparison
2021-2022 Approved Budget (June 2021)
2021-2022 Proposed Budget (November 2021)

	2021-2022 Approved Operating Budget Jun-21	2021-2022 Proposed Operating Budget Nov-21	\$ Variance	% Variance
Ordinary Income/Expense				
Income				
8000 · LCFF, EPA, In Lieu, Prop tax	7,646,195	7,166,539	-479,656	-6.3%
8100 · Federal Revenue	974,454	933,703	-40,751	-4.2%
8500 · Other State Revenues	598,889	792,166	193,277	32.3%
8600 · Other Local Revenue	327,500	210,000	-117,500	-35.9%
8700 · SpEd Apportionment	428,411	428,411	0	0.0%
Total Income	9,975,449	9,530,819	-444,630	-4.5%
Gross Profit	9,975,449	9,530,819	-444,630	-4.5%
Expense				
1000 · Certificated Salaries	3,663,528	3,651,126	-12,401	-0.3%
2000 · Classified Salaries	1,843,431	1,872,664	29,233	1.6%
3000 · Employee Benefits	1,601,402	1,631,386	29,983	1.9%
4000 · Books & Supplies	967,595	854,095	-113,500	-11.7%
5000 · Services & Other Operating Exp	1,269,118	1,283,335	14,218	1.1%
6000 · Capital Outlay	78,000	98,000	20,000	25.6%
7000 · All Other Financing Uses	393,912	393,912	0	0.0%
Total Expense	9,816,985	9,784,518	-32,467	-0.3%
Net Ordinary Income	158,464	-253,699	-412,163	-260.1%
	1.59%	-2.66%		

Restricted Reserve	\$148,762	7425 ELOG received in 20/21 for use in 21/22
	\$51,427	7426 ELOG received in 20/21 for use in 21/22
	\$200,189	Total
	-53,509.84 Reduction in reserves	
	-0.56%	

Great Valley Academy-Salida Campus
Budget Comparison-Narrative
Nov-21

Revenue

8000 - Revenue figures updated with most recent LCFF 22.2a calculations - Includes ADA reduction
8100 - Decrease of Federal Revenue per SELPA, Food Program, Title I, ESSER II and ESSER III - portions moved to 22/23
8500 - Increase of State Revenue ELOP, Ed Eff & SELPA - ELOG revenue received in 20/21
8600 - Decreased revenue to fundraisers and Kids' Care fees
8700 - No change

Net decrease in revenue \$444,630 (-4.5%)

Expenses

Salaries and benefit expenses include:

Additional Instructional Aides and Summer School salary expense
and all allocations for multi-campus staff salaries/benefits
Employee benefits include STRS increase
Salaries and benefits represent 73.12% of total expenses

Books and Supplies expenses include:

curriculum
teacher/classroom/office/medical/custodial/maintenance supplies
furniture/computers/equipment
ELO, IPI, ESSER II & III and Title I expenses

Services and other expense estimates include:

decreased professional development
new teacher induction - 13 teachers
audit/legal/insurance/SpEd subcontracts/nursing
authorizer oversight fees
ELO, IPI, ESSER II & III and Title I expenses
new mental health services

Capital Outlay

\$53K for miscellaneous projects \$45K for paving
** at year end, capital outlay amounts will be reclassified as a construction/fixed asset
thereby providing an increase to "income/increase in fund reserve

Othr Tuition, Exc csts, Deficit

21/22 represents estimated SELPA calculation from section C.2.d

All other financing uses

Includes mortgage payment including principal and interest
** at year end, principal amounts will be reclassified as a reduction to liabilities
thereby providing an increase to "income"/increase in fund reserve

"Income"/increase in fund reserve amount

-\$253,699.00 Net Ordinary Income



COVID Safety Plan (CSP)

Updated November 17, 2021
GREAT VALLEY ACADEMIES
3200 Tully Road, Modesto CA 95350



Great Valley Academy Charter Schools

Number of schools: 2

Total Enrollment: 1,630

Great Valley Academy-Modesto
3200 Tully Road
Modesto, CA 95355

Great Valley Academy-Salida
5901 Sisk Road
Modesto, CA 95356

Superintendent (or equivalent) Name: Leah Silvestre Franklin
3200 Tully Road
Modesto, CA
95350

Phone Number: (209)576-2283
Email: l.silvestre@greatvalleyacademy.com

Cleaning and Disinfection

Great Valley Academies provides the following related to cleaning and ventilation/air flow:

- All classroom, office and shared spaces are cleaned nightly
- Includes desks, chairs, tables, hard surfaces, high touchpoints
- Disinfectant spray, towels and gloves are available in every classroom, and high use areas
- Bathrooms are disinfected nightly
- Playground equipment is disinfected nightly
- Water fountains are closed; water filling stations are used, with disposable cups available to students without water bottles
- HVAC filters are all MERV 11 and are changed bi-monthly
- HVAC units are equipped with Bipolar Ionization Air Purifiers
- Doors and windows will be left open for improved air flow, as practicable

Entrance, Egress and Movement Within the School

- Volunteers and visitors are suspended (with the exception of service providers) to be reinstated early 2022 (dependent on local case rates)
- Student drop off and pick up is staff supervised; parents remain in vehicle, students escorted in/out of the vehicle and directed to classrooms/vehicle
- Parents arriving on campus for student drop off or pick up (outside of drop off/pickup process), must wear face a covering

Face Coverings and Other Essential Protective Gear

GVA follows the California Department of Public Health's (CDPH) face covering guidelines:

Age	Face Covering Requirement
under 2 years old	No
2 years old – 12 th grade	Yes

- Students are provided a face covering if needed
- All staff are required to wear a face covering unless they are instructing students in a way their mouth needs to be visible (speech, special education, English learner support, younger students), in which case, they may wear a face shield with drape (addressed on a case by case basis)
- Following CDPH guidance, students who are not exempt from wearing a face covering and choose not to wear one will be referred to an independent study program
- Students that are certified medically exempt are required to wear a shield with drape
- Face coverings can be removed for eating, drinking and outdoor activities
- Staff handling or serving food must wear gloves in addition to face covering

Healthy Hygiene Practices

- Signage is prominently displayed at school sites reminding individuals of proper hygiene protocols
- Hand sanitizer is available upon entry to school campuses
- Each classroom and common area has access to hand sanitizer
- Routines are established in support of frequent handwashing
- Handwashing or use of hand sanitizer will occur
 - upon entry to any instructional area
 - before and after eating
 - before and after recess
 - before and after PE activity
- Additional handwashing stations have been added at multiple strategic locations on each campus
- Restrooms are stocked with soap and paper towels, supplies will be checked and refilled nightly and during the school day

Health Screenings for Students and Staff

- GVA Staff and students are directed to complete self-screening prior to arriving on campus
- GVA staff and students are directed to stay home and see a health care provider if they experience any flu like symptoms
- Get tested for COVID when symptoms are compatible
- Students exhibiting symptoms are immediately sent to the office where they will be screened and will remain in a sick room until they can be picked up
- Sick room is disinfected after each use
- Staff exhibiting symptoms are sent home
- If student or staff is confirmed with a positive test result, GVA will work with Stanislaus County Public Health department and will communicate as appropriate with school community

Recommendations for staying home when sick

- Getting tested for COVID-19 when symptoms are consistent with COVID-19 will help with rapid contact tracing and prevent possible spread at school
- **Employees and Students** with symptoms of COVID-19 infection cannot return for in-person instruction until they have met CDPH criteria to return to school for those with symptoms:
 - At least 24 hours have passed since resolution of fever without the use of fever-reducing medications; **and**

- Other symptoms have improved; **and**
- They have a negative test for SARS-CoV-2 **OR** a healthcare provider has provided documentation that the symptoms are typical of their underlying chronic condition (e.g., allergies or asthma) **OR** a healthcare provider has confirmed an alternative named diagnosis (e.g., Streptococcal pharyngitis, Coxsackie virus), **OR** at least 10 days have passed since symptom onset.

Quarantine guidelines

- Fully Vaccinated Close Contact
 - Refrain from quarantine and testing following a known exposure if asymptomatic
 - Following a known exposure at work, fully vaccinated workers do not need to quarantine if asymptomatic
 - If symptomatic, quarantine for 10 days is required and testing is recommended
- When both parties were wearing a mask in the indoor classroom setting, unvaccinated students who are close contacts (more than 15 minutes over a 24-hour period within 0-6 feet indoors) may undergo a modified 10-day quarantine as follows. They may continue to attend school for in-person instruction if they:
 - Are asymptomatic; **and**
 - Continue to appropriately mask, as required; **and**
 - Undergo at least twice weekly testing during the 10-day quarantine; **and**
 - Continue to quarantine for all extracurricular activities at school, including sports, and activities within the community setting
- Unvaccinated close contacts who were not wearing masks or for whom the infected individual was not wearing a mask during the indoor exposure
 - For these contacts, those who remain asymptomatic, meaning they have NOT had any symptoms, may discontinue self-quarantine under the following conditions:
- Quarantine can end after Day 10 from the date of last exposure without testing; **OR**
- Quarantine can end after Day 7 if testing occurs **on or** after Day 5 from the date of last exposure and tests negative
 - To discontinue quarantine before 14 days following last known exposure, asymptomatic close contacts must:
- Continue daily self-monitoring for symptoms through Day 14 from last known exposure; **and**
- Follow all recommended non-pharmaceutical interventions (e.g., wearing a mask when around others, hand washing, avoiding crowds) through Day 14 from last known exposure

- If any symptoms develop during this 14-day period, the exposed person must:
 - o immediately isolate
 - o get tested
 - o contact their healthcare provider
- Students that are quarantined can request a short term independent study from their teacher
- Household exposures to COVID 19 cases may require extended quarantine and isolation periods up to a total of 20 days
- Unvaccinated students and staff will be required to quarantine for a full 7 days after international travel and must test on the 7th day in order to return to school. If no test, a full 10 day quarantine is required

Testing of Students and Staff

- GVA students exhibiting symptoms are immediately sent to the office where they are screened and remain in a sick room until they can be picked up, GVA then refers them to COVID 19 testing per CDPH guidelines. Receiving a negative test result is the fastest path to return to class.
- GVA staff have access to self-testing supplies and can access when recommended or needed for unvaccinated or vaccinated employees.
- Unvaccinated GVA staff will also undergo weekly COVID surveillance testing provided by GVA

Exclusion of COVID-19 Cases-Employees

Where we have a COVID-19 case in our workplace, we will limit transmission by:

- Ensuring that COVID-19 cases are excluded from the workplace until our return- to- work requirements are met
- Excluding employees with COVID-19 exposure from the workplace for up to 14 days after the last known exposure to a COVID-19 case if unvaccinated. Vaccinated employees may remain in the workplace if exposed and not showing symptoms
- Continuing and maintaining an employee's earnings, seniority, and all other employee rights and benefits whenever we've demonstrated that the COVID-19 exposure is work related; this will be accomplished by offering time off/leave options
- Providing employees with information on available benefits at the time of exclusion

Return to Work Criteria

COVID-19 cases with COVID-19 symptoms will not return to work until all the following have occurred:

- Up to 24 hours have passed since a fever of 100.4 or higher have resolved without the use of fever-reducing medications; **and**
- COVID 19 symptoms have improved; **and**
- At least 10 days have passed since COVID-19 symptoms first appeared
- COVID-19 cases who tested positive and never developed COVID-19 symptoms will not return to work until a minimum of 10 days have passed since the date of specimen collection of their first positive COVID-19 test
- A negative COVID-19 test will not be required for an employee to return to work
- If an order to isolate or quarantine an employee is issued by a local or state health official, the employee will not return to work until the period of isolation or quarantine is completed or the order is lifted; if no period was specified, the period will be up to 14 days from the time the order to quarantine was effective
- Exceptions to the above requirements:
 - Employees that are fully vaccinated
 - Employees who have returned to work after COVID -19 positive within 90 days of most recent exposure
- Vaccinated and unvaccinated employees may have different COVID protocol guidelines as outlined by CalOsha

Identification and Tracing of Contacts

- GVA works in consultation with the Stanislaus County Public Health Department on topics including but not limited to tracing contacts of confirmed positive cases and provision of communication with those contacts as appropriate
- GVA participates in Shared Portal for Outbreak Tracking (SPOT) a local & statewide system which tracks absenteeism, positive cases and exposures.
- GVA conducts contact tracing and communication with those who were in close personal contact (CPC) with someone who has tested positive
- CDPH defines close personal contact as a person who is 0-6 feet from someone testing positive for more than 15 minutes over a 24 hour period
- GVA confidentially tracks both staff and student positive cases, data to include (not limited to) positivity determination date, return to campus date, and other relevant details
- GVA confidentially tracks both staff and student close personal contacts (CPC), related follow up and status
- Designated staff contact information provided to the Stanislaus County Public Health Department

- Chief Executive Officer, Leah Silvestre Franklin
- Chief Operating Officer, Marisa Meeks
- GVA follows the CDPH guidelines for measures to be taken when student or staff member have symptoms, is a CPC of someone who has the virus or tests positive with the virus

Staff Training and Family Education

- All staff are trained on cleaning protocols, face covering requirements, COVID 19 response, staff testing availability, hygiene practices, student illness protocol, student screening and visitor/volunteer suspension
- Families continue to receive ParentSquare communication regarding safety plans and ongoing updates
- In coordination with the Stanislaus County Public Health Officer, affected stakeholders will be notified via Email and ParentSquare regarding potential virus exposure

Reporting, Recordkeeping, and Access

It is our policy to:

- Report information about COVID-19 cases at our workplace to the local health department, and provide any related information requested by the local health department
- Report immediately to Cal/OSHA any COVID-19-related serious illnesses or death, as defined under CCR Title 8 section 330(h), of an employee occurring in our place of employment or in connection with any employment
- Maintain records of the steps taken to implement our COVID-19 Prevention Protocol
- Make our COVID-19 Prevention Protocol available to employees, and to representatives of Cal/OSHA upon request
- Use GVA database to keep a record of and track all COVID-19 cases; information may be made available as required by law, with personal identifying information removed

Communication Plans

- GVA communicates with Stanislaus County Public Health any positive case information received
- In coordination with the Stanislaus County Public Health Officer, GVA uses our Email, and ParentSquare posts to communicate with affected stakeholders of potential virus exposure. This communication will be consistent with legal counsel guidance regarding the Family Educational Rights and Privacy Act.
- GVA Chief Executive Officer, Chief Operating Officer or Human Resources representative communicate directly with affected staff members

GREAT VALLEY ACADEMY
Regular Meeting of the Board of Trustees
-Monday January 31, 2022 5:30 p.m.-
-Via Zoom-

The Board of Directors ("Board") and employees of Great Valley academy shall meet via Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at

<https://us02web.zoom.us/j/82363692272?pwd=NHIUQTFR0dYTnMwWXdlOVRDZVBGUT09>

You may also call in using the Zoom phone number +1 669 900 6833 US Meeting ID 82363692272. Members of the public who wish to comment during the Board meeting may email in comments to publiccomment@greatvalleyacademy.com and they will be read during the public participation segment of the meeting. Comments must be received by 12:00 p.m. on the day of the meeting. Members of the public calling in will be given the opportunity to address the Board during the public participation segment of the meeting. Individual comments will be limited to three (3) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Access to Board Materials: You may request a copy of the written materials submitted to the Board by sending a request to publiccomment@greatvalleyacademy.com.

Disability Access: A copy for disability-related modifications or accommodations to participate in this public meeting should be made at least 24 hours prior to the meeting by emailing publiccomment@greatvalleyacademy.com. Efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

AGENDA

a. CALL TO ORDER

b. Board findings pursuant to Government Code Section 54953(e)

The Charter School Board of Directors determines, in accordance with Government Code Section 54953(e)(1)(B), that meeting in person would present imminent risks to the health or safety of attendees. Pursuant to Government Code Section 54953(e)(3), the Board has also reconsidered the circumstances of the State of Emergency declared by the Governor on March 4, 2020, and finds the State of Emergency continues to directly impact the ability of the Directors to meet safely in person and/or that State or local officials continue to impose or recommend measures to promote social distancing.

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

c. COMMUNICATIONS

i. Letter to GVA Board

- a. PUBLIC PARTICIPATION**
- b. MODESTO PRINCIPAL REPORT**
- c. SALIDA PRINCIPAL REPORT**
- d. HOMESCHOOL PRINCIPAL REPORT**
- e. CHIEF OPERATING OFFICER'S REPORT**
- f. CHIEF EXECUTIVE OFFICER'S REPORT**
- g. FOUNDER'S REPORT**

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the minutes of the Regular Board Meeting of November 29, 2021**

f. ACTION ITEMS

- a. Approval of Updated Modesto 2021-2022 Academic Calendar**
- b. Approval of Updated Salida 2021-2022 Academic Calendar**
- c. Approval of Updated 2021-2022 GVA Classified Holiday Schedule**
- d. Approval of Form 990's**
- e. Approval of revised Covid Safety Plan**
- f. Approval of 401(k) Formal Record of Action**

g. INFORMATION AND DISCUSSION

- a. Monthly Financials**

h. FUTURE AGENDA ITEMS

- a. FUTURE REGULAR BOARD MEETINGS – Monday February 28, 2022
~ 5:30 p.m. via Zoom**

i. FINAL ADJOURNMENT

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Dear Great Valley Academy Board,

Pleased see my listed concerns/questions below:

Parent Evolvment:

I'm strongly recommend that GVA open up parent involvement on campus. Parents need to be allowed to attend in-person conferences, activities, site council meetings, and more. Parents are an essential part of the teacher/parent/child team. Also, please help me understand, if parents can now attend a board meeting, why are parents not allowed for parent involvement on campus? I've never seen or been in my child's classrooms at GVA, which concerns me and my husband deeply. When do you anticipate that GVA will open up for parent involvement?

20-21 School year:

My daughter went to school 30 times in-person for her Kindergarten year. She continues to struggle in various areas due to the decision to only allow kinder on campus one day a week. She missed out on valuable academics and social/ emotional activities due to being forced to stay home and receive two 30 min Zoom lessons a day. This was a disservice to students. What is GVA's plans of offering summer sessions for those that were forced to stay home?

Summer school:

I strongly recommend that 2022 summer school planning needs to start for students who had gaps from missing valuable in-person education due to GVA's board decision of not allowing students on campus until Oct 26. Kindergarten was allowed on campus only one day a week for 4 hours. Again, what is GVA's plans of offering summer school for those students that were forced to stay home and only had 4 hours of classroom time a week?

Covid Plan:

GVA board needs to reflect and revise their Covid plan. The current quarantine plan due to exposure is keeping students out of the classroom for 10-20 days. This is not the same as other districts in the area. This is causing students to loss more education and continuing to create learning gaps. There was an update to the State's plan for quarantine/ exposure and I have not seen any changes reflected to GVA's plan. What is the delay and/or why has GVA not made any changes?

Covid Vaccination:

We do not want our 6-year-old to be forced to be vaccinated in the new school year. This should be a family decision not enforced by the school. I am requesting that GVA stand up against this mandate.

Enrollment:

I forecast that GVA will continue to loss enrollment due to the decisions that are being made that have shown to not have the best interest in mind for their student – very concerning.

In closing, charter schools are supposed to be creative in their approach at education. This is the reason I had chosen GVA for my child. I believe and have faith that the GVA Board will be able to revise plans and have a new approach to do what's best for students and families moving forward. I hope my questions will be addressed at the next board meeting. Thank you for your time and consideration.

Respectfully,
Nolan & Shannda Ortiz

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Nov. 18-Jan. 21

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	86	77.66	84.76	78.197	87.49
1	74	67.187	87.76	68.60	88.42
2	83	74.50	87.94	77.10	90.28
3	94	83.97	86.15	87.11	90.03
4	93	82.78	88.44	84.52	90.27
5	76	67.66	84.59	69.79	88.70
6	91	82.50	86.68	83.80	88.72
7	101	91.56	88.24	94.78	90.97
8	75	67.06	88.89	70.72	92.05
Total	773	694.88	87.06	714.64	89.69

2. Key Accomplishments:

Clubs

40 Book Challenge (31 students have meet 40 books)

Live Broadcast of Assemblies- student run

Spirit Days- Favorite Things Day

Pajama Drive- over 340 pajamas collected

Lockdown Drill

Continued Yearlong SCOE Math Trainings, RAMP Assessment Alignment/Review

Continued Yearlong SCOE Science Trainings, Grade Level Planning Sessions

Site Safety Initiative/Multi Campus/Urban Readiness Group

TOPS Safety Kits purchased

Staff Dance

Culminating Events (Rube Goldberg)

3. Upcoming Key Events/Activities:

Teacher In Service Day- Feb. 14

NWEA Testing - Ends Feb. 11

Spirit Day-Sports Day

Lion Dance Performance
Outdoor Classroom Upgrade
Enrollment Meetings- In Person and Zoom
In Person- Staff Meetings
SCOE Math Walks
Book Bags for K-3 students

Great Valley Academy Salida

Charter School Monthly Summary Report

January 31, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Jan ADA 01/04-01/24 YTD ADA 08/10-01/24

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA %
K	82	67.71	82.23	74.13	88.44
1	97	78.71	79.60	89.32	88.72
2	90	77.29	85.15	82.55	89.33
3	100	82.21	80.42	90.90	89.41
4	88	68.21	76.78	79.94	89.51
5	91	76.57	83.51	86.41	89.23
6	90	76.50	82.14	84.70	90.76
7	81	62.64	76.80	72.57	89.36
8	81	65.21	80.51	72.84	88.66
Total	800	655.07	80.83	733.35	89.28

2. Key Accomplishments:

- a. January 3rd: Teacher in-service day
- b. January 4th: Part time librarian hired to move library project forward
- c. January 7th: Site safety training
- d. January 7th: ELPAC scores released:

State:	Salida:
4: 14%	10%
3: 34%	66%
2: 32%	22%
1: 20%	2%
- e. January 27th: Site Leadership
- f. NWEA testing throughout the month
- g. Ongoing: SCOE science and math training

3. Upcoming Key Events/Activities:

- a. February is open enrollment month!
- b. February 4th: Spirit Day – Team Colors
- c. February 14th: Teacher in-service – Site safety
- d. February 21st: No school – Presidents Day
- e. February 25th: End of trimester 2

Great Valley Academy Homeschool

Charter School Monthly Summary Report

January 31, 2022

Reporting Dates: 11/8/2021-12/17/2021

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	8	7.6	100	7	100
1	10	9.8	100	9.4	97.64
2	8	6.7	100	6.1	100
3	2	2	100	2	100
4	10	9.6	100	9.8	99.87
5	5	4	100	3.5	100
6	8	7.6	100	6.2	95.6
7	8	6.5	97.12	5.5	98.7
8	8	7.8	97.59	7.3	99.02
Total	67	61.9	99.38	57.2	98.83

2. Key Accomplishments:

- December 3rd-- Assignment Work Record 4 Due
- December 3rd, 10th, 17th, January 7th, 14th, 21st, 28th --GVS Staff Training with Dr. Rosenow
- December 7th -- Homeschool Parent Orientation
- December 10th --Lexia Core5 Staff Training
- December 15th—Annual Winter Reception
- January 4th—Homeschool Parent Orientation
- January 7th—Lexia PowerUp Staff Training
- January 12—NWEA Winter Testing began
- January 13th—Spring Enrichment begins
- January 14th—Assignment Work Record 5 Due
- January 27th—Enrichment Spirit Day - Pajama Day

3. Upcoming Key Events/Activities:

- February 1st—Homeschool Parent Orientation
- February 4th—NWEA Winter Testing ends
- February 4th—Field Trip – Castle Air Museum
- February 11th-- Assignment Work Record 6 Due
- February 11th, 18th, 25th -- GVS Staff Training with Dr. Rosenow
- February 14th —Teacher In-Service
- February 21st—No School: Presidents Day
- February 24th—Enrichment Spirit Day – Dr. Seuss Day

Chief Operating Officer's Report
January 31, 2022
Board Meeting



Process and Policy Updates

- ❖ Updating to New CDPH Isolation & Quarantine Guidelines – In Progress
- ❖ Develop Federal Funding Policies for Compliance – In Progress
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ GVA Marketing Focus Group Process – Complete
- ❖ Marketing Collateral for 2022 Enrollment Season – Complete
- ❖ Social Media Campaigns for 2022 Enrollment Season – Launched
- ❖ Managing COVID contact tracing – Ongoing
- ❖ Evaluating Kids' Care Leadership Structure for Both Campuses – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Launch of SchoolWise Parent Portal – April 2021
- ❖ Certificated Salary Schedule Analysis – Restart February 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ December 2021
 - ❑ 2,066 Users Visited (87.6% New/12.4% Returning)
 - ❑ 5,425 Page Views
 - ❑ Users Averaged 1:20 Minutes on the Site
 - ❑ 55.33% Mobile – 43.97% Desktop – 0.70% Tablet
 - ❑ Type: Organic 62.60% – Direct 34.30% – Referral 2.40% – Social 0.70%

Training

- ❖ Governor's Budget Workshop – January 2022
- ❖ School Services HR Webinars – January 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing



Chief Executive Officer's Report
January 31, 2022
Board Meeting

State Accountability

- No data available (no testing 2020/21)
- NWEA data coming in February

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021 (virtual attendance)
- Governor's budget virtual conference: January 2022 + May 2022

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program
 - Intentional outreach to prior families
 - Marketing collateral, delivered to area preschools



Homeschool

- Ongoing support of 'new' principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021



Founders Report
Great Valley Academy School Board
January 31, 2022

The COVID pandemic is still causing some absences with staff and students. The Great Valley Smart staff have done a wonderful job covering for each other when someone is absent and being flexible when student group sizes change.

Vision screenings for staff and on campus students continue to be done on a weekly basis.

We have been working closely with the home school staff and families. We have been doing weekly staff trainings. As a result I have been able to do visual evaluations on more of the home school students and, when necessary, we have placed some of them into the GVS intervention program.

Trainings have continued with the GVS staff and they continue to gain more knowledge in how to improve visual skills in GVA students.

In the 1990s I was involved in a vision program in the Stanislaus County Juvenile Hall. It was after that project that I realized that we had to change our thinking to a preventive model by starting elementary schools to help prevent delinquency in the first place. I recently worked with Dr. Doug Major on a project dealing with the history of optometry's work with at risk youth. He included the Stanislaus juvenile program and Great Valley Academy in his report.

I am pleased with the progress of the GVS staff to eventually do student evaluations and to establish training programs for students that need GVS intervention. They can also aid teachers in understanding the importance of visual skills for successful learning.

Eldon Rosenow, Founder

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
November 29, 2021

MINUTES

Board Members Present: Steve Payne, Yolanda Meraz, Susan Nisan, Vince Jamison, Twila Tosh via Zoom audio

Board Members Absent: None

Great Valley Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Michael Ruehle, Russ Howell, Tarah Heilman

Audience Present: Megan Barajas, Brandon Cornell

**Call to Order/
Pledge of Allegiance:** Mr. Payne welcomed everyone and led the Pledge of Allegiance.

Communications: **COMMUNICATIONS**

**Written
Communications:** None

Public Participation: None

**Modesto Principal
Report:** Mr. Ruehle presented his report to the Board. He spoke about Jr. High projects and how much the students are enjoying working together.

**Salida Principal
Report:** Mr. Howell talked about the Jr. High students and the Culture of Kindness in Middle School book. 8th graders are doing multiple acts of kindness on campus and in the community.

**Homeschool Principal
Report:** Mrs. Heilman spoke about working with the GVS team and Dr. Rosenow about setting up weekly meetings with the goal being to get new Homeschool families into the GVS program.

**Chief Operating
Officer's Report:** Mrs. Meeks spoke about the upcoming parent marketing focus groups. There will be 6 sessions and we have 47 parents signed

MINUTES

Regular Meeting of the Board

November 29, 2021

Page | 2

up to attend. We will be marketing directly to 38 preschools in the area as well as doing Facebook advertising and updating our website. There will be no direct mail this year. Enrollment begins February 1st with both in person and Zoom meetings.

Chief Executive

Officer's Report:

Ms. Silvestre Franklin gave an update on vaccine mandate. The State does not anticipate mandating the COVID vaccines until at least July 1, 2022. The exemptions are still in place. Testing continues to be a resource and is going well. It is very beneficial to have that access both for the students and the staff.

Founder's Report:

Written report only

Approval of Agenda/

Order of Agenda:

The motion was made by Ms. Tosh, seconded by Mr. Payne, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mr. Jamison, seconded by Mrs. Meraz approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Action Items:

ACTION ITEMS

a. The motion was made by Mrs. Meraz, seconded by Mr. Jamison accepting the Modesto 2020/2021 Audit. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

November 29, 2021

Page | 3

b. The motion was made by Mr. Jamison, seconded by Mrs. Nisan accepting the Salida 2020/2021 Audit. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

c. The motion was made by Mrs. Nisan, seconded by Mrs. Meraz approving the Modesto Educator Effectiveness Local Plan. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

d. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Salida Educator Effectiveness Local Plan. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

e. The motion was made by Mrs. Nisan, seconded by Mr. Jamison approving the Modesto Budget Revision. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

f. The motion was made by Mr. Jamison, seconded by Mrs. Meraz approving the Salida Budget Revision. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

November 29, 2021

P a g e | 4

g. The motion was made by Mrs. Meraz, seconded by Mr. Payne approving the Updated COVID Safety Plan. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Information and

Discussion:

Monthly Financials

Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Monday January 31, 2022

~1209 Woodrow Ave. Suite A4 Modesto, 5:30 pm

Adjournment:

The meeting was adjourned at 6:14 pm

Great Valley Academy Modesto 2021-2022 Academic Calendar

2-9 Teacher In-Service- No School

10 1st Day of School

23-31 NWEA Testing

AUGUST 2021						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

16 days

FEBRUARY 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

18 days

End of Trimester = Feb. 25 (62 days)

1-4 NWEA Testing

2 Character Report Cards

14 Teacher In-Service- No School

21 Presidents' Day- No School

1-16 NWEA Testing

6 Labor Day- No School

17 Teacher In-Service- No School

SEPTEMBER 2021						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

20 days

MARCH 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

18 days

9 Academic Report Cards

16-18 Parent Teacher Conferences

21-25 Spring Break- No School

6 Character Report Cards

6-8 Parent/Teacher Conferences

11-15 Fall Break- No School

OCTOBER 2021						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

16 days

APRIL 2022						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

19 days

15 Spring Holiday- No School

18 Spring Holiday- No School

11-29 SBAC Testing

11 Veterans Day- No School

17 Academic Report Cards

24-26 Thanksgiving Break- No School

NOVEMBER 2021						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

18 days

End of Trimester = Nov. 5 (57 days)

MAY 2022						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

4 Character Report Cards

6 Teacher In-Service- No School

2-6 Smarter Balanced

30 Memorial Day- No School

20-31 Winter Break- No School

DECEMBER 2021						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

13 days

JUNE 2022						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

3 days

End of Trimester = June 3 (62 days)

1 Academic Report Cards

3 Last Day of School

3 Teacher In-Service- No School

10-31 NWEA Winter Testing

17 M.L King Day- No School

JANUARY 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

19 days

JULY 2022						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Teacher In-Service Days
180 School Days

Great Valley Academy Salida 2021-2022 Academic Calendar

2-9 Teacher In-Service- No School

10 1st Day of School

AUGUST 2021						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

16 days

FEBRUARY 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

18 days

End of Trimester = Feb. 25 (62 days)

9-11 Parent/Teacher Conferences

14 Teacher In-Service- No School

21 Presidents' Day- No School

6 Labor Day- No School

17 Teacher In-Service- No School

SEPTEMBER 2021						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

20 days

MARCH 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

18 days

14-18 Spring Break- No School

6-8 Parent/Teacher Conferences

11-15 Fall Break- No School

OCTOBER 2021						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

16 days

APRIL 2022						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

19 days

15 Spring Holiday- No School

18 Spring Holiday- No School

11 Veterans Day- No School

24-26 Thanksgiving Break- No School

NOVEMBER 2021						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

18 days

End of Trimester = Nov. 5 (57 days)

MAY 2022						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

6 Teacher In-Service- No School

30 Memorial Day- No School

20-31 Winter Break- No School

DECEMBER 2021						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

13 days

JUNE 2022						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

3 days

End of Trimester = June 3 (62 days)

3 Last Day of School

3 Teacher In-Service- No School

17 M.L King Day- No School

JANUARY 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

19 days

JULY 2022						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Teacher In-Service Days

180 School Days



Holiday Schedule Classified Staff 2021-2022 School Year

Monday, July 5, 2021	Independence Day
Monday, September 6, 2021	Labor Day
Thursday, November 11, 2021	Veteran's Day
Thursday & Friday, November 25 & 26, 2021	Thanksgiving Holidays
Thursday & Friday, December 23 & 24, 2021	Winter Holidays
Thursday & Friday, December 30 & 31, 2021	New Year's Holidays
Monday, January 17, 2022	Martin Luther King Jr. Day
Monday, February 21, 2022	President's Day
Friday & Monday, April 15 & 18, 2022	Spring Holidays
Monday, May 30, 2022	Memorial Day

Return of Organization Exempt From Income Tax

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

2020Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

A For the 2020 calendar year, or tax year beginning 7/01, 2020, and ending 6/30, 20 2021	
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C GREAT VALLEY ACADEMY, INC. 3200 TULLY ROAD MODESTO, CA 95350 F Name and address of principal officer: SAME AS C ABOVE
D Employer identification number 61-1506412 E Telephone number (209) 576-2283 G Gross receipts \$ 20,199,217.	
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527 J Website: WWW.GREATVALLEYACADEMY.COM K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ L Year of formation: 2008 M State of legal domicile: CA	
H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions. H(c) Group exemption number ▶	

Part I Summary			
Activities & Governance	1	Briefly describe the organization's mission or most significant activities: GREAT VALLEY ACADEMIES CREATE A SAFE, LOVED, LEARNING ENVIRONMENT WHERE ALL STUDENTS DEVELOP FOUNDATIONAL THINKING SKILLS AND POSITIVE CHARACTER TRAITS TO ACHIEVE THEIR GREATEST POTENTIAL.	
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.	
	3	Number of voting members of the governing body (Part VI, line 1a)	3 6
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4 6
	5	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	5 281
	6	Total number of volunteers (estimate if necessary)	6 0
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a 0.
	b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b 0.
Revenue	8	Contributions and grants (Part VIII, line 1h)	18,248,214. 20,018,493.
	9	Program service revenue (Part VIII, line 2g)	695,935. 172,377.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	29,324. 8,347.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	102,194.
	12	Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)	19,075,667. 20,199,217.
	Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)
14		Benefits paid to or for members (Part IX, column (A), line 4)	
15		Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	12,974,478. 13,362,128.
16a		Professional fundraising fees (Part IX, column (A), line 11e)	
b		Total fundraising expenses (Part IX, column (D), line 25) ▶	
17		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	5,055,207. 5,483,141.
18		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	18,029,685. 18,845,269.
19		Revenue less expenses. Subtract line 18 from line 12	1,045,982. 1,353,948.
Net Assets or Fund Balances		20	Total assets (Part X, line 16)
	21	Total liabilities (Part X, line 26)	7,511,219. 6,908,836.
	22	Net assets or fund balances. Subtract line 21 from line 20	14,590,769. 15,944,717.

Part II Signature Block					
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.					
Sign Here	▶	Signature of officer	Date		
	▶	STEVE PAYNE	PRESIDENT		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	JEFF NIGRO, CPA	JEFF NIGRO, CPA			P00222252
	Firm's name ▶	NIGRO & NIGRO PC			Firm's EIN ▶
	Firm's address ▶	25220 HANCOCK AVE STE 400 MURRIETA, CA 92562			Phone no. (951) 698-8783

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

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

GREAT VALLEY ACADEMIES CREATE A SAFE, LOVED, LEARNING ENVIRONMENT WHERE ALL STUDENTS DEVELOP FOUNDATIONAL THINKING SKILLS AND POSITIVE CHARACTER TRAITS TO ACHIEVE THEIR GREATEST POTENTIAL.

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

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

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

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code:) (Expenses \$ 15,654,061. including grants of \$) (Revenue \$)

THE ORGANIZATION PROVIDES CLASSROOM BASED INSTRUCTION TO STUDENTS IN GRADES KINDERGARTEN THROUGH 8TH GRADE. THE ORGANIZATION'S INQUIRY-BASED CURRICULUM WILL HELP STUDENTS BECOME SELF-MOTIVATED AND COMPETENT LIFE-LONG LEARNERS WHO ARE CRITICAL THINKERS, DEMONSTRATING CONFIDENCE AND CREATIVITY.

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

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

4e Total program service expenses ▶ 15,654,061.

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules (continued)

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

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

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

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

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 281		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 2b	X	
Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		
3a Did the organization have unrelated business gross income of \$1,000 or more during the year? 3a		X
b If 'Yes,' has it filed a Form 990-T for this year? If 'No' to line 3b, provide an explanation on Schedule O. 3b		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a		X
b If 'Yes,' enter the name of the foreign country ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? 5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? 5b		X
c If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T? 5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? 6a		X
b If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 6b		
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? 7a		X
b If 'Yes,' did the organization notify the donor of the value of the goods or services provided? 7b		
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? 7c		X
d If 'Yes,' indicate the number of Forms 8282 filed during the year. 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? 7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? 8		
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966? 9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? 9b		
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12. 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. 10b		
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders. 11a		
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a		
b If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year. 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state? 13a		
Note: See the instructions for additional information the organization must report on Schedule O.		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. 13b		
c Enter the amount of reserves on hand 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year? 14a		X
b If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation on Schedule O. 14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? 15		X
If 'Yes,' see instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? 16		X
If 'Yes,' complete Form 4720, Schedule O.		

Part VI Governance, Management, and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.Check if Schedule O contains a response or note to any line in this Part VI. ☒ **X****Section A. Governing Body and Management**

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

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

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

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ CA

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

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

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records ▶

SUSAN BUSBY 3200 TULLY ROAD MODESTO CA 95350 (209) 576-2283

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

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

See instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) LEAH SILVESTRE FRANKLIN CEO	40 0			X				157,879.	0.	17,591.
(2) DR ELDON ROSENOW FOUNDER	40 0				X			158,065.	0.	8,156.
(3) RUSSEL HOWELL PRINCIPAL	40 0					X		115,241.	0.	32,562.
(4) MICHAEL RUEHLE PRINCIPAL	40 0					X		111,054.	0.	31,602.
(5) CHRISTINE FROST PRINCIPAL	40 0					X		98,351.	0.	32,682.
(6) MARISA JACOBSON-MEEKS COO	40 0			X				97,224.	0.	11,935.
(7) STEVE PAYNE PRESIDENT	1 0	X		X				0.	0.	0.
(8) CHAD WOLF MEMBER	1 0	X						0.	0.	0.
(9) TWILA TOSH DESIGNEE	1 0	X						0.	0.	0.
(10) SUSAN NISAN SECRETARY	1 0	X		X				0.	0.	0.
(11) YOLANDA MERAZ VICE PRESIDENT	1 0	X		X				0.	0.	0.
(12) VINCE JAMISON MEMBER	1 0	X						0.	0.	0.
(13)										
(14)										

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(15) -----	-----								
(16) -----	-----								
(17) -----	-----								
(18) -----	-----								
(19) -----	-----								
(20) -----	-----								
(21) -----	-----								
(22) -----	-----								
(23) -----	-----								
(24) -----	-----								
(25) -----	-----								

1 b Subtotal 737,814. 0. 134,528.

c Total from continuation sheets to Part VII, Section A 0. 0. 0.

d Total (add lines 1b and 1c) 737,814. 0. 134,528.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 4

3 Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If 'Yes,' complete Schedule J for such individual.*

	Yes	No
3		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? *If 'Yes,' complete Schedule J for such individual.*

4	X	
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5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If 'Yes,' complete Schedule J for such person.*

5		X
----------	--	---

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
JASON STEVENS - CENCAL MECHANICAL 1254 LONE PALM AVENUE MODESTO, CA	REPAIRS	106,496.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ 1

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1 a					
	b Membership dues	1 b					
	c Fundraising events	1 c					
	d Related organizations	1 d					
	e Government grants (contributions)	1 e 20,018,493.					
	f All other contributions, gifts, grants, and similar amounts not included above ...	1 f					
	g Noncash contributions included in lines 1a-1f.	1 g					
	h Total. Add lines 1a-1f		20,018,493.				
Program Service Revenue	Business Code						
	2 a <u>CHILDCARE FEES</u>		93,199.	93,199.			
	b <u>OTHER PROGRAM REVENUE</u>		44,552.	44,552.			
	c <u>UNIFORMS</u>		34,626.	34,626.			
	d _____						
	e _____						
	f All other program service revenue ...						
	g Total. Add lines 2a-2f		172,377.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		8,347.			8,347.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross rents	(i) Real	(ii) Personal				
		6 a					
		b Less: rental expenses	6 b				
	c Rental income or (loss)	6 c					
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		7 a					
		b Less: cost or other basis and sales expenses	7 b				
	c Gain or (loss)	7 c					
	d Net gain or (loss)						
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18						
		8 a					
		b Less: direct expenses	8 b				
	c Net income or (loss) from fundraising events						
	9 a Gross income from gaming activities. See Part IV, line 19						
9 a							
b Less: direct expenses		9 b					
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances.							
	10 a						
	b Less: cost of goods sold.	10 b					
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	Business Code						
	11 a _____						
	b _____						
	c _____						
	d All other revenue						
	e Total. Add lines 11a-11d						
12 Total revenue. See instructions			20,199,217.	172,377.	0.	8,347.	

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	450,850.	0.	450,850.	0.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	10,012,909.	9,190,264.	822,645.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).	1,277,343.	1,256,907.	20,436.	
9 Other employee benefits.	1,271,831.	1,061,213.	210,618.	
10 Payroll taxes.	349,195.	264,368.	84,827.	
11 Fees for services (nonemployees):				
a Management.				
b Legal.	10,939.		10,939.	
c Accounting.	34,885.		34,885.	
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	1,339,844.	1,131,638.	208,206.	
12 Advertising and promotion.	20,715.		20,715.	
13 Office expenses.				
14 Information technology.				
15 Royalties.				
16 Occupancy.	72,330.	4,500.	67,830.	
17 Travel.	60,383.	45,208.	15,175.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.	312,088.		312,088.	
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	649,968.	645,221.	4,747.	
23 Insurance.	266,226.		266,226.	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>NONCAPITALIZED EQUIPMENT</u>	845,267.	755,431.	89,836.	
b <u>BOOKS AND SUPPLIES</u>	678,442.	643,279.	35,163.	
c <u>FOOD PROGRAM</u>	555,592.	553,759.	1,833.	
d <u>UTILITIES</u>	223,482.		223,482.	
e All other expenses.	412,980.	102,273.	310,707.	
25 Total functional expenses. Add lines 1 through 24e.	18,845,269.	15,654,061.	3,191,208.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X. ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash — non-interest-bearing	5,716,848.	1	6,255,781.
	2 Savings and temporary cash investments	1,279,569.	2	1,032,907.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	2,590,872.	4	3,504,124.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	42,069.	9	102,108.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 15,121,386.		
	b Less: accumulated depreciation	10b 3,227,376.		
		12,436,863.	10c	11,894,010.
	11 Investments — publicly traded securities		11	
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	35,767.	15	64,623.	
16 Total assets. Add lines 1 through 15 (must equal line 33)	22,101,988.	16	22,853,553.	
Liabilities	17 Accounts payable and accrued expenses	955,794.	17	520,868.
	18 Grants payable		18	
	19 Deferred revenue	12,221.	19	64,755.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	6,063,982.	23	5,805,569.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	479,222.	25	517,644.
	26 Total liabilities. Add lines 17 through 25	7,511,219.	26	6,908,836.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	14,383,971.	27	15,420,861.
	28 Net assets with donor restrictions	206,798.	28	523,856.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	14,590,769.	32	15,944,717.
	33 Total liabilities and net assets/fund balances	22,101,988.	33	22,853,553.

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI. ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	20,199,217.
2	Total expenses (must equal Part IX, column (A), line 25)	2	18,845,269.
3	Revenue less expenses. Subtract line 2 from line 1	3	1,353,948.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	14,590,769.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	15,944,717.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII. ☐

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

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TEEA0112L 10/19/20

Form 990 (2020)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

**Open to Public
Inspection**

Name of the organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

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

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

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

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

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

Section A. Public Support

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

Section B. Total Support

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

Section C. Computation of Public Support Percentage

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

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

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

Section A. Public Support

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

Section B. Total Support

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

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

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

Section D. Computation of Investment Income Percentage

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

19a 33-1/3% support tests—2020. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**b 33-1/3% support tests—2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally Integrated Supporting Organizations

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

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

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

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

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

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

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Schedule A (Form 990 or 990-EZ) 2020

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

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

Section E – Distribution Allocations (see instructions)

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

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Schedule A (Form 990 or 990-EZ) 2020

Part VI

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

COPY

Schedule B**(Form 990, 990-EZ,
or 990-PF)**Department of the Treasury
Internal Revenue Service**Schedule of Contributors**► **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
► **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2020

Name of the organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Organization type (check one):**Filers of:****Section:**

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering 'N/A' in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ► \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization GREAT VALLEY ACADEMY, INC.	Employer identification number 61-1506412
---	---

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CALIFORNIA DEPT OF EDUCATION 1430 N STREET SACRAMENTO, CA 95814-5901	\$ 14,152,622.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	STANISLAUS COUNTY OFFICE OF EDUCATI 1100 H STREET MODESTO, CA 95354-2338	\$ 2,550,988.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	SALIDA UNION ELEMENTARY SCHOOL DIST 4801 SISK ROAD SALIDA, CA 95368-9226	\$ 1,175,257.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	US DEPARTMENT OF EDUCATION 400 MARYLAND SW WASHINGTON, DC 20202	\$ 2,139,626.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	N/A		
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

Name of organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____ N/A
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
N/A			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**SCHEDULE D
(Form 990)**Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Financial Statements

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

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020**Open to Public
Inspection**

Employer identification number

GREAT VALLEY ACADEMY, INC.

61-1506412

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 6.

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

Part II Conservation Easements.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

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

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

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

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

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

☐ Yes ☐ No

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

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

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

☐ Yes ☐ No

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

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

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

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

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

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

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

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

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

b Assets included in Form 990, Part X. ► \$

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

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

a ☐ Public exhibition

b ☐ Scholarly research

c ☐ Preservation for future generations

d ☐ Loan or exchange program

e ☐ Other _____

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

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

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

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

	Amount
c Beginning balance.....	1 c
d Additions during the year.....	1 d
e Distributions during the year.....	1 e
f Ending balance.....	1 f

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

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

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

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

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

a Board designated or quasi-endowment ▶ _____ %

b Permanent endowment ▶ _____ %

c Term endowment ▶ _____ %

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

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

(i) Unrelated organizations.....

(ii) Related organizations.....

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

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

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

Part VI Land, Buildings, and Equipment.

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land.....		2,070,000.		2,070,000.
b Buildings.....		6,450,104.	1,277,888.	5,172,216.
c Leasehold improvements.....		6,119,364.	1,698,673.	4,420,691.
d Equipment.....		481,918.	250,815.	231,103.
e Other.....				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.).....				11,894,010.

BAA

Schedule D (Form 990) 2020

Part VII Investments – Other Securities.

N/A

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

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

Part VIII Investments – Program Related.

N/A

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.) .. ▶		

Part IX Other Assets.

N/A

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 15.) .. ▶	

Part X Other Liabilities.

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) ACCRUED PAYROLL & BENEFITS	254,233.
(3) NET DEFERRED PAY	263,411.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.) .. ▶	517,644.

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

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

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

1	Total revenue, gains, and other support per audited financial statements	1	20,199,217.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	20,199,217.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b.	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	20,199,217.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

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

1	Total expenses and losses per audited financial statements	1	18,845,269.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	18,845,269.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b.	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	18,845,269.

Part XIII Supplemental Information.

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

PART X - FASB ASC 740 FOOTNOTE

THE CHARTER IS A NON-PROFIT ENTITY EXEMPT FROM THE PAYMENT OF INCOME TAXES UNDER INTERNAL REVENUE CODE SECTION 501(C) (3) AND CALIFORNIA REVENUE AND TAXATION CODE SECTION 23701D. ACCORDINGLY, NO PROVISION HAS BEEN MADE FOR INCOME TAXES FOR ITS PRIMARY ACTIVITY. HOWEVER, THE CHARTER ALSO CONDUCTS UNRELATED CONSULTING ACTIVITIES FOR WHICH UNRELATED BUSINESS INCOME IS GENERATED. AS A RESULT, THIS INCOME IS TAXABLE, HOWEVER, MANAGEMENT BELIEVES THAT NO MATERIAL INCOME TAX LIABILITY WILL ARISE FOR THIS FISCAL YEAR, AND THEREFORE, NO PROVISION HAS BEEN MADE

BAA

Schedule D (Form 990) 2020

Part XIII Supplemental Information *(continued)***PART X - FASB ASC 740 FOOTNOTE (CONTINUED)**

FOR INCOME TAXES. MANAGEMENT HAS DETERMINED THAT ALL INCOME TAX POSITIONS ARE MORE LIKELY THAN NOT OF BEING SUSTAINED UPON POTENTIAL AUDIT OR EXAMINATION; THEREFORE, NO DISCLOSURES OF UNCERTAIN INCOME TAX POSITIONS ARE REQUIRED.

COPY

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

- **Complete if the organization answered 'Yes' on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
► **Attach to Form 990 or Form 990-EZ.**
► **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
3 Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its taxable year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe. If 'No,' please explain. If you need more space, use Part II	X	
<u>ALL MATERIALS FOR PROMOTION AND ENROLLMENT CONTAIN NON-DISCRIMINATION STATEMENTS.</u>		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?		X
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered 'No' to any of the above, please explain. If you need more space, use Part II.		
<u>THE SCHOOL IS A PUBLIC CHARTER SCHOOL. THERE IS NO TUITION SO SCHOLARSHIPS AND FINANCIAL ASSISTANCE ARE NOT APPLICABLE.</u>		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered 'Yes' to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended?		X
If you answered 'Yes' on either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If 'No,' explain on Part II	X	

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

COPY

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered 'Yes' on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

**Open to Public
Inspection**

Name of the organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part I Questions Regarding Compensation

1 a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

☐ First-class or charter travel

☐ Housing allowance or residence for personal use

☐ Travel for companions

☐ Payments for business use of personal residence

☐ Tax indemnification and gross-up payments

☐ Health or social club dues or initiation fees

☐ Discretionary spending account

☐ Personal services (such as maid, chauffeur, chef)

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If 'No,' complete Part III to explain.

1 b

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

2

3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

☐ Compensation committee

☐ Written employment contract

☐ Independent compensation consultant

☒ Compensation survey or study

☐ Form 990 of other organizations

☒ Approval by the board or compensation committee

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

a Receive a severance payment or change-of-control payment?

4 a

X

b Participate in or receive payment from a supplemental nonqualified retirement plan?

4 b

X

c Participate in or receive payment from an equity-based compensation arrangement?

4 c

X

If 'Yes' to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

a The organization?

5 a

X

b Any related organization?

5 b

X

If 'Yes' on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

a The organization?

6 a

X

b Any related organization?

6 b

X

If 'Yes' on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If 'Yes,' describe in Part III.

7

X

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)?
If 'Yes,' describe in Part III.

8

X

9 If 'Yes' on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

9

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

Schedule J (Form 990) 2020

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1	LEAH SILVESTRE FRANKLIN CEO	(i) 157,879.	(ii) 0.	(iii) 0.	6,297.	11,294.	175,470.	0.
		(ii) 0.	0.	0.	0.	0.	0.	0.
2	DR ELDON ROSENOW FOUNDER	(i) 158,065.	(ii) 0.	(iii) 0.	6,328.	1,828.	166,221.	0.
		(ii) 0.	0.	0.	0.	0.	0.	0.
3		(i)						
		(ii)						
4		(i)						
		(ii)						
5		(i)						
		(ii)						
6		(i)						
		(ii)						
7		(i)						
		(ii)						
8		(i)						
		(ii)						
9		(i)						
		(ii)						
10		(i)						
		(ii)						
11		(i)						
		(ii)						
12		(i)						
		(ii)						
13		(i)						
		(ii)						
14		(i)						
		(ii)						
15		(i)						
		(ii)						
16		(i)						
		(ii)						

Part III Supplemental Information

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

COPY

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Information to Form 990 or 990-EZ

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

► Attach to Form 990 or 990-EZ.

► Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2020

**Open to Public
Inspection**

Employer identification number

GREAT VALLEY ACADEMY, INC.

61-1506412

FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS

A CPA FIRM WILL PREPARE THE TAX RETURN FOR THE ORGANIZATION AND SEND A DRAFT COPY TO LEAH SILVESTRE FRANKLIN, CEO, WHO WILL FORWARD THE DRAFT COPY TO THE SCHOOL BOARD FOR APPROVAL PRIOR TO FILING. ONCE APPROVED, THE CEO WILL NOTIFY THE FIRM TO FINALIZE AND PREPARE THE RETURN FOR MAILING.

FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS

ALL MEMBERS OF THE GOVERNING BOARD AND KEY EMPLOYEES ARE REQUIRED TO SUBMIT ANNUAL STATEMENTS DISCLOSING ANY REPORTABLE INVESTMENTS, INTERESTS IN REAL PROPERTY AND BUSINESS POSITIONS HELD.

FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS - CEO & TOP MANAGEMENT

EXECUTIVE COMPENSATION IS REVIEWED AND APPROVED BY THE SCHOOL BOARD. IT IS DETERMINED BY ANNUAL INDUSTRY REVIEW OF COMPARABLE POSITIONS, AVERAGE COMPENSATION, PERFORMANCE AND SCHOOL BUDGET.

FORM 990, PART VI, LINE 15B - COMPENSATION REVIEW & APPROVAL PROCESS - OFFICERS & KEY EMPLOYEES

OTHER OFFICERS COMPENSATION IS REVIEWED AND APPROVED BY THE SCHOOL BOARD. COMPENSATION IS BASED ON INDUSTRY AVERAGE, PERFORMANCE AND SCHOOL BUDGET.

FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE

REQUESTS FOR PUBLIC RECORDS SHALL BE MADE TO THE CEO OF THE ORGANIZATION. THE CEO OR DESIGNEE MAY DETERMINE THE MOST APPROPRIATE SCHOOL EMPLOYEE TO ASSIST IN ASSEMBLING ANY PUBLIC RECORDS FOR PRODUCTION. ANY PERSON MAY REQUEST A COPY OF ANY SCHOOL RECORD OPEN TO THE PUBLIC AND NOT EXEMPT FROM DISCLOSURE. PUBLIC ACCESS SHALL NOT BE GIVEN TO RECORDS LISTED AS EXEMPT FROM PUBLIC DISCLOSURE IN THE CALIFORNIA PUBLIC RECORDS ACT OR OTHER STATUTES.

2020

California Exempt Organization
Annual Information Return

199

Calendar Year 2020 or fiscal year beginning (mm/dd/yyyy) 7/01/2020, and ending (mm/dd/yyyy) 6/30/2021.

Corporation/Organization name GREAT VALLEY ACADEMY, INC.		California corporation number 2892498
Additional information. See instructions.		FEIN 61-1506412
Street address (suite or room) 3200 TULLY ROAD		PMB no.
City MODESTO	State CA	Zip code 95350
Foreign country name	Foreign province/state/county	Foreign postal code

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

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

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8.	1	180,724.
	2	Gross dues and assessments from members and affiliates.	2	
	3	Gross contributions, gifts, grants, and similar amounts received. SEE SCH. B.	3	20,018,493.
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Information B.	4	20,199,217.
	5	Cost of goods sold.	5	
	6	Cost or other basis, and sales expenses of assets sold.	6	
	7	Total costs. Add line 5 and line 6.	7	
	8	Total gross income. Subtract line 7 from line 4.	8	20,199,217.
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18.	9	18,845,269.
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8.	10	1,353,948.
Filing Fee	11	Total payments.	11	
	12	Use tax. See General Information K.	12	
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11.	13	
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12.	14	
	15	Penalties and Interest. See General Information J.	15	
	16	Balance due. Add line 12 and line 15. Then subtract line 11 from the result.	16	0.
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Paid Preparer's Use Only	Signature of officer	Title PRESIDENT	Date	Telephone (209) 576-2283
	Preparer's signature	JEFF NIGRO, CPA	Date	PTIN P00222252
	Firm's name (or yours, if self-employed) and address	NIGRO & NIGRO PC 25220 HANCOCK AVE STE 400 MURRIETA, CA 92562		Firm's FEIN 30-0636241
				Telephone (951) 698-8783
	May the FTB discuss this return with the preparer shown above? See instructions. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

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

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions.	•	1	
	2	Interest	•	2	
	3	Dividends	•	3	
	4	Gross rents	•	4	
	5	Gross royalties	•	5	
	6	Gross amount received from sale of assets (See Instructions)	•	6	
	7	Other income. Attach schedule. SEE STATEMENT 1	•	7	180,724.
Expenses and Disbursements	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Page 1, Part I, line 1.		8	180,724.
	9	Contributions, gifts, grants, and similar amounts paid. Attach schedule.	•	9	
	10	Disbursements to or for members.	•	10	
	11	Compensation of officers, directors, and trustees. Attach schedule. SEE STMT 2	•	11	450,850.
	12	Other salaries and wages	•	12	10,012,909.
	13	Interest	•	13	312,088.
	14	Taxes	•	14	349,195.
	15	Rents	•	15	72,330.
	16	Depreciation and depletion (See instructions)	•	16	649,968.
	17	Other expenses and disbursements. Attach schedule. SEE STATEMENT 3	•	17	6,997,929.
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Page 1, Part I, line 9.		18	18,845,269.

Schedule L Balance Sheet		Beginning of taxable year		End of taxable year	
		(a)	(b)	(c)	(d)
Assets					
1	Cash		6,996,417.	•	7,288,688.
2	Net accounts receivable		2,590,872.	•	3,504,124.
3	Net notes receivable			•	
4	Inventories			•	
5	Federal and state government obligations			•	
6	Investments in other bonds			•	
7	Investments in stock			•	
8	Mortgage loans			•	
9	Other investments. Attach schedule			•	
10 a	Depreciable assets	12,944,273.		13,051,386.	
b	Less accumulated depreciation	2,577,410.	10,366,863.	3,227,376.	9,824,010.
11	Land		2,070,000.	•	2,070,000.
12	Other assets. Attach schedule. STM 4		77,836.	•	166,731.
13	Total assets		22,101,988.		22,853,553.
Liabilities and net worth					
14	Accounts payable		955,794.	•	520,868.
15	Contributions, gifts, or grants payable			•	
16	Bonds and notes payable			•	
17	Mortgages payable		6,063,982.	•	5,805,569.
18	Other liabilities. Attach schedule. STM 5		491,443.		582,399.
19	Capital stock or principal fund		14,590,769.	•	15,944,717.
20	Paid-in or capital surplus. Attach reconciliation.			•	
21	Retained earnings or income fund			•	
22	Total liabilities and net worth		22,101,988.		22,853,553.

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

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

1	Net income per books	•	1,353,948.	7	Income recorded on books this year not included in this return. Attach schedule	•	
2	Federal income tax	•		8	Deductions in this return not charged against book income this year. Attach schedule.	•	
3	Excess of capital losses over capital gains	•		9	Total. Add line 7 and line 8		
4	Income not recorded on books this year. Attach schedule.	•		10	Net income per return. Subtract line 9 from line 6.		1,353,948.
5	Expenses recorded on books this year not deducted in this return. Attach schedule	•					
6	Total. Add line 1 through line 5.		1,353,948.				

**Application for Automatic Extension of Time To File an
Exempt Organization Return**

► **File a separate application for each return.**
► **Go to www.irs.gov/Form8868 for the latest information.**

OMB No. 1545-0047

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.		Taxpayer identification number (TIN)
	GREAT VALLEY ACADEMY, INC.		61-1506412
	Number, street, and room or suite number. If a P.O. box, see instructions.		
	3200 TULLY ROAD		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	MODESTO, CA 95350		

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► SUSAN BUSBY

Telephone No. ► (209) 576-2283

Fax No. ► (209) 576-2838

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ... ☐ and attach a list with the names and TINs of all members the extension is for.

- 1 I request an automatic 6-month extension of time until 5/15, 20 22, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☐ calendar year 20 ____ or

► ☒ tax year beginning 7/01, 20 20, and ending 6/30, 20 21.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2020)

Schedule B**(Form 990, 990-EZ,
or 990-PF)**Department of the Treasury
Internal Revenue ServiceCALIFORNIA COPY
Schedule of Contributors

OMB No. 1545-0047

2020► **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
► **Go to www.irs.gov/Form990 for the latest information.**

Name of the organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Organization type (check one):**Filers of:****Section:**

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering 'N/A' in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ► \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization GREAT VALLEY ACADEMY, INC.	Employer identification number 61-1506412
---	---

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CALIFORNIA DEPT OF EDUCATION 1430 N STREET SACRAMENTO, CA 95814-5901	\$ 14,152,622.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	STANISLAUS COUNTY OFFICE OF EDUCATI 1100 H STREET MODESTO, CA 95354-2338	\$ 2,550,988.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	SALIDA UNION ELEMENTARY SCHOOL DIST 4801 SISK ROAD SALIDA, CA 95368-9226	\$ 1,175,257.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	US DEPARTMENT OF EDUCATION 400 MARYLAND SW WASHINGTON, DC 20202	\$ 2,139,626.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

GREAT VALLEY ACADEMY, INC.

61-1506412

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
N/A			
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

Name of organization

GREAT VALLEY ACADEMY, INC.

Employer identification number

61-1506412

Part III	<i>Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8),</i>
-----------------	--

or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶\$

contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)..... ▶\$ _____ N/A
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee	

2020**Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W.

FORM 3885 ONLY

Corporation name

California corporation number

GREAT VALLEY ACADEMY, INC.**2892498****Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2021. Add line 9 and line 10, less line 12.....	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	08/09 SITE IMPR	6/30/2009	60,961.	60,961.	S/L	15		
	09/10 SITE IMPR	6/30/2010	220,543.	156,738.	S/L	15	14,703.	
	10/11 SITE IMPR	6/30/2011	222,282.	133,371.	S/L	15	14,819.	
	11/12 SITE IMPR	6/30/2012	19,091.	6,876.	S/L	25	764.	
	12/13 SITE IMPR	6/30/2013	24,648.	11,501.	S/L	15	1,643.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	263,358.

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

Part IV Amortization

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22

2020**Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W.

FORM 3885 ONLY

Corporation name

California corporation number

GREAT VALLEY ACADEMY, INC.**2892498****Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2021. Add line 9 and line 10, less line 12.....	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	09/10 BUILDINGS	6/30/2010	2,130,000.	616,407.	S/L	35	60,857.	
	10/11 BUILDINGS	6/30/2011	131,833.	47,457.	S/L	25	5,273.	
	11/12 BUILDINGS	7/01/2011	121,663.	43,803.	S/L	25	4,867.	
	12/13 BUILDINGS	6/30/2013	17,931.	5,019.	S/L	25	717.	
	09/10 EQUIPMENT	9/21/2009	8,676.	8,676.	S/L	10		
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

Part IV Amortization

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22

2020**Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W.

FORM 3885 ONLY

Corporation name

California corporation number

GREAT VALLEY ACADEMY, INC.**2892498****Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2021. Add line 9 and line 10, less line 12.....	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
12/13	EQUIPMENT	10/31/2012	9,775.	7,498.	S/L	10	978.	
11/12	SITE IMPR	6/30/2012	97,316.	51,904.	S/L	15	6,488.	
12/13	SITE IMPR	6/30/2013	184,245.	85,981.	S/L	15	12,283.	
12/13	EQUIPMENT	6/30/2013	22,559.	15,792.	S/L	10	2,256.	
11/12	EQUIPMENT	6/30/2012	5,157.	4,128.	S/L	10	516.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

Part IV Amortization

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22

2020**Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W.

FORM 3885 ONLY

Corporation name

California corporation number

GREAT VALLEY ACADEMY, INC.**2892498****Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2021. Add line 9 and line 10, less line 12.....	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	13/14 SITE IMPR	6/30/2014	357,199.	142,878.	S/L	15	23,813.	
	13/14 EQUIPMENT	6/30/2014	67,218.	40,332.	S/L	10	6,722.	
	13/14 SITE IMPR	6/30/2014	642,841.	257,136.	S/L	15	42,856.	
	13/14 EQUIPMENT	6/30/2014	41,185.	24,714.	S/L	10	4,119.	
	14/15 SITE IMPR	6/30/2015	355,612.	118,535.	S/L	15	23,707.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

Part IV Amortization

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22

2020**Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W.

FORM 3885 ONLY

Corporation name

California corporation number

GREAT VALLEY ACADEMY, INC.**2892498****Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2021. Add line 9 and line 10, less line 12.....	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
14/15	EQUIPMENT	6/30/2015	51,094.	25,545.	S/L	10	5,109.	
14/15	SITE IMPR	6/30/2015	51,706.	17,235.	S/L	15	3,447.	
14/15	EQUIPMENT	6/30/2015	274,210.	137,105.	S/L	10	27,421.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

Part IV Amortization

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22

GREAT VALLEY ACADEMY, INC.

61-1506412

STATEMENT 1
FORM 199, PART II, LINE 7
OTHER INCOME

OTHER INVESTMENT INCOME.....	\$	8,347.
PROGRAM SERVICE REVENUE.....		172,377.
TOTAL	\$	<u>180,724.</u>

STATEMENT 2
FORM 199, PART II, LINE 11
COMPENSATION OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

CURRENT OFFICERS:

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	TOTAL COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
STEVE PAYNE 3200 TULLY ROAD MODESTO, CA 95350	PRESIDENT 1.00	\$ 0.	\$ 0.	\$ 0.
CHAD WOLF 3200 TULLY ROAD MODESTO, CA 95350	MEMBER 1.00	0.	0.	0.
TWILA TOSH 3200 TULLY ROAD MODESTO, CA 95350	DESIGNEE 1.00	0.	0.	0.
SUSAN NISAN 3200 TULLY ROAD MODESTO, CA 95350	SECRETARY 1.00	0.	0.	0.
YOLANDA MERAZ 3200 TULLY ROAD MODESTO, CA 95350	VICE PRESIDENT 1.00	0.	0.	0.
VINCE JAMISON 3200 TULLY ROAD MODESTO, CA 95350	MEMBER 1.00	0.	0.	0.
LEAH SILVESTRE FRANKLIN 3200 TULLY ROAD MODESTO, CA 95350	CEO 40.00	175,470.	6,297.	11,294.
MARISA JACOBSON-MEEKS 3200 TULLY ROAD MODESTO, CA 95350	COO 40.00	109,159.	3,367.	8,568.
TOTAL		<u>\$ 284,629.</u>	<u>\$ 9,664.</u>	<u>\$ 19,862.</u>

GREAT VALLEY ACADEMY, INC.

61-1506412

STATEMENT 2 (CONTINUED)

FORM 199, PART II, LINE 11

COMPENSATION OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

KEY EMPLOYEES:

NAME	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
DR ELDON ROSENOW 3200 TULLY ROAD MODESTO, CA 95340	FOUNDER 40	\$ 166,221.	\$ 6,328.	\$ 1,828.
TOTAL		<u>\$ 166,221.</u>	<u>\$ 6,328.</u>	<u>\$ 1,828.</u>

STATEMENT 3

FORM 199, PART II, LINE 17

OTHER EXPENSES

ACCOUNTING FEES.....	\$ 34,885.
ADVERTISING AND PROMOTION.....	20,715.
BOOKS AND SUPPLIES.....	678,442.
EQUIPMENT RENTAL.....	65,624.
FOOD PROGRAM.....	555,592.
INSURANCE.....	266,226.
LEGAL FEES.....	10,939.
MISCELLANEOUS.....	88,948.
NONCAPITALIZED EQUIPMENT.....	845,267.
OTHER EMPLOYEE BENEFIT.....	1,271,831.
OTHER FEES.....	1,339,844.
PENSION PLAN CONTRIBUTIONS.....	1,277,343.
POSTAGE AND SHIPPING.....	5,496.
REPAIRS & MAINT.....	193,614.
TAXES.....	2,199.
TELEPHONE AND INTERNET.....	57,099.
TRAVEL.....	60,383.
UTILITIES.....	223,482.
TOTAL	<u>\$ 6,997,929.</u>

STATEMENT 4

FORM 199, SCHEDULE L, LINE 12

OTHER ASSETS

INVENTORY.....	64,623.
PREPAID EXPENSES AND DEFERRED CHARGES.....	102,108.
TOTAL	<u>\$ 166,731.</u>

2020

CALIFORNIA STATEMENTS

PAGE 3

GREAT VALLEY ACADEMY, INC.

61-1506412

STATEMENT 5
FORM 199, SCHEDULE L, LINE 18
OTHER LIABILITIES

ACCRUED PAYROLL & BENEFITS.....	254,233.
DEFERRED REVENUE.....	64,755.
NET DEFERRED PAY.....	263,411.
TOTAL	<u>\$ 582,399.</u>

COPY

GREAT VALLEY ACADEMY, INC.

61-1506412

	2020	2019	DIFF
REVENUE			
CONTRIBUTIONS AND GRANTS.....	20,018,493	18,248,214	1,770,279
PROGRAM SERVICE REVENUE.....	172,377	695,935	-523,558
INVESTMENT INCOME.....	8,347	29,324	-20,977
OTHER REVENUE.....	0	102,194	-102,194
TOTAL REVENUE.....	20,199,217	19,075,667	1,123,550
EXPENSES			
SALARIES, OTHER COMPEN., EMP. BENEFITS...	13,362,128	12,974,478	387,650
OTHER EXPENSES.....	5,483,141	5,055,207	427,934
TOTAL EXPENSES.....	18,845,269	18,029,685	815,584
NET ASSETS OR FUND BALANCES			
REVENUE LESS EXPENSES.....	1,353,948	1,045,982	307,966
TOTAL ASSETS AT END OF YEAR.....	22,853,553	22,101,988	751,565
TOTAL LIABILITIES AT END OF YEAR.....	6,908,836	7,511,219	-602,383
NET ASSETS/FUND BALANCES AT END OF YEAR.	15,944,717	14,590,769	1,353,948

GREAT VALLEY ACADEMY, INC.

61-1506412

	2020	2019	DIFF
RECEIPTS AND REVENUES			
GROSS SALES OR RECEIPTS.....	180,724	864,830	-684,106
GROSS CONTRIBUTIONS, GIFTS, & GRANTS.....	20,018,493	18,248,214	1,770,279
TOTAL GROSS RECEIPTS.....	20,199,217	19,113,044	1,086,173
TOTAL COSTS.....	0	0	0
TOTAL GROSS INCOME.....	20,199,217	19,113,044	1,086,173
EXPENSES			
TOTAL EXPENSES.....	18,845,269	18,067,062	778,207
EXCESS RECEIPTS OVER EXPENSES.....	1,353,948	1,045,982	307,966
FILING FEE			
FILING FEE.....	0	0	0
BALANCE DUE.....	0	0	0

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6/30/21

2020 CALIFORNIA BOOK DEPRECIATION SCHEDULE

PAGE 1

GREAT VALLEY ACADEMY, INC.

61-1506412

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179 BONUS	SPECIAL DEPR. ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAG /BASIS REDUCT	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
DEPR. SCHEDULE ONLY																
BUILDINGS																
6	09/10 BUILDINGS MO	6/30/10		2,130,000							2,130,000	616,407	S/L	35		60,857
7	10/11 BUILDINGS MO	6/30/11		131,833							131,833	47,457	S/L	25		5,273
8	11/12 BUILDINGS MO	7/01/11		121,663							121,663	43,803	S/L	25		4,867
9	12/13 BUILDINGS MO	6/30/13		17,931							17,931	5,019	S/L	25		717
	TOTAL BUILDINGS			2,401,427		0	0	0	0	0	2,401,427	712,686				71,714
IMPROVEMENTS																
1	08/09 SITE IMPROVEMENT MO	6/30/09		60,961							60,961	60,961	S/L	15		0
2	09/10 SITE IMPROVEMENT MO	6/30/10		220,543							220,543	156,738	S/L	15		14,703
3	10/11 SITE IMPROVEMENT MO	6/30/11		222,282							222,282	133,371	S/L	15		14,819
4	11/12 SITE IMPROVEMENT MO	6/30/12		19,091							19,091	6,876	S/L	25		764
5	12/13 SITE IMPROVEMENT MO	6/30/13		24,648							24,648	11,501	S/L	15		1,643
12	11/12 SITE IMPROVEMENT MN	6/30/12		97,316							97,316	51,904	S/L	15		6,488
13	12/13 SITE IMPROVEMENT MN	6/30/13		184,245							184,245	85,981	S/L	15		12,283
16	13/14 SITE IMPROVEMENT MO	6/30/14		357,199							357,199	142,878	S/L	15		23,813
18	13/14 SITE IMPROVEMENT MN	6/30/14		642,841							642,841	257,136	S/L	15		42,856
20	14/15 SITE IMPROVEMENT MO	6/30/15		355,612							355,612	118,535	S/L	15		23,707
22	14/15 SITE IMPROVEMENT MN	6/30/15		51,706							51,706	17,235	S/L	15		3,447
	TOTAL IMPROVEMENTS			2,236,444		0	0	0	0	0	2,236,444	1,043,116				144,523
MACHINERY AND EQUIPMENT																

COPY

6/30/21

2020 CALIFORNIA BOOK DEPRECIATION SCHEDULE

PAGE 2

GREAT VALLEY ACADEMY, INC.

61-1506412

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179 BONUS	SPECIAL DEPR. ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAG /BASIS REDUCT	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
10	09/10 EQUIPMENT MO	9/21/09		8,676							8,676	8,676	S/L	10		0
11	12/13 EQUIPMENT MO	10/31/12		9,775							9,775	7,498	S/L	10		978
14	12/13 EQUIPMENT MN	6/30/13		22,559							22,559	15,792	S/L	10		2,256
15	11/12 EQUIPMENT MN	6/30/12		5,157							5,157	4,128	S/L	10		516
17	13/14 EQUIPMENT MO	6/30/14		67,218							67,218	40,332	S/L	10		6,722
19	13/14 EQUIPMENT MN	6/30/14		41,185							41,185	24,714	S/L	10		4,119
21	14/15 EQUIPMENT MO	6/30/15		51,094							51,094	25,545	S/L	10		5,109
23	14/15 EQUIPMENT MN	6/30/15		274,210							274,210	137,105	S/L	10		27,421
TOTAL MACHINERY AND EQUIPME				479,874		0	0	0	0	0	479,874	263,790				47,121
TOTAL DEPRECIATION				5,117,745		0	0	0	0	0	5,117,745	2,019,592				263,358
GRAND TOTAL DEPRECIATION				5,117,745		0	0	0	0	0	5,117,745	2,019,592				263,358



COVID Safety Plan (CSP)

Updated January 25, 2022
GREAT VALLEY ACADEMIES
3200 Tully Road, Modesto CA 95350



Great Valley Academy Charter Schools

Number of schools: 2

Total Enrollment: 1,627

Great Valley Academy-Modesto
3200 Tully Road
Modesto, CA 95355

Great Valley Academy-Salida
5901 Sisk Road
Modesto, CA 95356

Superintendent (or equivalent) Name: Leah Silvestre Franklin
3200 Tully Road
Modesto, CA
95350

Phone Number: (209)576-2283
Email: l.silvestre@greatvalleyacademy.com

Cleaning and Disinfection

Great Valley Academies provides the following related to cleaning and ventilation/air flow:

- All classroom, office and shared spaces are cleaned nightly
- Includes desks, chairs, tables, hard surfaces, high touchpoints
- Disinfectant spray, towels and gloves are available in every classroom, and high use areas
- Bathrooms are disinfected nightly
- Playground equipment is disinfected nightly
- Water fountains are closed; water filling stations are used, with disposable cups available to students without water bottles
- HVAC filters are all MERV 11 and are changed bi-monthly
- HVAC units are equipped with Bipolar Ionization Air Purifiers
- Doors and windows will be left open for improved air flow, as practicable

Entrance, Egress and Movement Within the School

- Volunteers and visitors are suspended (with the exception of service providers) to be reinstated in 2022 (dependent on local case rates)
- Student drop off and pick up is staff supervised; parents remain in vehicle, students escorted in/out of the vehicle and directed to classrooms/vehicle
- Parents arriving on campus for student drop off or pick up (outside of drop off/pickup process), must wear a face covering

Face Coverings and Other Essential Protective Gear

GVA follows the California Department of Public Health's (CDPH) face covering guidelines:

Age	Face Covering Requirement
under 2 years old	No
2 years old – 12 th grade	Yes

- Students are provided a face covering if needed
- All staff are required to wear a face covering unless they are instructing students in a way their mouth needs to be visible (speech, special education, English learner support, younger students), in which case, they may wear a face shield with drape (addressed on a case by case basis)
- Following CDPH guidance, students who are not exempt from wearing a face covering and choose not to wear one will be referred to an independent study program
- Students that are certified medically exempt are required to wear a shield with drape
- Face coverings can be removed for eating, drinking and outdoor activities
- Food Service Staff must wear gloves in addition to face covering

Healthy Hygiene Practices

- Signage is prominently displayed at school sites reminding individuals of proper hygiene protocols
- Hand sanitizer is available upon entry to school campuses
- Each classroom and common area has access to hand sanitizer
- Routines are established in support of frequent handwashing
- Handwashing or use of hand sanitizer will occur
 - upon entry to any instructional area
 - before and after eating
 - before and after recess
 - before and after PE activity
- Additional handwashing stations have been added at multiple strategic locations on each campus
- Restrooms are stocked with soap and paper towels, supplies will be checked and refilled nightly and during the school day

Health Screenings for Students and Staff

- GVA Staff and students are directed to complete self-screening prior to arriving on campus
- GVA staff and students are directed to stay home and see a health care provider if they experience any flu like symptoms
- Get tested for COVID when symptoms are compatible
- Students exhibiting symptoms are immediately sent to the office where they will be screened and will remain in a sick room until they can be picked up
- Sick room is disinfected after each use
- Staff exhibiting symptoms are sent home
- If student or staff is confirmed with a positive test result, GVA will work with Stanislaus County Public Health department and will communicate as appropriate with school community

Isolation and quarantine for students and staff

- For students: see Student Isolation and Quarantine Flowchart (included)
- For staff: see Staff Isolation and Quarantine Table (included)

Testing of Students and Staff

- GVA students exhibiting symptoms are immediately sent to the office where they are screened and remain in a sick room until they can be picked up, GVA then refers them to COVID 19 testing per CDPH guidelines. Receiving a negative test result is the fastest path to return to class.
- GVA staff have access to self-testing supplies and can access when recommended or needed for unvaccinated or vaccinated employees
- Unvaccinated GVA staff will also undergo weekly COVID surveillance testing provided by GVA

Identification and Tracing of Contacts

- GVA works in consultation with the Stanislaus County Public Health Department on topics including but not limited to tracing contacts of confirmed positive cases and provision of communication with those contacts as appropriate
- GVA participates in Shared Portal for Outbreak Tracking (SPOT) a local & statewide system which tracks absenteeism, positive cases and exposures.
- GVA conducts contact tracing and communication with those who were in close personal contact (CPC) with someone who has tested positive
- CDPH defines close personal contact as a person who is 0-6 feet from someone testing positive for more than 15 minutes over a 24 hour period
- GVA confidentially tracks both staff and student positive cases, data to include (not limited to) positivity determination date, return to campus date, and other relevant details
- GVA confidentially tracks both staff and student close personal contacts (CPC), related follow up and status
- Designated staff contact information provided to the Stanislaus County Public Health Department
 - Chief Executive Officer, Leah Silvestre Franklin
 - Chief Operating Officer, Marisa Meeks
- GVA follows the CDPH guidelines for measures to be taken when student or staff member have symptoms, is a CPC of someone who has the virus or tests positive with the virus

Staff Training and Family Education

- All staff are trained on cleaning protocols, face covering requirements, COVID 19 response, staff testing availability, hygiene practices, student illness protocol, student screening and visitor/volunteer suspension
- Families continue to receive ParentSquare communication regarding safety plans and ongoing updates
- In coordination with the Stanislaus County Public Health Officer, affected stakeholders will be notified via Email and ParentSquare regarding potential virus exposure

Reporting, Recordkeeping, and Access

It is our policy to:

- Report information about COVID-19 cases at our workplace to the local health department, and provide any related information requested by the local health department
- Report immediately to Cal/OSHA any COVID-19-related serious illnesses or death, as defined under CCR Title 8 section 330(h), of an employee occurring in our place of employment or in connection with any employment
- Maintain records of the steps taken to implement our COVID-19 Prevention Protocol
- Make our COVID-19 Prevention Protocol available to employees, and to representatives of Cal/OSHA upon request
- Use GVA database to keep a record of and track all COVID-19 cases; information may be made available as required by law, with personal identifying information removed

Communication Plans

- GVA communicates with Stanislaus County Public Health any positive case information received
- In coordination with the Stanislaus County Public Health Officer, GVA uses our Email, and ParentSquare posts to communicate with affected stakeholders of potential virus exposure. This communication will be consistent with legal counsel guidance regarding the Family Educational Rights and Privacy Act.
- GVA Chief Executive Officer, Chief Operating Officer or Human Resources representative communicate directly with affected staff members

COVID-19 Isolation Flowchart

For K-12 Schools



Isolation: Separating those who have COVID-19 from those who are not infected.

Isolation Day 0: The day the student developed symptoms or tested positive.

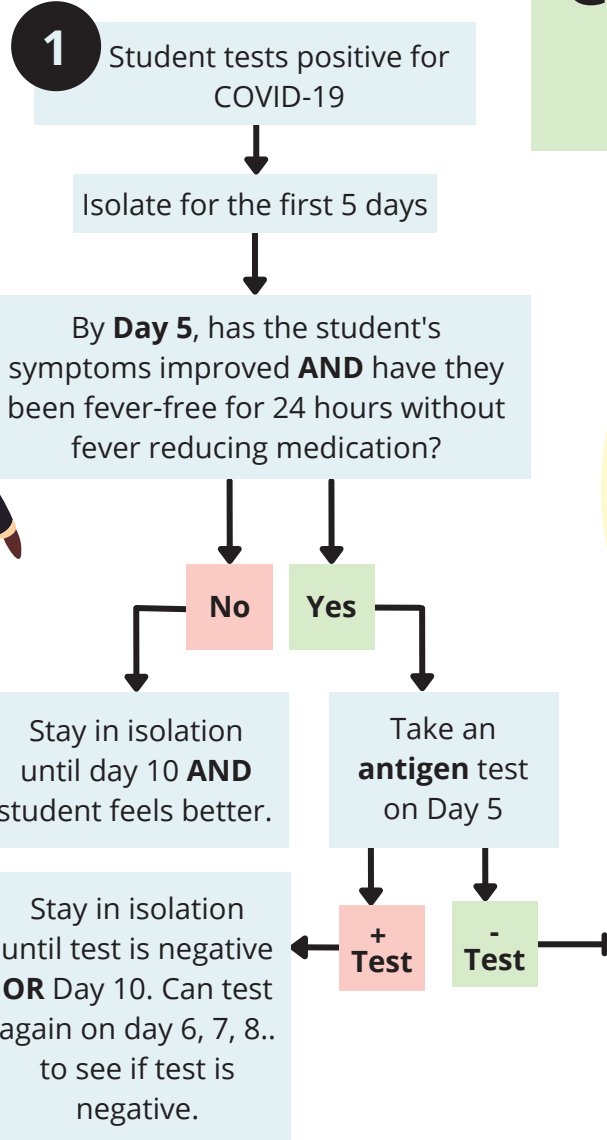
Isolation Day 1: The day AFTER symptoms started (if student has symptoms) OR test date (if no symptoms).

Quarantine: Separating those who were exposed to COVID-19 from others in case they become infected.

Quarantine Day 0: The last day the student was exposed to a COVID-19 positive person.

Quarantine Day 1: The day AFTER exposed to a COVID-19 positive person.

Asymptomatic: Student has no symptoms of COVID-19.



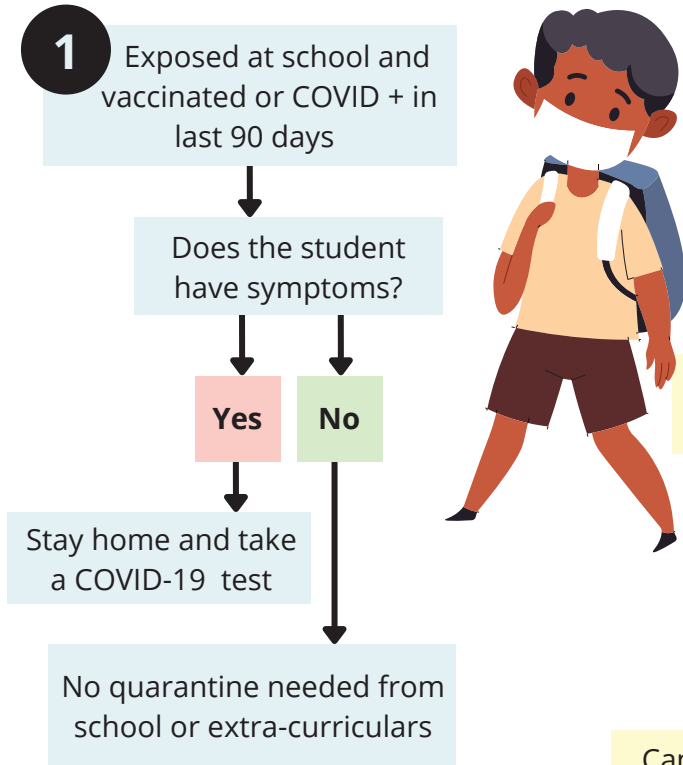
The student can return on **Day 6** if they're able to mask in **all environments** through Day 10.

The student can return to all extracurricular activities **as long as they can meet the masking requirement (activities where masks can't be worn must be avoided).**

COVID-19 Quarantine Flowchart

For K-12 Schools

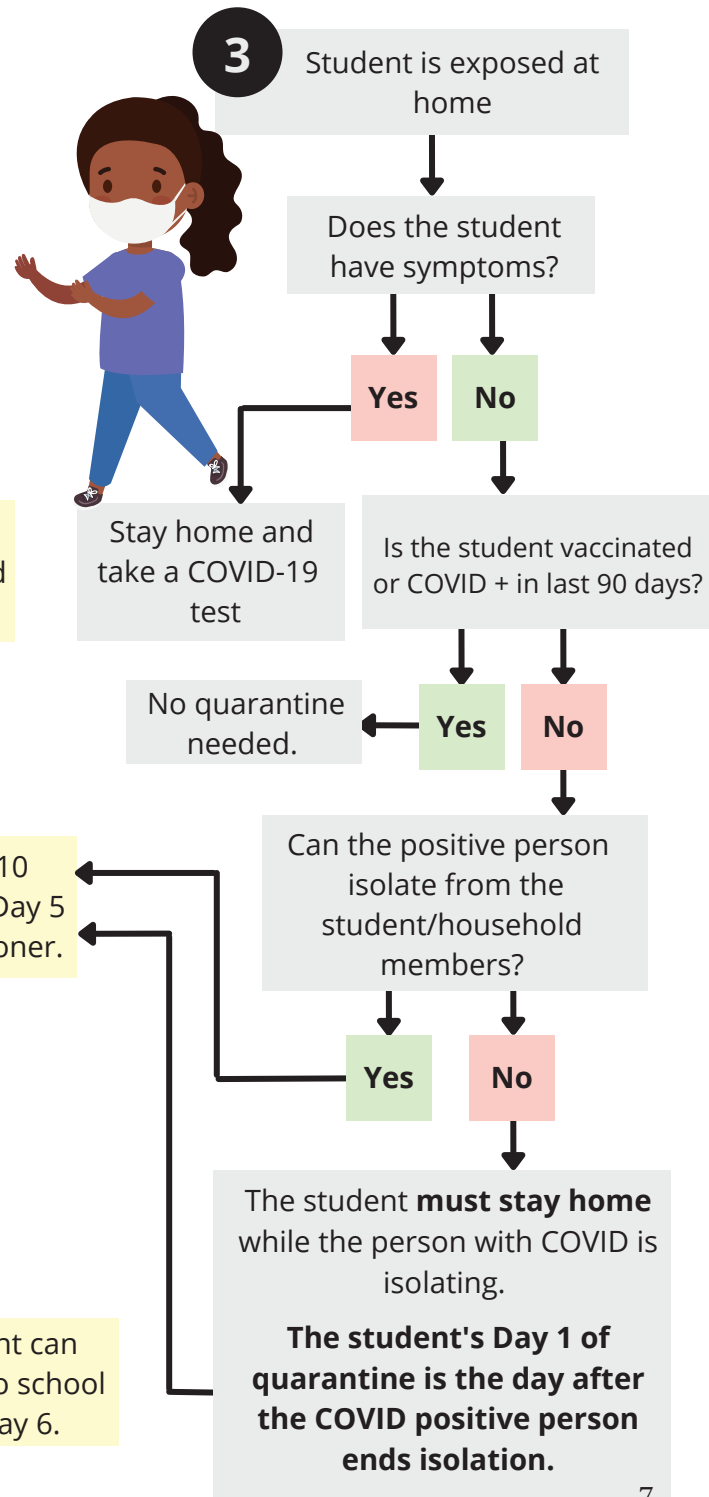
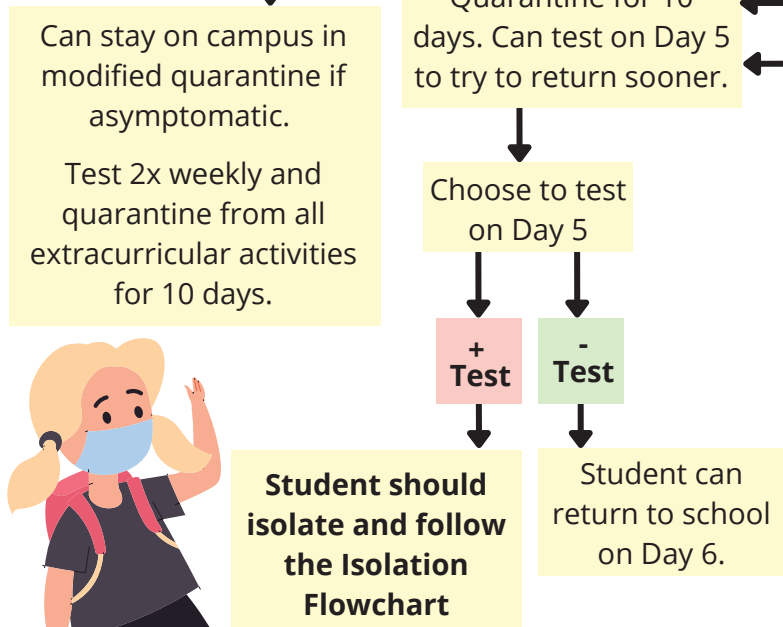
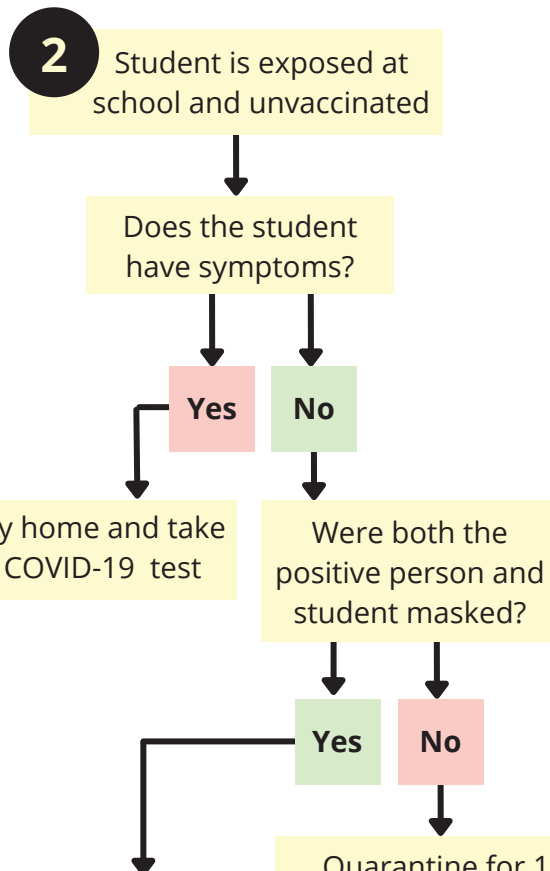
Individual Tracing Method



Typically, a person is exposed to someone with COVID-19 and then they quarantine away from them.

However, there are times when a student is exposed to a person who can't isolate from them (ex. the student's parent has COVID-19 and needs to care for the student). In that case, the student will be continuously exposed to someone who is contagious.

To stop the spread of COVID-19, the student will need to stay home during the positive person's isolation and then quarantine starting the day after that person's isolation ends.



Staff Isolation and Quarantine Guidance

Vaccination Status	Isolation or quarantine	Period of time to be excluded from work
All workers that test positive for COVID-19, regardless of vaccination status	Isolation	<ul style="list-style-type: none"> • Must be excluded from the workplace for at least 5 days • A worker can return to work <u>after</u> day 5 if they do not have symptoms <u>and</u> test negative. • If a worker cannot test or declines to test they can return to work <u>after</u> 10 days. • Must wear a face covering around others at work for a total of 10 days after the positive test.
Unvaccinated workers exposed to someone with COVID-19	Quarantine	<ul style="list-style-type: none"> • Must be excluded from the workplace for 5 days after the close contact <u>and</u> take a test on day 5. • A worker can come back to work <u>after</u> day 5 if they test negative and do not have any symptoms. • If the worker cannot test or declines to test they can return to the workplace after day 10 if they do not have symptoms. • Must wear a face covering around others at work for 10 days after exposure. • If the worker develops symptoms, they must be excluded pending a test result.
Booster-eligible, but not boosted workers exposed to someone with COVID-19	No quarantine	<ul style="list-style-type: none"> • Does not need to be excluded from work if asymptomatic but must have a negative test 3-5 days after close contact. • Must wear a face covering around others at work for 10 days after exposure. • If they develop symptoms, the worker must be excluded from the workplace pending a test result.
Workers received a booster, or are fully vaccinated but not yet booster-eligible exposed to someone with COVID-19	No quarantine	<ul style="list-style-type: none"> • Does not need to be excluded from work if asymptomatic, but must have a test <u>on day 5</u> after exposure. • Must wear a face covering around others at work for 10 days after exposure. • If they develop symptoms, the worker must be excluded from the workplace pending a test result.

**GREAT VALLEY ACADEMY
FORMAL RECORD OF ACTION**

The following is a formal record of action taken by the governing body of GREAT VALLEY ACADEMY (the "Company").

With respect to the GREAT VALLEY ACADEMY 401(K) PLAN AND TRUST (the "Plan"), the following resolutions are hereby adopted:

RESOLVED: That the Company has designated the following amounts as contributions to the Plan for the 6/30/2021 plan year:

Employer Matching Contributions	\$87,704.93
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RESOLVED FURTHER: That the appropriate officers of the Company be, and they hereby are, authorized and directed to pay such amounts on behalf of the Company when required by the Plan or regulation;

RESOLVED FURTHER: That the officers of the Company be, and they hereby are, authorized and directed to take any and all actions and execute and deliver such documents as they may deem necessary, appropriate or convenient to effect the foregoing resolutions including, without limitation, causing to be prepared and filed such reports documents or other information as may be required under applicable law.

Dated this _____ day of _____, 2021.

Secretary / Principal

Great Valley Academy Modesto
December 2021

	A Actual YTD Jul 21 - Dec 21	B Revised Budget YTD Jul 21 - Dec 21	C Estimated Balance of year Jan 22-Jun 22	D Revised Budget Balance of year Jan 22-Jun 22	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	3,131,025	3,131,025	4,258,622	4,258,621	8,290,756	7,389,646	7,389,647
8100 · Federal Revenue	210,848	210,848	914,264	914,265	1,300,605	1,125,113	1,125,113
8300 · Other State Revenues	-35,058	-35,058	960,826	960,826	630,743	925,768	925,768
8600 · Other Local Revenue	222,012	222,012	47,988	47,988	458,500	270,000	270,000
8700 · Selpa	237,642	237,642	225,398	225,398	463,040	463,040	463,040
Total Income	3,766,469	3,766,469	6,407,098	6,407,098	11,143,644	10,173,567	10,173,567
Gross Profit	3,766,469	3,766,469	6,407,098	6,407,098	11,143,644	10,173,567	10,173,567
Expense							
1000 · Certificated Salaries	1,646,954	1,646,954	2,180,338	2,180,339	3,906,294	3,827,293	3,827,292
2000 · Classified Salaries	988,335	988,335	1,363,141	1,363,141	2,231,245	2,351,476	2,351,476
3000 · Employee Benefits	669,999	669,999	1,117,679	1,117,679	1,705,219	1,787,678	1,787,678
4000 · Books & Supplies	509,212	509,212	453,418	453,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	664,820	664,820	700,305	700,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	17,335	58,365	58,365	78,000	75,700	75,700
7430 · All Other Financing Uses	106,031	106,031	141,348	141,348	247,379	247,379	247,379
Total Expense	4,602,686	4,602,686	6,014,594	6,014,594	11,008,402	10,617,280	10,617,280
Net Ordinary Income	-836,217	-836,217	392,504	392,504	135,241	-443,713	-443,713

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,379.49	P1 5,646,033.64	5,146,029.66	5,442,498.27	5,011,416.94	4,540,046.27		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00	288,693.80	179,611.43	179,611.43	179,611.43	179,611.43	179,611.43	0.00	3,207,708.94
EPA Funding	8012		0.00	534,335.00				604,207.69		604,207.69			604,207.68	0.00	2,346,958.06
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	135,466.40	135,466.40	169,333.04	169,333.04	169,333.04	169,333.04	169,333.04	1,693,330.00
Selma Prop Tax	8097							70,825.00						70,825.00	141,650.00
Federal IDEA	8181													118,486.00	118,486.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	34,420.00	34,420.00	34,420.00	34,420.00	34,420.00	34,420.00	64,381.78	414,821.00
Title 1, Part A	8290													117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				162,398.26		162,398.26				82,374.98	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	1,800.00	1,800.00	1,800.00	1,800.00	1,400.00	1,000.00	1,802.89	22,000.00
Educator Effectiveness	8550													251,726.00	251,726.00
Mandated Cost Reimb	8550							15,255.46						0.00	15,255.46
Lottery	8560							39,889.35			39,889.35			64,709.39	144,488.09
Lottery, prop 20	8561										0.00			28,808.98	57,617.95
In Person Inst Grant 7422	8590		0.00	0.00									28,808.98	198,848.00	198,848.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00										0.00	0.00
Exp Lrng Opp Program	8590													172,586.00	172,586.00
Other	8590												11,629.00	46,617.00	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			833.33	833.33	833.33			48,155.12	(0.00)	5,000.00
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	5,000.00	4,000.00				(47,970.12)	0.00	52,500.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	14,000.00	14,000.00	14,000.00	14,000.00	14,000.00	12,206.57	0.00	210,000.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,026.48	800.00	800.00	800.00	800.00	800.00	751.57	0.00	7,500.00
Selma	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	45,000.00	45,000.00	45,000.00	45,000.00	45,398.00	0.00	463,040.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	904,854.69	1,373,589.29	415,931.16	1,212,403.75	484,853.82	444,564.47	1,087,551.26	1,388,204.06	10,173,567.00
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	339,677.73	339,677.73	339,677.73	339,677.73	339,677.73	481,949.21	0.00	3,827,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	202,840.45	202,840.45	202,840.45	202,840.45	202,840.45	348,938.76	0.00	2,351,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	145,745.20	145,745.20	145,745.20	145,745.20	145,745.20	388,952.72	0.00	1,787,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	85,000.00	85,000.00	85,000.00	85,000.00	85,000.00	28,418.49	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	125,000.00	125,000.00	125,000.00	125,000.00	125,000.00	75,304.61	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	33,000.00	0.00	0.00	0.00	0.00	25,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	52,989.64	0.00	247,379.00
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	948,935.14	915,935.14	915,935.14	915,935.14	915,935.14	1,401,918.43		10,617,279.89
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,335.25	424,654.15	(500,003.98)	296,468.61	(431,081.32)	(471,370.67)	(314,367.17)	1,388,204.06	(443,712.89)
Accruals Received		73,335.00		1,100,107.07											1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82								
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,379.49	5,646,033.64	5,146,029.66	5,442,498.27	5,011,416.94	4,540,046.27	4,225,679.10		

Great Valley Academy Salida
December 2021

	A Actual YTD Jul 21 - Dec 21	B Revised Budget YTD Jul 21 - Dec 21	C Estimated Balance of year Jan 22-Jun 22	D Revised Budget Balance of year Jan 22-Jun 22	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	3,403,680	3,403,680	3,762,859	3,762,859	7,646,195	7,166,539	7,166,539
8100 · Federal Revenue	197,700	197,700	736,003	736,003	974,454	933,703	933,703
8300 · Other State Revenues	-41,536	-41,536	833,702	833,702	598,889	792,166	792,166
8600 · Other Local Revenue	94,331	94,331	115,669	115,669	327,500	210,000	210,000
8700 · SELPA	228,124	228,124	200,287	200,287	428,411	428,411	428,411
Total Income	3,882,300	3,882,300	5,648,519	5,648,519	9,975,449	9,530,819	9,530,819
 Gross Profit	 3,882,300	 3,882,300	 5,648,519	 5,648,519	 9,975,449	 9,530,819	 9,530,819
Expense							
1000 · Certificated Salaries	1,496,997	1,496,997	2,154,130	2,154,129	3,663,528	3,651,126	3,651,126
2000 · Classified Salaries	804,040	804,040	1,068,623	1,068,624	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	684,855	684,855	946,530	946,531	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	433,586	433,586	420,509	420,509	967,595	854,095	854,095
5000 · Services & Other Operating Exp	653,521	653,521	629,815	629,814	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	179,220	179,220	214,692	214,692	393,912	393,912	393,912
Total Expense	4,311,532	4,311,532	5,472,986	5,472,986	9,816,985	9,784,518	9,784,518
 Net Ordinary Income	 -429,232	 -429,232	 175,533	 175,533	 158,464	 -253,699	 -253,699

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,788,498.56	3,574,799.01	3,502,844.89	3,333,062.19	3,122,263.50		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	513,143.73	445,381.45	445,381.45	445,381.45	445,381.45	445,381.45	0.00	5,701,597.00
EPA Funding	8012	0.00	0.00	42,546.00		0.00		37,054.67		37,054.67			37,054.66	0.00	153,710.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	200,016.18	94,020.56	96,326.45	96,326.45	96,326.45	96,326.45	96,326.45	1,175,257.00
Selpa Prop Tax	8097							67,987.50						67,987.50	135,975.00
Federal IDEA	8100-8299												0.00	115,665.00	115,665.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	68,189.94	33,500.00	33,500.00	33,500.00	34,094.97	33,417.18	(0.00)	375,044.68
Title 1	8290				0.00								74,205.00	0.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			16,660.64	102,384.88		102,384.88				105,160.85	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	3,054.54	1,300.00	1,300.00	1,300.00	1,300.00	699.48	0.00	19,000.00
Educator Effectiveness	8550														218,436.00
Mandated Cost Reimb	8550							14,644.68					0.00	0.00	14,644.68
Lottery	8560							41,610.97			41,610.97			55,481.29	138,703.22
Lottery, prop 20	8561												0.00	55,311.10	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00									0.00	137,889.00	137,889.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00										0.00	0.00
Exp Lrng Opp Program	8590													144,827.00	144,827.00
Other	8590												0.00	58,355.00	58,355.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	800.00	400.00	400.00	400.00	400.00	400.00	53,781.68	5,000.00
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,666.67	16,666.67	16,666.67	16,666.67	16,666.67	16,666.67	7,176.08	200,000.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	800.00	800.00	800.00	800.00	800.00	4,492.57	0.00	10,000.00
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	35,700.92	35,700.92	35,700.92	35,700.92	35,700.92	21,782.41	0.00	428,411.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	806,680.17	186,135.88	1,281,842.56	1,102,054.67	627,769.60	769,515.04	671,686.46	630,670.46	730,425.87	897,960.96	9,530,818.93
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	321,362.06	321,362.06	321,362.06	321,362.06	321,362.06	547,319.59	0.00	3,651,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	164,592.04	164,592.04	164,592.04	164,592.04	164,592.04	245,663.26	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	139,252.38	139,252.38	139,252.38	139,252.38	139,252.38	250,268.55	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	80,632.89	80,632.89	80,632.89	80,632.89	80,632.89	17,344.59	0.00	854,094.70
Services & Other Operating Expense	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	105,759.79	105,759.79	105,759.79	105,759.79	105,759.79	101,015.67	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	65,342.11	0.00	393,912.00
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	841,469.15	841,469.15	841,469.15	841,469.15	841,469.15	1,265,640.17		9,784,517.75
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	63,290.15	(588,846.46)	430,890.31	260,585.51	(213,699.56)	(71,954.12)	(169,782.70)	(210,798.69)	(535,214.29)	897,960.96	(253,698.82)
Accruals Received		25,326.89	55,932.54	2,082,840.92	68,009.97										2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,788,498.56	3,574,799.01	3,502,844.89	3,333,062.19	3,122,263.50	2,587,049.20		

GREAT VALLEY ACADEMY
Regular Meeting of the Board of Trustees
February 28, 2022- 5:30 p.m.

-Via Zoom-

This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.

The Board of Directors ("Board") and employees of Great Valley academy shall meet via Zoom meeting platform. Members of the public who wish to access this Board meeting may do so at

<https://us02web.zoom.us/j/82438474574?pwd=RH0dGtMS2xHKzQzUzBMR3puTm4wZz09>

You may also call in using the Zoom phone number +1 669 900 6833 US Meeting ID **82438474574**.

Members of the public who wish to comment during the Board meeting may email in comments to publiccomment@greatvalleyacademy.com and they will be read during the public participation segment of the meeting. Comments must be received by 12:00 p.m. on the day of the meeting. Members of the public calling in will be given the opportunity to address the Board during the public participation segment of the meeting. Individual comments will be limited to three (3) minutes. The Board may limit the total time for public comment to a reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Access to Board Materials: You may request a copy of the written materials submitted to the Board by sending a request to publiccomment@greatvalleyacademy.com.

Disability Access: A copy for disability-related modifications or accommodations to participate in this public meeting should be made at least 24 hours prior to the meeting by emailing publiccomment@greatvalleyacademy.com. Efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the Americans with Disabilities Act.

AGENDA

a. CALL TO ORDER

b. COMMUNICATIONS

a. WRITTEN COMMUNICATIONS

i. Nigro & Nigro 2021 Audit Letter

b. PUBLIC PARTICIPATION

c. MODESTO PRINCIPAL REPORT

d. SALIDA PRINCIPAL REPORT

e. HOMESCHOOL PRINCIPAL REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

c. APPROVAL OF AGENDA AND ORDER OF AGENDA

d. CONSENTAGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the minutes of the Regular Board Meeting of January 31, 2022
- b. Approve Modesto 2nd Interims
- c. Approve Salida 2nd Interims

e. ACTION ITEMS

- a. Approval of 2022-2023 SCOE Master Agreement
- b. Approval of Updated Covid Safety Plan
- c. Approval to update Covid Safety Plan to reflect the most recent California Department of Public Health (CDPH) K-12 schools guidance (as it is released)
- d. Approval to change March Board Meeting date from Monday March 28th to Tuesday March 29th at 5:30 p.m.

f. INFORMATION AND DISCUSSION

- a. Monthly Financials
- b. Modesto LCAP supplement
- c. Salida LCAP supplement

g. FUTURE AGENDA ITEMS

a. FUTURE REGULAR BOARD MEETINGS – March 29, 2022 (Pending Board Approval)

~1209 Woodrow Ave. Suite A4 Modesto, 5:30 p.m.

h. CLOSED SESSION

- a. Public Employment
Title: Chief Executive Officer

i. ADJOURNMENT

VISION

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

MISSION

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Jan. 24- Feb. 18

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	81.33	88.78	79.396	87.65
1	73	69.333	90.59	69.045	88.71
2	80	76.533	86.59	77.945	89.75
3	92	88.266	85.21	88.522	89.39
4	91	86.266	83.88	85.927	89.41
5	73	68.866	89.76	70.720	88.84
6	93	87.800	85.57	85.684	88.29
7	101	95.733	87.12	96.081	90.48
8	72	68.000	88.88	71.081	91.65
Total	760	722.133	87.19	724.405	89.35

2. Key Accomplishments:

Clubs

40 Book Challenge (109 students have meet 40 books)

Live Broadcast of Assemblies- student run

Spirit Days- Sports Day

Continued Yearlong SCOE Math Trainings, RAMP Assessment Alignment/Review

Continued Yearlong SCOE Science Trainings, Grade Level Planning Sessions

Site Safety Initiative/Multi Campus/Urban Readiness Group

TOPS Safety Kits purchased

Teacher In Service Day- Staff Community Building

NWEA Testing

Lion Dance Performance

Outdoor Classroom

3. Upcoming Key Events/Activities:

Lottery for Enrollment 22-23

Spirit Day- Mar. 2 Read Across America

Enrollment Meetings- In Person and Zoom

In Person- Staff Meetings

SCOE Math Walks

Book Bags for K-3 students

Jog-A-Thon- May

Great Valley Academy Salida

Charter School Monthly Summary Report

January 31, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Feb dates are 02/1-02/23 YTD 08/10-02/23

Grade	Enrollment	ADA	ADA %	YTD ADA	ADA
K	80	74.73	92.39	74.55	88.56
1	95	90.07	93.22	90.51	89.35
2	89	82.60	91.91	82.63	89.50
3	100	92.87	91.40	91.59	89.47
4	86	77.60	88.84	80.20	89.08
5	90	85.47	93.08	86.83	89.49
6	90	82.53	88.14	84.84	90.02
7	81	72.07	88.72	72.60	88.91
8	81	74.33	91.76	72.78	88.79
Total	792	732.27	91.08	736.52	89.26

2. Key Accomplishments:

- a. Enrollment meetings concluded
- b. Book drive to move GVA Salida Library forward
- c. ELPAC testing
- d. February 4th: Spirit Day – Team Colors
- e. February 4th: Market Day (lower grades)
- f. February 11th: Market Day (upper grades)
- g. February 14th: Teacher in-service – Site safety
- h. February 21st: No school – Presidents Day
- i. February 25th: End of trimester 2

3. Upcoming Key Events/Activities:

- a. March 2nd – 9th: Lucky Grams fundraiser for drama

- b. March 4th: Enrollment lottery
- c. March 11th: Spirit Day – Favorite Character
- d. March 14th – 18th: Spring Break
- e. After school clubs to being after Spring Break

Great Valley Academy Homeschool

Charter School Monthly Summary Report

February 28, 2022

Reporting Dates: 1/4/2022-2/11/2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	8	7.8	98	7.2	99.6
1	10	9	90	9.3	95.6
2	9	6.6	92	6.1	96.4
3	2	1.6	80	1.9	95
4	11	9.5	100	9.7	99.9
5	5	5	100	3.9	100
6	8	7.2	91	6.5	94.2
7	8	5.3	81	5.3	92
8	8	6.9	94	7.2	97.9
Total	69	59	93	57.5	96.9

2. Key Accomplishments:

- a. February 1st—Homeschool Parent Orientation
- b. February 4th—NWEA Winter Testing ends
- c. February 4th—Field Trip – Castle Air Museum
- d. February 11th-- Assignment Work Record 6 Due
- e. February 11th, 18th, 25th -- GVS Staff Training with Dr. Rosenow
- f. February 1st—Homeschool Parent Orientation
- g. February 14th —Teacher In-Service
- h. February 24th—Enrichment Spirit Day – Dr. Seuss Day
- i. February 25th—Last day of Trimester 2

3. Upcoming Key Events/Activities:

- a. March 1st—Homeschool Parent Orientation
- b. March 4th, 11th, 18th-- GVS Staff Training with Dr. Rosenow
- c. March 9th--Trimester 2 Report Cards sent home
- d. March 10th-- Physical Fitness Testing - Conditioning Day
- e. March 11th—Assignment Work Record #8 due
- f. March 21-25th—Spring Break
- g. March 31st—Enrichment Spirit Day—College/Career Day; Physical Fitness Testing - Conditioning Day

Chief Operating Officer's Report
February 28, 2022
Board Meeting



Process and Policy Updates

- ❖ Updating to New CDPH Isolation & Quarantine Guidelines – Complete
- ❖ Annual Civil Rights Reporting – Complete
- ❖ Develop Federal Funding Policies for Compliance – In Progress
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ National School Lunch Program Audit for Salida – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ GVA Marketing Focus Group Process – Complete
- ❖ Marketing Collateral for 2022 Enrollment Season – Complete
- ❖ Evaluate Additional Medical Benefit Options for Staff – In Progress
- ❖ Certificated Salary Schedule Analysis – In Progress
- ❖ Social Media Campaigns for 2022 Enrollment Season – In Progress
- ❖ Restructuring Kids' Care Programs – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Managing COVID contact tracing – Ongoing
- ❖ Launch of SchoolWise Parent Portal – April 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ January 2022
 - ❑ 3,360 Users Visited (94% New/6% Returning)
 - ❑ 10,692 Page Views
 - ❑ Users Averaged 1:42 Minutes on the Site
 - ❑ 59.29% Mobile – 39.4% Desktop – 1.31% Tablet
 - ❑ Type: Organic 59.7% – Direct 26.0% – Referral 1.7% – Social 12.6%

Training

- ❖ CalPADS & CalSAAS Assignment Webinar – Complete
- ❖ Governor's Budget Workshop – May 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing

Chief Executive Officer's Report
February 28, 2022
Board Meeting



State Accountability

- No data available (no testing 2020/21)
- NWEA data coming in Spring

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021 (virtual attendance)
- Governor's budget virtual conference: January 2022 + May 2022

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program-good participation
 - Intentional outreach to prior families-some response
 - Marketing collateral, delivered to area preschools
 - Enrollment meetings in progress-Lottery March 4th, 2022



Homeschool

- Ongoing support of 'new' principal
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved February 22, 2021



Founders Report
Great Valley Academy School Board
February 28, 202

The Great Valley Smart staff have done a wonderful job covering for each other when someone is absent and being flexible when student group sizes change.

Vision screenings for staff and on campus students continue to be done on a weekly basis. I am continuing to see more evidence of the visual dysfunctions in young children. I believe these problems are the result of a year and a half of emotional and physical stress.

We have been working closely with the home school staff and families. We have been doing weekly staff trainings. As a result I have been able to do visual evaluations on more of the home school students and, when necessary, we have placed some of them into the GVS intervention program.

Trainings have continued with the GVS staff and they continue to gain more knowledge in how to improve visual skills in GVA students.

I am pleased with the progress of the GVS staff to eventually do student evaluations and to establish training programs for students that need GVS intervention. They can also aid teachers in understanding the importance of visual skills for successful learning.

Eldon Rosenow, Founder

**GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
January 31, 2022**

MINUTES

Members Present: Steve Payne, Twila Tosh, Vince Jamison, Susan Nisan

Members Absent: Yolanda Meraz

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Mike Ruehle, Russ Howell, Tarah Heilman, Dr. Eldon Rosenow, Kelli Rupe, Megan Barajas, Crystal Tanaka

Audience Present: Several parents and/or community members

Call to Order: Mr. Payne welcomed everyone and called the meeting to order at 5:30 p.m.

Communications: **COMMUNICATIONS**

Written

Communications: Mr. Payne read a letter to the Board from Nolan and Shannda Ortiz.

Public Participation: A couple of parents raised concerns and had questions regarding the mask mandate and there was a comment of support for GVA teachers and administrators as well as thanks from another.

Modesto Principal

Report: Mr. Ruehle talked about the site safety training that was held on campus. The trainers gave guidance on safety improvements that could be made on campus as well as training with all staff members.

Salida Principal

Report: Mr. Howell talked about recent ELPAC test results.

Homeschool Principal

Report: Mrs. Heilman gave an update on the GVS trainings given to homeschool staff by Dr. Rosenow.

Chief Operating

Officer's Report: Mrs. Meeks talked about enrollment meetings and marketing done in regards to them.

MINUTES

Regular Meeting of the Board

January 31, 2022

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Chief Executive

Officer's Report:

Ms. Silvestre Franklin expressed her gratitude to the many people at GVA that are going above and beyond working 6 days a week on COVID tracking and notifications.

Founder's Report:

Dr. Rosenow talked about working with the Homeschool staff.

Approval of Agenda/

Order of Agenda:

The motion was made by Mr. Jamison, seconded by Ms. Tosh, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

Action Items:

ACTION ITEMS

a. The motion was made by Ms. Tosh, seconded by Mrs. Nisan approving the Updated Modesto 2021-2022 Academic Calendar. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

January 31, 2022

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b. The motion was made by Mrs. Nisan, seconded by Mr. Payne approving the Updated Salida 2021-2022 Academic Calendar. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

c. The motion was made by Ms. Tosh, seconded by Mr. Payne approving the Updated 2021-2022 GVA Classified Holiday Schedule. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

d. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Form 990's. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

e. The motion was made by Ms. Tosh, seconded by Mrs. Nisan approving the revised COVID Safety Plan. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

f. The motion was made by Mr. Jamison, seconded by Mr. Payne approving the 401(k) Formal Record of Action. A roll call vote was taken.

AYES: Payne, Tosh, Nisan, Jamison

NOES: None

ABSENT: Meraz

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

January 31, 2022

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Information and

Discussion:

Monthly Financials

Financials strong for both campuses.

Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting –

Monday February 28, 2022

~5:30 p.m. Via Zoom

Adjournment:

The meeting was adjourned at 6:23 p.m.

Great Valley Academy-Modesto Campus
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED & RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	8,290,756	7,389,647	3,876,199	7,389,647
2) Federal Revenue	8100-8299	1,300,605	1,125,113	294,623	1,125,113
3) Other State Revenue	8300-8599	630,743	925,767	507,389	925,767
4) Other Local Revenue	8600-8799	921,540	733,040	485,790	733,040
5) TOTAL REVENUES		11,143,644	10,173,567	5,164,001	10,173,567
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,906,294	3,827,292	1,963,841	3,827,292
2) Classified Salaries	2000-2999	2,231,245	2,351,476	1,146,426	2,351,476
3) Employee Benefits	3000-3999	1,705,219	1,787,678	812,489	1,787,678
4) Books and Supplies	4000-4999	1,100,130	962,630	581,206	962,630
5) Services & Other Operating Exp	5000-5999	1,740,136	1,365,125	744,727	1,365,125
6) Capital Outlay	6000-6999	78,000	75,700	17,335	75,700
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299	247,379	247,379	123,702	247,379
	7400-7499	0	0	0	0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		11,008,403	10,617,280	5,389,726	10,617,280
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)		135,241	(443,713)	(225,725)	(443,713)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses					
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	0	0	0	0
4) TOTAL, OTHER FINANCING SOURCES/USES		0	0	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		135,241	(443,713)	(225,725)	(443,713)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	8,649,664	8,649,664		8,649,664
b) Audit Adjustments	9793	1,600	1,600		1,600
c) As of July 1, Audited (F1a + F1b)		8,651,264	8,651,264		8,651,264
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		8,651,264	8,651,264		8,651,264
2) Ending Balance, June 30 (E + F1e)		8,786,505	8,207,551		8,207,551

Great Valley Academy-Modesto Campus
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	8,149,106	7,247,997	3,876,199	7,247,997
2) Federal Revenue	8100-8299	0	0	0	0
3) Other State Revenue	8300-8599	153,247	164,743	79,308	164,743
4) Other Local Revenue	8600-8799	458,500	270,000	248,148	270,000
5) TOTAL REVENUES		8,760,853	7,682,740	4,203,655	7,682,740
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,183,935	3,104,933	1,741,335	3,104,933
2) Classified Salaries	2000-2999	1,571,767	1,691,998	930,721	1,691,998
3) Employee Benefits	3000-3999	1,490,853	1,573,312	702,211	1,573,312
4) Books and Supplies	4000-4999	251,444	113,944	198,670	113,944
5) Services & Other Operating Exp	5000-5999	687,994	312,983	428,897	312,983
6) Capital Outlay	6000-6999	78,000	75,700	17,335	75,700
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	212,052 0	212,052 0	123,702 0	212,052 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		7,476,045	7,084,922	4,142,871	7,084,922
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)		1,284,808	597,818	60,784	597,818
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	(1,382,605)	(762,318)	0	(762,318)
4) TOTAL, OTHER FINANCING SOURCES/USES		(1,382,605)	(762,318)	0	(762,318)
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		(97,797)	(164,500)	60,784	(164,500)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	8,370,451	8,370,451		8,370,451
b) Audit Adjustments	9793	1,600	1,600		1,600
c) As of July 1, Audited (F1a + F1b)		8,372,051	8,372,051		8,372,051
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		8,372,051	8,372,051		8,372,051
2) Ending Balance, June 30 (E + F1e)		8,274,254	8,207,551		8,207,551

Great Valley Academy-Modesto Campus
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	141,650	141,650	0	141,650
2) Federal Revenue	8100-8299	1,300,605	1,125,113	294,623	1,125,113
3) Other State Revenue	8300-8599	477,496	761,024	428,081	761,024
4) Other Local Revenue	8600-8799	463,040	463,040	237,642	463,040
5) TOTAL REVENUES		2,382,791	2,490,827	960,346	2,490,827
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	722,359	722,359	222,506	722,359
2) Classified Salaries	2000-2999	659,478	659,478	215,705	659,478
3) Employee Benefits	3000-3999	214,366	214,366	110,278	214,366
4) Books and Supplies	4000-4999	848,686	848,686	382,536	848,686
5) Services & Other Operating Exp	5000-5999	1,052,142	1,052,142	315,830	1,052,142
6) Capital Outlay	6000-6999	0	0	0	0
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	35,327 0	35,327 0	0 0	35,327 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		3,532,358	3,532,358	1,246,855	3,532,358
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		(1,149,567)	(1,041,531)	(286,509)	(1,041,531)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	1,382,605	762,318	0	762,318
4) TOTAL, OTHER FINANCING SOURCES/USES		1,382,605	762,318	0	762,318
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		233,038	(279,213)	(286,509)	(279,213)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	279,213	279,213		279,213
b) Audit Adjustments	9793	0	0		0
c) As of July 1, Audited (F1a + F1b)		279,213	279,213		279,213
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		279,213	279,213		279,213
2) Ending Balance, June 30 (E + F1e)		512,251	0		0

FISCAL YEAR 2021-2024

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GENERAL FUND FINANCIAL PROJECTIONS

Great Valley AcademyModesto

		FISCAL YEAR 2021-2022				FISCAL YEAR 2022-23				FISCAL YEAR 2023-24			
		SOURCE FOR PROJECTION				BUDGET				PROJECTION			
Description	Account Codes	Projection Factors	Unrestr. 21-22	Restr 21-22	Total 21-22	Projection Factors	Unrestr. 22-23	Restr 22-23	Total 22-23	Projection Factors	Unrestr. 23-24	Restr 23-24	Total 23-24
			1st Yr. Proj.	1st Yr. Proj.	1st Yr. Proj.		2nd Yr. Proj.	2nd Yr. Proj.	2nd Yr. Proj.		3rd Yr. Proj.	3rd Yr. Proj.	3rd Yr. Proj.
Fund Balance-July 1 Estimated			\$8,370,451	\$279,213	\$8,649,664		\$8,207,551	\$0	\$8,207,551		\$8,430,327	\$0	\$8,430,327
Unaudited Actual Adjustments			\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
July 1 Unaudited	9791		\$8,370,451	\$279,213	\$8,649,664		\$8,207,551	\$0	\$8,207,551		\$8,430,327	\$0	\$8,430,327
Audit Adjustments	9793		\$1,600	\$0	\$1,600		\$0	\$0	\$0		\$0	\$0	\$0
Adjustment for Restatements	9795		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Net Beginning Balance			\$8,372,051	\$279,213	\$8,651,264		\$8,207,551	\$0	\$8,207,551		\$8,430,327	\$0	\$8,430,327
Revenue Limit Sources	8010-8099	see notes	\$7,247,997	\$141,650	\$7,389,647	see notes	\$8,528,263	\$140,000	\$8,668,263	see notes	\$8,759,965	\$140,000	\$8,899,965
Federal Revenues	8100-8299	see notes	\$0	\$1,125,113	\$1,125,113	see notes	\$0	\$1,494,954	\$1,494,954	see notes	\$0	\$827,449	\$827,449
Other State Revenues	8300-8599	see notes	\$164,743	\$761,024	\$925,767	see notes	\$138,769	\$60,311	\$199,080	see notes	\$161,491	\$64,223	\$225,714
Other Local Revenues	8600-8799	see notes	\$270,000	\$463,040	\$733,040	see notes	\$464,800	\$450,000	\$914,800	see notes	\$464,800	\$450,000	\$914,800
Total Operating Revenues			\$7,682,740	\$2,490,827	\$10,173,567		\$9,131,832	\$2,145,265	\$11,277,097		\$9,386,256	\$1,481,672	\$10,867,928
Certificated Salaries	1000-1999	see notes	\$3,104,933	\$722,359	\$3,827,292	see notes	\$3,223,444	\$715,925	\$3,939,369	see notes	\$3,316,344	\$589,612	\$3,905,956
Classified Salaries	2000-2999	see notes	\$1,691,998	\$659,478	\$2,351,476	see notes	\$1,721,767	\$675,558	\$2,397,325	see notes	\$1,757,313	\$617,459	\$2,374,772
Employee Benefits	3000-3999	see notes	\$1,573,312	\$214,366	\$1,787,678	see notes	\$1,645,254	\$306,496	\$1,951,750	see notes	\$1,716,403	\$270,700	\$1,987,103
Books and Supplies	4000-4999	see notes	\$213,944	\$748,686	\$962,630	see notes	\$260,488	\$724,062	\$984,550	see notes	\$310,550	\$673,000	\$983,550
Services, Other Operating	5000-5999	see notes	\$312,983	\$1,052,142	\$1,365,125	see notes	\$323,249	\$1,073,526	\$1,396,775	see notes	\$344,780	\$1,054,312	\$1,399,092
Capital Outlay	6000-6999	see notes	\$75,700	\$0	\$75,700	see notes	\$57,500	\$0	\$57,500	see notes	\$57,500	\$0	\$57,500
Other Outgo	7100-7299 7400-7499	see notes	\$212,052	\$35,327	\$247,379	see notes	\$212,052	\$115,000	\$327,052	see notes	\$227,052	\$115,000	\$342,052
Direct Support/Indirect Costs	7300-7399		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Total Operating Expenditures			\$7,184,922	\$3,432,358	\$10,617,280		\$7,443,754	\$3,610,567	\$11,054,321		\$7,729,942	\$3,320,083	\$11,050,025
Operating Excess (Deficit)			\$497,818	(\$941,531)	(\$443,713)		\$1,688,078	(\$1,465,302)	\$222,776		\$1,656,314	(\$1,838,411)	(\$182,097)
Transfers In	8910-8929		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Transfers Out	7600-7629		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Sources	8930-8979		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Uses	7630-7699		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Long Term Liability	9660-9669		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Contrib. to Restricted Program	8980-8999		(\$662,318)	\$662,318	\$0		(\$1,465,302)	\$1,465,302	\$0		(\$1,838,411)	\$1,838,411	\$0
Net Increase (Decrease) to Fund Balance			(\$164,500)	(\$279,213)	(\$443,713)		\$222,776	\$0	\$222,776		(\$182,097)	\$0	(\$182,097)
Ending Fund Balance			\$8,207,551	\$0	\$8,207,551		\$8,430,327	\$0	\$8,430,327		\$8,248,230	\$0	\$8,248,230
Recommended Reserve (Unr)	3.00%		\$230,482				\$273,955				\$281,588		
Reserve			\$8,207,551				\$8,430,327				\$8,248,230		
Reserve %			77.30%				76.26%				74.64%		

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

In November 2021, the GVA School Board approved the most current budget reflected in the 2nd interims and MYP. This budget reflects a 97.85 student reduction in ADA for 21-22. A revised 21/22 budget is scheduled for approval in either March or April 2022 that will provide a better picture of the YE budget forecasting with planned improvement to the bottom line. Additionally, GVA plans to utilize \$202,252 of previous year ELOG funds from reserve for 21/22.

Additionally, current legislation does not provide charter schools with hold harmless for the decline in ADA. Proposed legislation is scheduled to be reviewed prior to June 30, 2022 that may provide charter schools with a hold harmless or other reprieve in declining ADA impact.

2021-2022

UNRESTRICTED

REVENUES:

- 8010-8099 22.2a version LCFF revenue is based on 781.85 ADA and 38.5% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299 No unrestricted federal programs
- 8300-8599 State Lottery projection of 886.43 ADA @ \$150
- 8600-8799 Revenue projection of Kids Care Fees and Fundraising returns to 2019/20 experience

EXPENDITURES:

- 1000-1999 Salaries based on 2020/21 plus 3% increase
- 2000-2999 Salaries based on 2020/21 plus 3% increase
- 3000-3999 Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999 Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999 Assumes minimal increase in expenses with SpED expense increase
- 6000-6999 Assumes minimal facilities upgrades
- 7300-7399 Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999 Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099 Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections
- 8100-8299 Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections and Federal Food Program, ESSER Funds
- 8300-8599 Revenue assumes Restricted Lottery based on 886.43 ADA @ \$49 and State Food Program and IPI/ELO Funds
- 8600-8799 Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections

EXPENDITURES:

- 1000-1999 Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999 Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999 Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999 Assumes purchase of materials for Special Ed Services
- 5000-5999 Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999 Assumes no continued expenditures in this category
- 7100-7299/
- 7400-7499 SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399 Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999 Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2022-2023

UNRESTRICTED

REVENUES:

- 8010-8099** 22.2a version LCFF revenue is based on 902.5 ADA and 33.3% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 781.85 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2021/22 plus 3% increase
- 2000-2999** Salaries based on 2021/22 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase and ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 781.5 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2023-2024

UNRESTRICTED

REVENUES:

- 8010-8099** 22.2a version LCFF revenue is based on 902.5 ADA and 36.8% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 902.5 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses - Reduction of LLMF expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase
- 8300-8599** Revenue assumes Restricted Lottery based on 902.5 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees - Reduction of LLMF expenses
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

Great Valley Academy-Salida
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED & RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	7,646,195	7,166,539	3,583,501	7,166,539
2) Federal Revenue	8100-8299	974,454	933,703	261,702	933,703
3) Other State Revenue	8300-8599	598,889	792,166	400,907	792,166
4) Other Local Revenue	8600-8799	755,911	638,411	340,994	638,411
5) TOTAL REVENUES		9,975,449	9,530,819	4,587,104	9,530,819
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,663,528	3,651,126	1,834,010	3,651,126
2) Classified Salaries	2000-2999	1,843,431	1,872,664	954,630	1,872,664
3) Employee Benefits	3000-3999	1,601,402	1,631,386	773,970	1,631,386
4) Books and Supplies	4000-4999	967,595	854,095	494,716	854,095
5) Services & Other Operating Exp	5000-5999	1,269,117	1,283,335	731,632	1,283,335
6) Capital Outlay	6000-6999	78,000	83,000	59,314	83,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	393,912 0	408,912 0	209,090 0	408,912 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		9,816,985	9,784,518	5,057,362	9,784,518
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)		158,464	(253,699)	(470,258)	(253,699)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses					
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	0	0	0	0
4) TOTAL, OTHER FINANCING SOURCES/USES		0	0	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		158,464	(253,699)	(470,258)	(253,699)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	7,242,283	7,242,283		7,242,283
b) Audit Adjustments	9793	51,170	51,170		51,170
c) As of July 1, Audited (F1a + F1b)		7,293,453	7,293,453		7,293,453
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		7,293,453	7,293,453		7,293,453
2) Ending Balance, June 30 (E + F1e)		7,451,917	7,039,754		7,039,754

Great Valley Academy-Salida
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

UNRESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	7,510,220	7,030,564	3,583,501	7,030,564
2) Federal Revenue	8100-8299	0	0	0	0
3) Other State Revenue	8300-8599	158,449	169,511	76,237	169,511
4) Other Local Revenue	8600-8799	327,500	210,000	112,870	210,000
5) TOTAL REVENUES		7,996,169	7,410,075	3,772,608	7,410,075
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	3,045,186	3,032,784	1,645,830	3,032,784
2) Classified Salaries	2000-2999	1,490,181	1,519,414	865,294	1,519,414
3) Employee Benefits	3000-3999	1,381,448	1,411,432	715,470	1,411,432
4) Books and Supplies	4000-4999	366,543	253,043	127,924	253,043
5) Services & Other Operating Exp	5000-5999	506,895	521,113	366,661	521,113
6) Capital Outlay	6000-6999	78,000	83,000	59,314	83,000
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299 7400-7499	360,000 0	375,000 0	209,090 0	375,000 0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		7,228,253	7,195,786	3,989,583	7,195,786
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		767,916	214,289	(216,975)	214,289
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	(901,263)	(423,535)	0	(423,535)
4) TOTAL, OTHER FINANCING SOURCES/USES		(901,263)	(423,535)	0	(423,535)
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		(133,347)	(209,246)	(216,975)	(209,246)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	6,997,641	6,997,641		6,997,641
b) Audit Adjustments	9793	51,170	51,170		51,170
c) As of July 1, Audited (F1a + F1b)		7,048,811	7,048,811		7,048,811
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		7,048,811	7,048,811		7,048,811
2) Ending Balance, June 30 (E + F1e)		6,915,464	6,839,565		6,839,565

Great Valley Academy-Salida
2021-2022 Second Interim
General Fund
Revenues, Expenditures, and Changes in Fund Balance

RESTRICTED

Description	Object Codes	Original Budget (A)	Board Appr'd Operating Budget (B)	Actuals To Date (C)	Projected Yr Totals (D)
A. REVENUES					
1) Revenue Limit Sources	8010-8099	135,975	135,975	0	135,975
2) Federal Revenue	8100-8299	974,454	933,703	261,702	933,703
3) Other State Revenue	8300-8599	440,440	622,655	324,670	622,655
4) Other Local Revenue	8600-8799	428,411	428,411	228,124	428,411
5) TOTAL REVENUES		1,979,280	2,120,744	814,496	2,120,744
B. EXPENDITURES					
1) Certificated Salaries	1000-1999	618,342	618,342	188,180	618,342
2) Classified Salaries	2000-2999	353,250	353,250	89,336	353,250
3) Employee Benefits	3000-3999	219,954	219,954	58,500	219,954
4) Books and Supplies	4000-4999	601,052	601,052	366,792	601,052
5) Services & Other Operating Exp	5000-5999	762,222	762,222	364,971	762,222
6) Capital Outlay	6000-6999	0	0	0	0
7) Other Outgo (excluding Transfers of Indirect/ Direct Support Costs)	7100-7299	33,912	33,912	0	33,912
	7400-7499	0	0	0	0
8) Transfers of Indirect/Direct Support Costs	7300-7399	0	0	0	0
9) TOTAL EXPENDITURES		2,588,732	2,588,732	1,067,779	2,588,732
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B9)					
		(609,452)	(467,988)	(253,283)	(467,988)
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In	8910-8929	0	0	0	0
b) Transfers Out	7610-7629	0	0	0	0
2) Other Sources/Uses		0	0	0	0
a) Sources	8930-8979	0	0	0	0
b) Uses	7630-7699	0	0	0	0
3) Contributions	8980-8999	901,263	423,535		423,535
4) TOTAL, OTHER FINANCING SOURCES/USES		901,263	423,535	0	423,535
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)					
		291,811	(44,453)	(253,283)	(44,453)
F. FUND BALANCE, RESERVES					
1) Beginning Fund Balance					
a) As of July 1 - Unaudited	9791	244,642	244,642		244,642
b) Audit Adjustments	9793	0	0		0
c) As of July 1, Audited (F1a + F1b)		244,642	244,642		244,642
d) Other Restatements	9795	0	0		0
e) Adjusted Beginning Balance (F1c+F1d)		244,642	244,642		244,642
2) Ending Balance, June 30 (E + F1e)		536,453	200,189		200,189

FISCAL YEAR 2021-2024

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GENERAL FUND FINANCIAL PROJECTIONS

Great Valley Academy

Salida

		FISCAL YEAR 2021-22				FISCAL YEAR 2022-23				FISCAL YEAR 2023-24			
		ESTIMATED		SOURCE FOR PROJECTION		BUDGET		SOURCE FOR PROJECTION		PROJECTION		SOURCE FOR PROJECTION	
Description	Account Codes	Projection Factors	Unrestr. 21-22 1st Yr. Proj.	Restr 21-22 1st Yr. Proj.	Total 21-22 1st Yr. Proj.	Projection Factors	Unrestr. 22-23 2nd Yr. Proj.	Restr 22-23 2nd Yr. Proj.	Total 22-23 2nd Yr. Proj.	Projection Factors	Unrestr. 23-24 3rd Yr. Proj.	Restr 23-24 3rd Yr. Proj.	Total 23-24 3rd Yr. Proj.
Fund Balance-July 1 Estimated			\$6,997,641	\$244,642	\$7,242,283		\$7,039,754	\$0	\$7,039,754		\$7,131,202	\$0	\$7,131,202
Unaudited Actual Adjustments			\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
July 1 Unaudited	9791		\$6,997,641	\$244,642	\$7,242,283		\$7,039,754	\$0	\$7,039,754		\$7,131,202	\$0	\$7,131,202
Audit Adjustments	9793		\$51,170	\$0	\$51,170		\$0	\$0	\$0		\$0	\$0	\$0
Adjustment for Restatements	9795		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Net Beginning Balance			\$7,048,811	\$244,642	\$7,293,453		\$7,039,754	\$0	\$7,039,754		\$7,131,202	\$0	\$7,131,202
Revenue Limit Sources	8010-8099	see notes	\$7,030,564	\$135,975	\$7,166,539	see notes	\$7,986,436	\$135,000	\$8,121,436	see notes	\$8,223,926	\$135,000	\$8,358,926
Federal Revenues	8100-8299	see notes	\$0	\$933,703	\$933,703	see notes	\$0	\$1,042,743	\$1,042,743	see notes	\$0	\$628,832	\$628,832
Other State Revenues	8300-8599	see notes	\$169,511	\$622,655	\$792,166	see notes	\$133,840	\$56,659	\$190,499	see notes	\$148,803	\$60,895	\$209,698
Other Local Revenues	8600-8799	see notes	\$210,000	\$428,411	\$638,411	see notes	\$306,000	\$415,000	\$721,000	see notes	\$331,750	\$415,000	\$746,750
Total Operating Revenues			\$7,410,075	\$2,120,744	\$9,530,819		\$8,426,276	\$1,649,402	\$10,075,678		\$8,704,479	\$1,239,727	\$9,944,206
Certificated Salaries	1000-1999	see notes	\$3,032,784	\$618,342	\$3,651,126	see notes	\$3,087,292	\$671,343	\$3,758,635	see notes	\$3,171,555	\$550,053	\$3,721,608
Classified Salaries	2000-2999	see notes	\$1,519,414	\$353,250	\$1,872,664	see notes	\$1,532,233	\$381,161	\$1,913,394	see notes	\$1,582,211	\$324,151	\$1,906,362
Employee Benefits	3000-3999	see notes	\$1,411,432	\$219,954	\$1,631,386	see notes	\$1,485,355	\$302,167	\$1,787,522	see notes	\$1,543,323	\$275,513	\$1,818,836
Books and Supplies	4000-4999	see notes	\$253,043	\$601,052	\$854,095	see notes	\$275,931	\$476,819	\$752,750	see notes	\$292,231	\$460,519	\$752,750
Services, Other Operating	5000-5999	see notes	\$521,113	\$762,222	\$1,283,335	see notes	\$578,481	\$710,448	\$1,288,929	see notes	\$628,784	\$677,054	\$1,305,838
Capital Outlay	6000-6999	see notes	\$83,000	\$0	\$83,000	see notes	\$88,000	\$0	\$88,000	see notes	\$103,000	\$0	\$103,000
Other Outgo	7100-7299 7400-7499	see notes	\$375,000	\$33,912	\$408,912	see notes	\$360,000	\$35,000	\$395,000	see notes	\$360,000	\$35,000	\$395,000
Direct Support/Indirect Costs	7300-7399		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Total Operating Expenditures			\$7,195,786	\$2,588,732	\$9,784,518		\$7,407,292	\$2,576,938	\$9,984,230		\$7,681,104	\$2,322,290	\$10,003,394
Operating Excess (Deficit)			\$214,289	(\$467,988)	(\$253,699)		\$1,018,984	(\$927,536)	\$91,448		\$1,023,375	(\$1,082,563)	(\$59,188)
Transfers In	8910-8929		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Transfers Out	7600-7629		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Sources	8930-8979		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Uses	7630-7699		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Long Term Liability	9660-9669		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0	\$0
Contrib. to Restricted Program	8980-8999		(\$223,346)	\$223,346	\$0		(\$927,536)	\$927,536	\$0		(\$1,082,563)	\$1,082,563	\$0
Net Increase (Decrease) to Fund Balance			(\$9,057)	(\$244,642)	(\$253,699)		\$91,448	\$0	\$91,448		(\$59,188)	\$0	(\$59,188)
Ending Fund Balance			\$7,039,754	\$0	\$7,039,754		\$7,131,202	\$0	\$7,131,202		\$7,072,014	\$0	\$7,072,014
Recommended Reserve (Unr)	3.00%				\$222,302				\$252,788				\$261,134
Reserve					\$7,039,754				\$7,131,202				\$7,072,014
Reserve %					71.95%				71.42%				70.70%

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

In November 2021, the GVA School Board approved the most current budget reflected in the 2nd interims and MYP. This budget reflects a 56.05 student reduction in ADA for 21-22. A revised 21/22 budget is scheduled for approval in either March or April 2022 that will provide a better picture of the YE budget forecasting with planned improvement to the bottom line. Additionally, GVA plans to utilize \$200,189 of previous year ELOG funds from reserve for 21/22.

Additionally, current legislation does not provide charter schools with hold harmless for the decline in ADA. Proposed legislation is scheduled to be reviewed prior to June 30, 2022 that may provide charter schools with a hold harmless or other reprieve in declining ADA impact.

2021-2022

UNRESTRICTED

REVENUES:

- 8010-8099 22.2a version LCFF revenue is based on 768.55 ADA and 32.1% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299 No unrestricted federal programs
- 8300-8599 State Lottery projection of 850.94 ADA @ \$150
- 8600-8799 Revenue projection of Kids Care Fees and Fundraising returns to 2019/20 experience

EXPENDITURES:

- 1000-1999 Salaries based on 2020/21 plus 3% increase
- 2000-2999 Salaries based on 2020/21 plus 3% increase
- 3000-3999 Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999 Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999 Assumes minimal increase in expenses with SpED expense increase
- 6000-6999 Assumes minimal facilities upgrades
- 7300-7399 Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999 Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099 Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections
- 8100-8299 Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections and Federal Food Program, ESSER Funds
- 8300-8599 Revenue assumes Restricted Lottery based on 850.94 ADA @ \$49 and State Food Program and IPI/ELO Funds
- 8600-8799 Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections

EXPENDITURES:

- 1000-1999 Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999 Salaries based on 2020/2021 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999 Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999 Assumes purchase of materials for Special Ed Services
- 5000-5999 Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999 Assumes no continued expenditures in this category
- 7100-7299/
- 7400-7499 SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399 Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999 Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2022-2023

UNRESTRICTED

REVENUES:

- 8010-8099** 22.2a version LCFF revenue is based on 855 ADA and 32.1% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 768.55 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2021/22 plus 3% increase
- 2000-2999** Salaries based on 2021/22 plus 3% increase
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase and ESSER Funds
- 8300-8599** Revenue assumes Restricted Lottery based on 768.55 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 2000-2999** Salaries based on 2021/2022 plus 3% increase - includes add'l salaries towards ESSER funds
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

GREAT VALLEY ACADEMY:

Budget Assumptions for MYP

2023-2024

UNRESTRICTED

REVENUES:

- 8010-8099** 22.2a version LCFF revenue is based on 855 ADA and 32.1% unduplicated count (includes Charter in lieu tax amount)
- 8100-8299** No unrestricted federal programs
- 8300-8599** State Lottery projection of 855 ADA @ \$150
- 8600-8799** Revenue projection of Kids Care Fees and Fundraising based on 2021/22 projections

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes increase in medical & retirement benefits applicable to certificated and classified salaries
- 4000-4999** Assumes minimal increase in text books and instructional materials for additional students, replacement of consumables
- 5000-5999** Assumes minimal increase in expenses - Reduction of LLMF expenses
- 6000-6999** Assumes minimal facilities upgrades
- 7300-7399** Mortgage interest per amortization schedule

CONTRIBUTIONS TO RESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

RESTRICTED

REVENUES:

- 8010-8099** Revenue assumes SELPA Property Tax Transfer Per 2021/2022 SCOE Budget projections plus est. increase
- 8100-8299** Revenue assumes Federal IDEA SELPA income Per 2021/2022 SCOE Budget projections plus est. increase
- 8300-8599** Revenue assumes Restricted Lottery based on 855 ADA @ \$49
- 8600-8799** Revenue assumes SELPA Special Ed Funding Exhibit-PS/RS per 2021/2022 SCOE Budget projections plus est. increase

EXPENDITURES:

- 1000-1999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 2000-2999** Salaries based on 2022/23 plus 2% increase - Reduction of temporary LLMF staffing
- 3000-3999** Assumes medical and retirement benefits for resources applicable to certificated and classified salaries
- 4000-4999** Assumes purchase of materials for Special Ed Services
- 5000-5999** Assumes SCOE Individual Student Services and SELPA Administration Fees - Reduction of LLMF expenses
- 6000-6999** Assumes no continued expenditures in this category
- 7100-7299/**
- 7400-7499** SELPA Insurance Pool per 2021/2022 SCOE Budget projections plus increase
- 7300-7399** Assumes no continued expenditures in this category

CONTRIBUTIONS FROM UNRESTRICTED PROGRAMS:

- 8980-8999** Assumes covering special ed encroachment

Date: February 14, 2022

To: District Superintendents
Chief Business Officials
SCOE Managers

From: Julie A. Betschart, Deputy Superintendent, Business Services
RE: Charges for contract services for 2022-2023

The following rates for contracted services provided by the Stanislaus County Office of Education have been set for the 2022-2023 fiscal year. We have endeavored to contain costs wherever possible. Some increases may be necessary in order to partially cover costs.

All services, unless otherwise specified, are available to all districts, charters, and other schools. In order to avail yourselves of the services, the master agreement needs to be submitted prior to service use. Many services are available without subscription. There are specific services, however, where we need your best estimate of your contracted usage in the upcoming year to ensure that we have the appropriate amount of staffing available. Failure to accurately estimate need could mean that we will not be able to provide you with the service due to lack of appropriate staffing.

As always, we appreciate your dedication to the families in Stanislaus County as both employers and educators. We strive to provide the excellence of service that supports your dedication.

**DISTRICTS: PLEASE RETURN COMPLETED MASTER AGREEMENT
TO Veronica Garnica, ROUTE #000
PRIOR TO MARCH 18, 2022**

SCOE DEPARTMENTS INCLUDE IN BUDGET PACKET SUBMISSION

If you have changes to your Master Agreement after it's been submitted please request a Master Agreement Amendment from Veronica Garnica at 238-1914.

**STANISLAUS COUNTY OFFICE OF EDUCATION
2022-23
MASTER AGREEMENT**

This Agreement, by and between the Stanislaus County Superintendent of Schools, hereinafter referred to as SUPERINTENDENT and the following school district, hereinafter referred to as DISTRICT, or SCOE Department, hereinafter referred to as DEPARTMENT is for the services that are specific in this Agreement and in the attached appendices pursuant to the following terms and conditions.

District/Department: _____

1. SUPERINTENDENT will perform or make available to DISTRICT OR DEPARTMENT those services that are specified in the appropriate appendices.
2. DISTRICT or DEPARTMENT will pay SUPERINTENDENT for services provided according to this Agreement.
3. For DISTRICTS, for all services unless otherwise stipulated on the service specific page, SUPERINTENDENT will transfer funds from DISTRICT in January for July - December, based off of estimates. Final transfer for the year will occur in June. Final transfer will be based on final data and will be adjusted for payments previously made.
4. Unless otherwise stated on the service specific page, fees based on ADA will be based on P-2 ADA as certified @ P-2.
5. For DEPARTMENTS, funds will be transferred on a monthly/yearly basis for services provided to DEPARTMENT based on the service.
6. This Agreement is for the 2022-23 fiscal year.
7. All services in this Agreement are available to all DISTRICTS and/or DEPARTMENTS unless otherwise noted on service specific page or by separate notification/Agreement. Failure to subscribe for a service does not negate terms of Agreement should the DISTRICT or DEPARTMENT utilize said service. Utilization of SCOE service constitutes agreement to abide by terms of this Agreement for said service including terms of payment.
8. This Agreement supersedes any previous agreement for services enumerated in this Agreement.
9. Amendments. Amendments may be made to this Agreement only upon agreement by BOTH SUPERINTENDENT and DISTRICT or DEPARTMENT. In such cases, an Amendment to Master

Agreement Form shall be completed and signed by both parties **prior** to service being rendered.

10. **Mutual Indemnification.** Subject to the limitation delineated below, the parties agree to defend, indemnify and hold harmless the other parties, their governing boards, officers, and employees from every claim or demand and every liability, loss, damage, cost, expense, action, cause of action, or judgment of any nature whatsoever, arising from the willful misconduct or negligent act or negligent omission of the other parties in the performance of this agreement.
11. **Limitation of Liability.** District agrees that should there arise any liability on the part of SCOE as a result of SCOE's breach of contract, negligent performance to any degree or negligent failure to perform any of SCOE's obligations pursuant to this agreement or any other legal duty, equipment failure, human error, or strict products liability, whether economic or non-economic, in contract or in tort, that SCOE's liability shall be limited to the amount of money District has paid SCOE pursuant to the terms of this agreement.
12. **Insurance.** The SCOE and District have and agree to maintain, in full force and effect, a policy or policies of insurance evidencing all coverages and endorsements necessary, in each party's sole discretion, for purposes of effectuating the purposes of this Agreement. An appropriate self-insurance program shall be acceptable. Copies of the certificates of insurance for each party shall be provided upon written request of any party to this Agreement.
13. **Independent Contractors.** The SCOE and District, in the performance of services pursuant to this Agreement, shall be and act as an independent contractor. Each party understands and agrees that it and all of its employees shall not be considered officers, employees or agents of either of the parties to this Agreement. Each party assumes the full responsibility for the acts and/or omissions of its employees as they relate to the services to be provided under this Agreement. Each party shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to the party's employees.
14. **Assignment.** This Agreement and the services provided herein shall not be assigned by the District or SCOE.
15. **Applicable Laws.** SCOE and District agree to comply with all laws, rules and regulations applicable to these services.
16. **Governing Law.** This Agreement shall be governed by the laws of the State of California, with venue in Stanislaus County, California.
17. **Entire Agreement.** This Agreement constitutes the entire agreement between SCOE and the District. However, it does not supersede any prior, current or subsequent written agreement entered into by SCOE and the District with regard to any alternative, additional, or specialized agreement between DISTRICT and SCOE.

SCOE SERVICES AVAILABLE

Service	Rate
BUSINESS AND HUMAN RESOURCE SERVICES	
1. Human Resources/NCLB ESSA Para Educator Test (2 Sessions)	\$20.00
2. Human Resources/Substitute Teacher Clearinghouse Certificate of Employability	\$25.00
Subsequent Arrest/Conviction notification	\$25.00
3. Maintenance Services (hourly shop rates)	
Skilled Maintenance Worker per hour	\$97.23
Utility Worker & Grounds per hour	\$54.69
Additional Custodial	\$54.69
4. School Attorney (DISTRICT SERVICE ONLY)	
Annual Cost per P-2 ADA	\$12.08
Additional Services	See Schedule
5. Substitute Placement Service	
Annual Cost per teacher	\$120.00
Annual Cost per Instructional Aide (SCOE only)	\$120.00
Supplemental Assignments (EACH ASSIGNMENT)	\$25.00
DELIVERY AND GRAPHICS SERVICES	
6. Graphics	Price quoted by job
7. Mailing, Handling & Delivery	See page for rates

EARLY CHILDHOOD EDUCATION CHILD DEVELOPMENT SERVICES

8. Specialized Trainings to Support C

	Care and	Programs
Topics:		
• Regulations and Compliance Surrounding Need and Eligibility		\$ / participant for ½ day
• Projecting and Earning Center-based Contracts		\$ / participant for full
• Monitoring, Self-Assessment, and Program Evaluation		day plus materials/supplies
• General Program Administration		1 participants minimum

9. Specialized Trainings by Certified Trainers on Early Education / Child Development Tools

Topics:

- Environmental Rating Scale (ERS) \$50 / participant for ½ day
- Classroom Assessment Scoring System (CLASS) \$100 / participant for full
- CLASS Group Sp K b b S day plus materials/supplies
- Ages and Stages Questionnaire / Ages and Stages Questionnaire-Social/Emotional (ASQ/ASQ-SE) 15 Participants minimum
- Desired Results Developmental Profile (DRDP)
- Program for Infant/Toddler Care (PITC)
- Strengthening Families (SF)
- p m m E
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- S
- A A
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10. Specialized Trainings to Support STEAM in Early Education Classrooms

Topics:

- Using Books to Infuse Engineering in the Pre-K Classroom \$50 / participant for ½ day
- Loose Parts: Creating a Maker Space \$100 / participant for full
- Coding Skills for Preschoolers day plus materials/supplies
- Math in the Preschool Classroom: It's More Than 1+1=2 15 participants minimum
- Technology in the Preschool Classroom: Moving Beyond Tablets and Computers
- Introduction to STEAM Practices: Classroom Implementation and Parent Engagement Connection
- Innovative STEAM Coaching: From Data Collection to Improving Children's Outcomes
- Using Virtual Practice-Based Coaching to Elevate Educational Practices

11. Coaching for Early Education / Child Development Classrooms (listed per class)

Services (costs may be covered by CDE's Quality Counts California grant),
if not:

2 @ Pre-Assessments* \$9,750 per class

2 @ Post-Assessments*

9 @ On-site Coaching** Visit (Once per month)

*Assessments include: CLASS, ERS, Quality Improvement Plan (QIP)

**Coaching focus areas include: ERS, CLASS, ASQ, CA F&F, DRDP

Number of coaching visits varies by need (\$750/day)

12. Intensive Coaching for Early Education / Child Development Classrooms (listed per class)

Services (must be in addition to item #11):

9 Days of On-site Coaching** Visits (One day per month) \$13,500 per class

9 Individualized On-Site Trainings (One day per month)

**Coaching focus areas include: ERS, CLASS, ASQ, CA F&F

Specialized Assessments (Services may be covered by CDE's Quality Counts CA grant), if not:

CLASS - per 4 cycle assessment per classroom (minimum 2 classrooms) \$400

ERS - per assessment \$750

13. Preschool Classroom Operation

Services:

To fully staff and operate an on-campus preschool classroom following California Title V and Title XXII regulations including applicable service hours and staff-student ratios. Compliant classroom and outdoor playground area to be provided by LEA free of charge to SCOE including no charges for rent, utilities, custodial, and landscaping. Classroom to be filled and maintained with up to 24 students in each class session (AM and PM) for a total of 48 students per classroom. Each class session will operate for 3 hours per day. Class sessions to be provided for 180 days per year. Classrooms to be staffed with 3 instructional service staff and 1 family service staff

\$277,517 per
classroom of 48
preschool students

14. Community Needs Assessment

Services:

Consultation	\$600
Focus Groups (Plan & Implement Focus Groups)	\$2,757
Design & Development of full Community Needs Assessment (county focused)	\$10,966
Total Cost (county focused):	\$14,323

15. Public Report

Services:

Consultation	\$418
Design Public Report	\$522
Create full Public Report	\$2,089
Provide data templates and electronic copy of fully edited report	
Total Cost:	\$3,029

16. Early Childhood Data Management System

Services:

Two half day trainings plus help desk support for one year	\$1,744
Software use per child	\$15.89

SPECIAL EDUCATION & HEALTH SERVICES

17. Assistive Tech Services

Agency wide Assistive Tech Services - per district total P-2 ADA	\$15.00
Lending Library - Annual Subscription	\$5,000
Equipment Consultation ONLY, per consultation	\$250.00
Eye Gaze only set up fee, per set up	\$300.00

18. Board Certified Behavior Analyst

1 day per week (36 days of service/year)	\$31,815.00
½ day per week (18 days of service/year)	\$15,907.50
¼ day per week (9 days of service/year)	\$7,953.75

19. Hearing Screening

Hearing checks/child	\$4.85
Students in wheelchairs/child	\$9.70

20. School Nurse – Existing Clients Only

1 day per week (36 days of service/year)	\$28,350.00
½ day per week (18 days of service/year)	\$14,175.00
½ day every other week (9 days of service/year)	\$7,087.50

21. School Psychologist

1 day per week (36 days of service/year)	\$35,393.00
½ day per week (18 days of service/year)	\$17,696.50
¼ day per week (9 days of service/year)	\$8,848.25
Additional one time single day-subject to availability	\$ 985.00

22. Trainings

Behavior and Instructional Support

Contact Krissy Zapien @ 541-2215

Full day, 2 part, or 2-4 hour trainings
available

HEALTH SERVICES FOR SCOE DEPARTMENTS ONLY

23. Educational Audiologist (SCOE Only)

1 day per week (36 days of service/year)	\$24,500.00
½ day per week (18 days of service/year)	\$12,250.00
¼ day per week (9 days of service/year)	\$6,125.00

24. LVN (SCOE Only)

1 day per week (36 days of service/year)	\$18,375.00
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25. Registered Nurse (SCOE Only)

1 day per week (36 days of service/year)	\$21,000.00
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INSTRUCTIONAL SUPPORT SERVICES

- | | |
|---|------------|
| 26. Learning to Teach Continuum (Teacher Induction)
Tuition per Year per Teacher | \$3,000.00 |
| 27. Learning to Lead Continuum (Admin Induction)
Tuition per Year per Administrator if SCOE Provides the Coach | \$3,500.00 |
| 28. Media Services
California Streaming License per ADA | \$1.95 |

STUDENT EDUCATIONAL SERVICES

- | | |
|---|---|
| 29. Community School Education Services per ADA | District LCFF Rate calculated by grade span |
| 30. Outdoor Education | See Individual Contracts |

STUDENT WELLNESS AND SCHOOL SAFETY (Some trainings are available in a virtual format)

- 31. Mental Health and Suicide Prevention Trainings
 - Mental Health First Aid Training – 8 hrs (up to 30 people) (in person only)
 - Youth Mental Health First Aid - 6.5 hrs (up to 30 people) (in person only)
- 32. Suicide Prevention Training
 - Question, Persuade, Refer (QPR) - 1.5 hours (10-40 people recommended)
 - safeTALK - 3 hours (up to 30 people)
- 33. CPR/Pediatric First Aid Training - 6 hrs (up to 10 people)
- 34. Mindfulness Trainings
 - Growth Heartset: Culture of Caring - 4 hrs (up to 100 people)
- 35. Positive Behavior Intervention and Support (PBIS) & Behavioral Multi-Tiered Systems of Support (MTSS)
 - Standard Tier Training
 - Tier I "Universal" - four 6-hr training sessions, delivered throughout year one
 - Tier II "Targeted" - four 6-hr training sessions, delivered throughout year two
 - Tier III "Intensive" - four 6-hr training sessions, delivered throughout year three
 - Customized Targeted Coaching
 - PBIS/MTSS Hybrid Model (data-driven customized coaching) - 2.5 6 hr training sessions
 - PBIS/MTSS Implementation or Sustainability Customized Coaching
 - PBIS/MTSS Related Workshops (Half day to full day workshops)
 - PBIS for Classified Staff/District Leadership/New Team Members/Networking
 - Function of Behavior and Error Correction
 - Tier I Boosters
 - Tier II Boosters

STUDENT WELLNESS AND SCHOOL SAFETY CONTINUED

PBIS/MTSS Related Workshops (Continued)

- Prevent-Teach-Reinforce (PTR) Training
- Integrating Restorative Justice (RJ) into MTSS
- Integrating Trauma Informed Practices (TIPs) into MTSS
- School Wide Information System (SWIS) Training
- SWIS Team initiated Problem Solving (TIPs) Training

TECHNOLOGY AND LEARNING SERVICES

36. Information Systems:

QSS Accounting System and Laserfiche Business Management System	See Schedule
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37. Technology Services (DISTRICT SERVICE ONLY)

Internet access via Fiber - Tier 1 (below 200 ADA)*	See Schedule
Internet access via Fiber - Tier 2 (above 200 ADA)*	See Schedule
URL/Web Filtering per P-2 ADA	\$2.50
QCC/Laserfiche access only without Internet via fiber (actual cost)	\$3,000.00
QCC/Laserfiche access only without Internet via VPN (actual cost)	\$4,200.00
Technician Services (Non-Engineering Services) per hour	\$ 60.00
Engineering Services per hour	\$110.00

*Palo Alto Firewall is included with internet access as a bundled service at no additional cost.
Infrastructure technical support for core hardware for school districts; IP addresses for districts
and external DNS hosting. Price is delineated by Gbps purchased. See schedule

38. Canvas Learning Management (per account: teacher and student)	\$5.55
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39. Leading Edge Certification - Online and Blended (per participant)	\$350.00
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40. Leading Edge Certification Flex Program (per participant)	\$250.00
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41. Technology Services (SCOE Departments Only)	See page for rates
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42. Educational Technology - Customized Professional Development Trainings:

Google, O365, Adobe Suite, Ed Tech Workshops, Cybersecurity awareness, Robotics,
Digital Citizenship, Classroom Coaching, Digital Badging, Training on Chromebooks
and iPads for Education, Technology Integration and Pedagogy.

Half Day Training	\$975.00
Full Day Training	\$1,850.00

Contact Technology & Learning Resources Division for more information regarding services provided.
209-238-1400. <http://www.stancoe.org/division/technology-and-learning-resources/educational-technology-center-etc>

Assistive Technology Services

The SCOE and the DISTRICT are mutually interested in ensuring that education opportunities are provided for all students in Stanislaus County. DISTRICTS with students that may benefit from assistive technology may need additional services. DISTRICT shall pay any and all costs including up to total replacement cost for any damage or repairs that occur to equipment/device while in DISTRICT possession. Failure to return equipment/device at the agreed upon time shall result in full equipment/device replacement cost to DISTRICT. SCOE agrees to provide the following Assistive Technology Services on an as needed as requested basis to DISTRICT:

AT Services

- **Training with Follow-Up Coaching**
- **Request for Support**
- **Equipment Consultation**

-Training with Follow-Up Coaching

- Topics on-demand, varying formats (e.g. remote, pre-recorded, or in-person) and including those such as: AAC modeling, using AAC in different environments, discussing & documenting AT in the IEP, software/product-specific (e.g. PLQ, Clicker), overview of AAC/AT, AT in specific environments (SDC, GE), visual communication systems, administration walk-through guide, district/site-specific point person training, writing LI and MediCal requests for technology
- District and AT Team will come to a reasonable consensus regarding the topics and amount of trainings per year to best address student population needs
- Trainings of varying lengths (e.g. 1.5, 3, and 6 hours) after student hours as needed or on PD days
- Follow-up Coaching: as intense as needed (deemed by AT team per training), remote or in-person
- For the remainder of the school year, District has access to online/recorded tutorials and instructional guides & resources

-Request for Support (RFS) and AAC/AT Assessment (if warranted)

- RFS form filled out to start (and document) the conversation with AT department
- AT team (Education/AT Specialist and SLP) analyzes each request and collaborates through written response ("Response Summary form") with requesting member providing recommendations for the team to consider/implement, including:
 - Teacher/Staff supports, strategies and activities; Teacher/Staff trainings; Equipment for expressive communication, Criteria to use to determine effectiveness; and IEP Accommodations
- One-time follow-up with AT team and requesting member/team
- May lead to recommendation for SCOE AT assessment, Training, and/or Lending Library use
- In-person consultation provided only for most involved cases (eg. positioning, specialized equipment)

-Equipment Consultation (may be purchased a-la-carte)

- Technology research: AT team researches current available tech and gives options to site team
- Initial setup: new equipment and help with outside vendors (e.g.Tobii-Dynavox)
- Brief overview of student's equipment
- Help with basic problem solving as device issues arise
- **With eye gaze devices only:** additional required fee for setup, training, and extended AT program support

AT Lending Library

-One-year Subscription per District includes:

- Equipment loans for 90 days per device (60 days to assess/trial + 30 days for district to purchase if desired)
- Unlimited number of devices; 5 requests per person per day
- Each request is approved by a SCOE AT Specialist prior to loan (to ensure appropriateness)
 - Online training of Library procedures exists
- Equipment/device tutorials (videos online or written instructions)
- Brief overview of basic equipment function upon delivery

	Rate	Enter P-2 ADA or 1 if subscribing	Total
AT Service (incl training, follow-up coaching, RFS and Equipment consultation. Enter district total P-2 ADA			
Equipment Consultation ONLY , per consultation			
Set-Up fee - Eye Gaze only, per set up			
Lending Library 1-Yr Subscription, Enter 1 to subscribe			
Total Services:			

Account Number	Total
Total Account Numbers:	

AUDIOLOGICAL SERVICES

The purpose of the Hearing Conservation program is to provide State mandated hearing screening for regular and special education students. Such service is provided on a contractual basis to districts and counties upon request. Specially equipped hearing vans travel from school site to school site providing these screenings. For more information, please contact Tami Cervantes at 541-2361.

The SCOE agrees to provide audiological services to DISTRICT or DEPARTMENT as shown in the following paragraphs.

SCOE will pay all costs of audiological services staff, including salary, fringe benefits, and travel costs if any.

DISTRICT or DEPARTMENT will pay for actual students screened by SCOE. Below is an estimate which will be trued up at year end.

	# of	Rate/person	Total \$
Number of regular ed. students screened			
Number of non-SDC SH students			
Number of SDC SH students screened			
Number of Wheel Chair students			
TOTAL:			

Acct. #	Amount
TOTAL:	

AUDIOLOGIST - EDUCATIONAL SERVICES

SCOE DEPARTMENTS ONLY

The SCOE agrees to provide educational audiologist services to DEPARTMENT as shown in the following paragraph. For more information, please contact Tami Cervantes 541-2361.

SCOE will pay all costs of educational audiologist, including salary, fringe benefits, testing supplies and materials, typing of audiological reports and travel costs, if any.

DEPARTMENT will provide accommodations for the educational audiologist to conduct client interview and perform other confidential duties.

Days per week	Rate	Total \$

Acct. #	Amount
TOTAL:	

BOARD CERTIFIED BEHAVIOR ANALYST

The SCOE agrees to provide board certified behavior analyst services to support student behavior plans, consult with staff and provide training as requested to DISTRICT or DEPARTMENT as shown in the following paragraph. For more information, please contact Tricia Kelly at 541-2215.

General Behavior Support may include: Functional Behavior Assessments of students with significant behavior concerns to determine need for specialized supports in both general education and special education. Consultation with teachers and support staff on individualized behavior supports for students requiring behavior support beyond what is offered in the classroom management system in the general education setting. Trainings for staff to review Behavior Intervention Plans (BIP) and strategies, which includes modeling/overlap support of behavior plan implementation with teacher or 1:1 support staff, monitoring the implementation of the BIP, and support with writing behavior goals as well as creation of materials or data sheets to track progress as needed.

SCOE will pay all costs of board certified behavior analyst services, including salary, fringe benefits, testing supplies and materials, behavioral intervention plans as necessary and travel costs, if any.

DISTRICT or DEPARTMENT will provide adequate accommodations for the behavioral intervention care management services to conduct client interviews and perform other confidential duties.

Days per week	Rate	Total \$

Acct. #	Amount
TOTAL:	

COMMUNITY SCHOOL SERVICES

The SCOE and DISTRICT are mutually interested in ensuring that educational opportunities are provided for all students in Stanislaus County. In order to avoid any disruption of services related to the transfer of students to SCOE's Alternative, Community, and Correctional Education schools and Services, SCOE agrees to provide Community School services to DISTRICT under the provisions of the terms of this agreement:

1. DISTRICT students will have access to the SCOE community school programs upon referral from the DISTRICT.
2. DISTRICT agrees to provide a DISTRICT initiated "SCOE Referral Form" for each student the DISTRICT refers to the SCOE Community School program.
3. DISTRICT shall use the "SCOE Referral Form" when referring students to SCOE under sections 1981(a), (b), and (d) of the California Education Code even when not expressly required by said code.
4. SCOE is required to report ADA earned by E.C. 1981 (a), (b), (d) students under the district of residence of said student. In the case of homeless students, the district of residence is the last district to provide educational services to said student, if known. If not known, the school district with the largest average daily attendance in the county that serves the grade level in which the homeless child would be enrolled is the District of Residence.
5. SCOE, in accordance with the Local Control Funding Formula, shall calculate the LCFF Transfer Rate by grade span using the latest LCFF data elements and exhibits published by CDE. Elements include but are not limited to COLA, GAP %, DISTRICT Unduplicated Pupil Count, Supplemental and Concentration percentage figures. Initial rates will be calculated using the SCOE FCMAT Calculator Local Tab 1. Final rates will use official CDE posted calculations at each apportionment certification.
6. DISTRICT agrees to the automated fund transfer of this LCFF rate generated under paragraph 5 using the automated transfer mechanism as developed by CDE.
7. The SCOE shall provide the DISTRICT with attendance reports showing the average daily attendance (ADA) for all referred students at each attendance certification period and CalPads Unduplicated Figures at the CalPads Recertification period.

Acct. #

EARLY CHILDHOOD EDUCATION COURSE DESCRIPTIONS

ASQ/ASQ-SE	<p>Ages and Stages Questionnaires Training – This training provides information about the assessment, how it’s used, and how it provides developmental screening for children, ages birth to age six. Designed to pinpoint developmental progress and catch delays in young children.</p> <p>Ages and Stages Questionnaires- Social Emotional Training – This training provides staff with knowledge of the assessment and how to use the assessment to determine a child’s progress in the domain of social emotional development. Trainers may include information about how to talk to parents and resources available depending on the length of the training.</p>
CA-CSEFEL	<p>California Collaborative on the Social Emotional Foundations for Early Learning This training provides a comprehensive approach to promoting social-emotional competence and is designed to help educators address challenging behaviors in children and develop safe and nurturing environments for all children. This training is taught in a series of five full day trainings. This training requires that program administration also participate in the teaching pyramid leadership meetings (6/year).</p>
CSEFEL Coaching	<p>CSEFEL Coaching - 2 hour monthly visits including 1 hour observation and 1 hour coaching focused on the teaching pyramid modules.</p>
CLASS	<p>Classroom Assessment Scoring System Overview Training – This 1 hour training provides basic information about the CLASS tool and how it measures the quality of teacher/child interactions.</p> <p>Classroom Assessment Scoring System Reliability Training – This intensive training covers each dimension in the tool thoroughly explaining the difference between a dimension and a domain. The participant will be eligible to complete the certification test after the completion of this training. 1.5 days of training for the infant tool; 2 days of training for the toddler tool; 3 days of training for the Pre-K tool.</p>
CLASS Group Coaching	<p>Infant/Toddler or PreK Class Group Coaching (MMCI) - Making the Most of Classroom Interactions - Can be taught as 12 (2 hour) sessions or as 6 (4 hour) sessions. Provides thoughtful discussion after viewing teachstone videos one dimension at a time.</p>

EARLY CHILDHOOD EDUCATION COURSE DESCRIPTIONS CON'T

UDL	Universal Design for Learning - This 2 hour overview training explains UDL as learning an approach to design that originates from the belief that the broad range of human ability is ordinary, not special. Universal design accommodates people with disabilities, older people, children, and others who are atypical, and it accommodates them in a way that is not stigmatizing and benefits all users.
DRDP	Desired Results Developmental Profile (2015) Teacher Training (Full Day) – This training provides an overview of the DRDP format, the use of documentation and evidence to rate measures, and the importance of inter-rater reliability. Hands-on practice with sample portfolios is provided. Desired Results Developmental Profile (2015) Meaningful Observations Training (full day) – This training delves into the purpose of observation, observing and collecting evidence, organizing an observation system, and the importance of reviewing and reflecting on documentation before completing the rating.
ERS	Early Childhood Environment Rating Scale (ECERS) – This training can be personalized for your particular needs. It can be provided as an overview of the entire preschool tool, or can focus on two or three areas of the environment. Provides support to sites that need to complete their “Summary of Findings” for CDE. Infant/Toddler Environment Rating Scale (ITERS) - This training can be personalized for your particular needs. It can be provided as an overview of the entire infant/toddler tool, or can focus on two to three areas of the environment. Provides support to sites that need to complete their “Summary of Findings” for CDSS. Family Child Care Environment Rating Scale (FCCERS) - This training can be personalized for your particular needs. It can be provided as an overview of the entire family childcare home (FCCH) tool, or can focus on two to three areas of the environment. Provides support to sites that need to complete their "Summary of Findings" for CDSS.
PITC	Program for Infant Toddler Caregivers - Taught from the four PITC Modules, this training can be customized to provide support in specific areas of the classroom. The goal of PITC training is to help infant/toddler care teachers recognize the crucial importance of giving tender, loving care and assisting in the infants' intellectual development through an attentive reading of each child's cues.

SF

The Strengthening Families Framework – This training is a research-informed approach to increase family strengths, enhance child development and reduce the likelihood of child abuse and neglect. Focusing on the five universal family strengths identified in the Strengthening Families Protective Factors Framework, early childhood educators can better engage, support and partner with parents in order to achieve the best outcomes for children.

SPECIALIZED
TRAINING

Trauma Responsive and Resilience Building Practices: This training is designed to support early childhood educators and providers serving children ages 3 through 8 years old. The training is designed to support the early childhood workforce to be trauma informed and equipped with the concrete skills and knowledge to create nurturing, responsive and healing engaged programs for children who have been impacted by trauma and traumatic stress. This series will support ECE providers working in a range of settings and environments with young children and for individuals working in infrastructure organizations on behalf of young children and families. The training is 2 three hour sessions or 1 six hour session.

Supporting Inclusive Practices: This training provides a tiered technical assistance model and overview to support local education agencies (LEAs) in their intentional design and redesign of systems and supports to increase inclusion of and achievement for students with disabilities.

Adaptation & Accommodations: This training provides a specific set of practices to be used with any high-quality, developmentally appropriate early childhood curriculum. It is designed to increase engagement of children with disabilities and delays in the ongoing learning activities of the early childhood environments. It is a way of blending early childhood education and special education to enhance learning for all children.

Embedded Instruction: This training will review recommended instructional practices for preschoolers with or at risk of having learning challenges. In embedded instruction, teachers, families and other caregivers learn how to provide developmentally appropriate and intentional instruction to advance children's engagement and learning as part of their everyday activities routines and transitions.

Using Books to Infuse Engineering into the Pre-K Classroom – This training encourages teachers to use children’s books to create projects in their classrooms that allow for the basic engineering concept of Think, Build, Try, Revise, Share.

Loose Parts: Creating a Maker Space – The popular maker space idea is built on loose parts. In this training staff will be challenged to think about how they can incorporate an open ended area in their classrooms. Loose Parts ideas will be shared and teachers will be able to walk away ready to implement on Monday morning.

Coding Skills for Preschoolers – Coding is the way of the future! Staff will be ready to share with young children the basic concepts of patterns in coding and how pictures have meaning. This is all done in a play-based approach that is developmentally appropriate.

Math in the Preschool Classroom: It’s More than 1+1=2 – Not everyone loves math, but we can still share math skills with young children. Staff will learn fun ways to incorporate math terms like subitize and one-to-one correspondence into their lesson plans.

Technology in the Preschool Classroom Moving Beyond Tablets and Computers
- Staff will be inspired to use technology in appropriate and interesting ways in the classroom as they tinker with a variety of technology components. Preschool staff will learn how to use current technology to enhance their curriculum.

Your Inner Wacky Scientist – What science activities are appropriate for preschool children beyond sink and float? This training will provide activity ideas, enhance vocabulary, and prompt teaching staff to ask thought provoking questions to the young scientists in their classroom.

Acct. #

INFORMATION SYSTEMS

The SCOE agrees to provide school information systems to DISTRICT as shown in the following paragraphs. SCOE shall provide to DISTRICT those usual and customary electronic data processing support services necessary to support the services specified in the basic agreement. Services shall include the following:

1. Technical support:
 - a. QSS/Oasis System includes: Payroll, Retirement, Finance, Requisition Routing, Purchase Orders, Accounts Payable, Accounts Receivable, Human Resources, Position Control, Benefits Management, Absence Tracking, Fixed Assets, Stores, Invoicing & Billing Management (IBM) and Employee Self-Service (ESS Online)
 - b. Laserfiche Business Management System
2. Hosted virtual servers
3. Printing of payroll warrants
4. Printing of general expense warrants
5. Printing of W-2s/1099s
6. Use of computer programs available on July 1 of the fiscal year of this Agreement, or made available during the fiscal year of this agreement
7. Training to DISTRICT personnel by SCOE staff specific to the software systems in use under this section of the Agreement
8. Reserving prior agreed to amounts for future replacement
9. Access to digital files using Laserfiche business management system
10. Utilize the functionality of Laserfiche and workflow via client/web based access. This does not include scanning and/or indexing services. For scanning/indexing services, contact the SCOE Graphics Department

DISTRICT shall pay for all staff needed for data entry, retrieval, and the printing of reports/forms at the local level. DISTRICT shall also provide its own printer supplies, paper, and maintenance agreements on equipment owned by DISTRICT.

DISTRICT shall pay the cost of printing all special forms, including but not limited to, report cards, purchase orders and personnel records. SCOE shall pay for the cost and printing of payroll and general expense warrants and reports related to payroll and general expense warrant processing when electronic forms of the reports are not available. Payroll reports are automatically stored in Laserfiche.

DISTRICT shall update and maintain employee data in the SCOE Website Directory. Employee data includes: First Name, Last Name, Department, District, School, Division, Work Email, Work Phone Number and Route number.

Nothing in this Agreement shall prohibit two or more districts from joining together to share in the costs of peripheral equipment, data entry and retrieval or printing.

SCOE shall provide DISTRICT with the services specified in the basic agreement.

If DISTRICT should request support services in addition to those usual and customary services referred to in this Agreement, including custom programming, DISTRICT shall pay an additional amount for said additional service at actual cost to SCOE, plus an overhead charge of 9.8% of the cost of the requested additional services.

If DISTRICT requests SCOE to provide services which would normally be provided by DISTRICT, DISTRICT shall be required to pay an additional amount for said additional services at actual cost to SCOE, plus an overhead charge of 9.8% of the cost of the requested additional service. See attached schedule for schedule of rates.

Acct. #	Amount
Total	

INFORMATION SYSTEMS TRANSFER TO FUND OPERATING COSTS AND FUTURE REPLACEMENT FISCAL YEAR 2022-23

	2020-21	Pro-Rated	Replacement		2022-23
<u>District</u>	<u>Actual General Fund</u> <u>Operating Expenditures</u>	<u>District</u> <u>Share</u>	<u>Reserve</u> <u>Contribution</u>	<u>Operating</u> <u>Costs</u>	<u>Transfer</u>
Ceres	200,383,552.18	9.4917907%	\$13,288	\$199,587	\$212,875
Chatom	7,888,294.91	0.3736536%	\$523	\$7,857	\$8,380
Denair	17,291,332.90	0.8190578%	\$1,147	\$17,223	\$18,370
Empire	38,103,978.61	1.8049136%	\$2,527	\$37,953	\$40,480
Gratton	1,628,043.55	0.0771174%	\$108	\$1,622	\$1,730
Hart Ransom	9,119,828.24	0.4319891%	\$605	\$9,084	\$9,689
Hickman	9,826,966.61	0.4654849%	\$652	\$9,788	\$10,440
Hughson	26,716,788.18	1.2655238%	\$1,772	\$26,610	\$28,382
Keyes	11,377,113.33	0.5389124%	\$754	\$11,332	\$12,086
Knights Ferry	1,545,644.73	0.0732143%	\$102	\$1,540	\$1,642
Newman	44,117,739.18	2.0897741%	\$2,926	\$43,942	\$46,868
Oakdale	62,884,152.42	2.9787036%	\$4,170	\$62,634	\$66,804
Paradise	2,388,454.63	0.1131366%	\$158	\$2,379	\$2,537
Patterson	89,145,067.45	4.2226336%	\$5,912	\$88,790	\$94,702
Riverbank	37,359,939.49	1.7696698%	\$2,478	\$37,212	\$39,690
Roberts Ferry	2,018,027.67	0.0955902%	\$134	\$2,010	\$2,144
Salida	30,856,145.14	1.4615974%	\$2,046	\$30,734	\$32,780
Shiloh	2,413,439.69	0.1143201%	\$160	\$2,404	\$2,564
Stanislaus	46,034,638.65	2.1805740%	\$3,053	\$45,851	\$48,904
Sylvan	98,574,887.41	4.6693064%	\$6,537	\$98,183	\$104,720
Turlock	180,185,253.10	8.5350354%	\$11,949	\$179,469	\$191,418
Valley Home	1,991,494.36	0.0943333%	\$132	\$1,984	\$2,116
Waterford	28,155,395.57	1.3336680%	\$1,867	\$28,044	\$29,911
District Total	\$950,006,178.00	45.0000000%	\$63,000	\$946,232	\$1,009,232
Stanislaus COE	<u>n/a</u>	<u>55.0000000%</u>	<u>\$77,000</u>	<u>\$1,156,505</u>	<u>\$1,233,505</u>
Total	n/a	100.0000000%	\$140,000	\$2,102,737	\$2,242,737

Notes

Interest does not accrue to these accounts

Differences from above transfer amounts may differ due to rounding.

Projected Future Replacement Reserve is annual contribution

LEARNING TO LEAD CONTINUUM PROGRAMS

ADMINISTRATOR INDUCTION

Stanislaus County Office of Education, hereinafter called Program, is providing an Administrator Induction Program for its districts. Districts may utilize the Program by allowing their newly hired administrators to attend the Program and their administrative employees to serve as Lead Coaches. As such, the District has certain responsibilities with regard to the effective implementation of the Program and the Program's ability to recommend Candidates for a Clear Administrative Services Credential.

District Agrees to:

1. Designate a District Coordinator (DC) to serve as a liaison between the District and the Program and to serve as the district signatory in decision-making.
2. Identify and communicate with eligible administrative Candidates at the point of hire that an approved Administrator Induction Program is available to them and that the Candidates may complete the two-year Program to be recommended for the Clear Administrative Services Credential through SCOE.
3. Provide Program information and deadlines so that Candidates may apply for admission to the Program during the first months of their first academic year serving in an administrative position as per state guidelines.
4. Provide the Candidates access to Program events and support, including collaboration time with the Candidate's Lead Coach, for completion of the Program requirements within two years.
5. Provide the Candidates access to leadership opportunities in their administrative duties that are consistent with minimum requirements set forth by state guidelines for Clear Administrative Service Credential applicants.
6. Utilize a Lead Coach from the Program's pool of Lead Coaches.
7. The district understands and agrees that the Program assesses the quality of services provided by Lead Coaches using multiple sources including information from Candidates.
 - a. The Program provides formative feedback to Lead Coaches on their work and will retain only those that are successful
 - b. If a mismatch occurs between the Lead Coach and the Candidate, protocols within the Program will be followed that may lead to removal of the Lead Coach and assignment of a new Lead Coach to the Candidate
 - c. Removal of a Lead Coach either from the program's pool of Lead Coaches or from support of a particular candidate may be an option and will be done at the Programs discretion

8. The district will be given an opportunity to evaluate, to give input, or request a change of Lead Coach assigned to the Candidate.

9. The district will **choose one option** below regarding the establishment of tuition protocols for SCOE's Induction Programs

Our district will be paying the SCOE Administrator Induction tuition for all participating candidates (\$3,500 per year or \$7,000 for the two year program).

Our district will be paying the SCOE Administrator Induction tuition for all participating candidates, and will be seeking full or partial reimbursement from the participating candidates.

Our district candidates are responsible for 100% of the SCOE Administrator Induction program tuition.

Our district will be paying _____ % of the SCOE Administrator Induction tuition.

Our district will be paying \$_____ of the SCOE Administrator Induction tuition.

Acct. #	Cost Per Candidate	Est # Candidates	Amount
TOTAL:			

LEARNING TO TEACH CONTINUUM PROGRAMS TEACHER INDUCTION

Districts utilizing the Stanislaus COE Learning to Teach Continuum Programs (GenEd Induction and SpEd Induction) are co-sponsors of the programs and, as such, have certain responsibilities in regards to the effective implementation of these programs and their ability to recommend candidates for the appropriate professional clear credential. Submission of the master agreement indicates that the district has agreed to the conditions below and will act as co-sponsors until such time as either the district or the programs terminate the agreement in writing.

District responsibilities include:

1. Designating a primary contact person from the district to the program to serve as a District Coordinator (DC) and designating a Lead Mentor according to specified program criteria. One person may hold both titles or a consortium of small districts may designate one District Coordinator and Lead Mentor to serve several small districts.
2. Pairing candidates with qualified mentors according to program-specified ratios (no more than three for a full-time teacher mentor, no more than twenty-three for a full-time released mentor with commensurate ratios for part-time teacher mentors) taking into consideration like credential, grade or content expertise, geographic proximity, and school schedules. **The pairing will be completed within 30 days of the start of the teaching contract.** Please see document titled *Mentor Responsibilities* for detailed mentor qualifications.
3. Identifying eligible candidates to the program leadership prior to their participation in induction.
4. Providing representation at ***all*** Advisory Council meetings to receive pertinent program information.
5. Communicating with eligible candidates at point of hire that they must enroll in an approved induction program within 30 days of the start of the teaching contract and that they must complete a two-year induction program to be recommended for a professional clear credential.
6. Informing candidate(s) of any financial responsibility at point of hire.
7. Informing eligible candidates in writing of the completion requirements of the SCOE Induction Program.
8. Providing eligible candidates with information regarding dates of induction events.
9. Selecting and providing stipends to suitable mentors from within or without of district for candidates according to specified criteria. Contact program staff for names of suitable out of district mentors if needed.

10. Ensuring candidates teach in a context using state adopted academic standards.
11. Sending site administrators (who have candidates on site) to attend one half day Induction Institute event.
12. Support candidates and mentors in scheduling and holding a TRIAD CONVERSATION with site administration BEFORE attending an Orientation.
13. Ensuring candidate attendance at an Orientation in order to develop the ILP **within 60 days** of the start of school. If a candidate is a late hire and cannot attend the last Orientation date, the district must provide “just in time” support for that teacher until enrollment in induction the following school year.
14. Providing substitute release time for:
 - Candidates to attend required events and ensure that they have the opportunity to complete the induction program’s requirements for the recommendation for a professional clear credential.
 - Mentors to attend required events, complete observations and complete the plan, teach, reflect, apply cycle with candidates.
 - Both mentors and candidates to observe colleagues and peers.
15. Ensuring that every candidate in his or her first year, on site or in the district, is provided with an orientation for new teachers that includes policies, procedures, and site resources. Candidates must be provided information regarding:
 - Accident prevention strategies on site
 - School’s crisis response plan (including procedures for responding to emergency health situations, procedures for contacting staff identified as first aid and CPR certified, and any conflict resolution strategies or techniques for defusing potentially violent situations)
 - School policies regarding accessing health and mental health resources
 - Adopted health curriculum
 - State and local policy regarding permitted health topics, family life and sex education, and procedures for notifying parents, and parents’ rights regarding instruction in health
 - State and federal reporting requirements relating to child abuse and neglect
 - Guidelines for accessing and using outside speakers
 - Adopted instructional program for the teaching and support of English language learners
 - Referring students for special education services
 - District retention and promotion policies
16. Providing candidates with student data from various sources to be used for the plan, teach, reflect, apply cycle.

17. Recognizing that work done in induction, including the ILP and CGE, is for professional growth and development of the candidate and not for evaluation for employment purposes.
18. Providing support to mentors so that they may provide both “just in time” support and longer term analysis of teaching practice to help candidates develop enduring professional skills.
19. Ensuring dedicated time for regular mentor and candidate interactions; no less than one (1) hour per week on average of individualized support/mentoring as required by program standards.
20. Assessing or responding to information about the success of the pairing and having a plan for reassignment, if necessary. Candidates will have input regarding the pairing and the district will retain only those mentors who are successful. Districts will need to reassign candidates to a new mentor if requested by the program.
21. Ensuring district representation for accreditation interviews (every seven years), and responding to surveys and questionnaires for the purpose of determining program effectiveness.
22. Ensuring district representation at the Read event:
 - Districts are responsible for providing one reader for every four candidates enrolled in the program.
 - Districts that have less than four candidates in the program must provide at least one reader.

The DISTRICT will choose one option below regarding the establishment of tuition protocols for SCOE's Induction Programs. Full annual tuition will be journaled in January of each year.

- a. Our district will be paying the SCOE Induction tuition for all candidates.
- b. Our district will be paying the SCOE Induction tuition for all candidates, and will be seeking full or partial reimbursement from the candidates.

Financial responsibilities for candidates who drop or withdraw will be handled on a case by case basis.

Acct. #	Cost Per Candidate	Est # Candidates	Amount
TOTAL:			

LEGAL SERVICES

The SCOE agrees to supply legal services to DISTRICT as shown in the following paragraphs.

SCOE shall provide legal services to DISTRICT through the placement of an attorney from the education law firm of Atkinson, Andelson, Loya, Ruud & Romo ("Law Firm") at SCOE for not less than one day per week. Attorney office hours will normally be all day Tuesday, although DISTRICT can contact attorney on any day for services at no additional charge. Normally, the attorney staffing the office shall be Chesley ("Chet") Quaide.

DISTRICT agrees that legal services provided pursuant to this Agreement are basic services. The fee for said basic services is \$12.08 per Agreement Year Actual P-2 ADA, which include the following:

1. Reviewing and advising regarding contracts and drafting simple contracts where appropriate.
2. Providing up to a total of six (6) workshops per year to the Stanislaus County Office of Education (which DISTRICT may attend) on requested topics.
3. Advice on student and personnel matters to the point of significant work being required focusing on an individual (significant work is drafting language, investigation, preparing pleadings, etc.).
4. Telephone advice, other than on the subject of specific labor negotiations. This service includes calls for member districts to attorneys at the attorney's office on days when the attorney is not on site.
5. Preparation of written opinions by the attorney who staffs the Office as identified above. In response to a request for an opinion (other than on questions which are basically labor negotiation issues).
6. SCOE overhead costs for housing attorney.

The basic level of services shall not include:

1. Conduct labor negotiations.
2. Representation in hearings, whether court, unfair practice charges, arbitration, layoffs, employee or student discipline, or other forms of representation.
3. Highly specialized areas of law, which include but are not limited to bankruptcy, intellectual property, financing and tax and bond counsel work.
4. Legal matters other than those included in basic legal services above.

5. Special education or facilities and land use legal services other than telephone advice from the attorney staffing the office. Appearances at school board meetings.
6. Services, other than telephone advice, where the attorney providing the service is a specialist other than the attorney who normally staffs the office at SCOE as identified above.

In addition to the above referenced basic services, additional legal services will be billed to DISTRICT at the rate of \$320 per hour for senior partners, \$300 per hour for partners or senior associates, \$275 per hour for associates or paralegals providing investigatory services, and \$170 per hour for other services provided by paralegals or legal assistants, plus expenses. Office overhead fees do not apply to these costs.

Fee Arrangements for Specialized Legal Services:

For specialized litigation and transactional services in the areas of construction, procurement, technology, prevailing wage, real property, CEQA, mitigation negotiations, school and college finance, tax, bankruptcy, copyright, nonprofit organizations, immigration and appellate law, the DISTRICT agrees to pay Law Firm at rates higher than the standard hourly rates for special projects or particular scopes of work. The Law Firm shall inform the DISTRICT of the rates for specialized services and the Superintendent or designee shall agree to such rates in writing prior to any billings by the Law Firm.

Fixed Fee Services:

The services listed in Exhibit A shall be performed by Attorney for the fixed fees described therein during 2022-2023.

Costs and Expenses:

In addition to the fees described above, DISTRICT agrees to pay five percent (5%) "administrative fee" calculated and based on the total monthly billed fees to cover certain operating expenses of the Law Firm incurred in providing services to the Consortium. This administrative fee is in lieu of the Law Firm charging DISTRICT for telephone charges (\$.07 per minute), incoming and outgoing faxes (\$2.00 per page), photocopies (\$.20 per page), mailing fees, messenger services, computer database (e.g., Westlaw) searches (billed at vendor's standard retail rate), word processing (\$40.00 per hour), and travel expenses including mileage at IRS rate, parking, meals, and lodging (excluding airfare).

Costs relating to fees charged by third parties retained to perform services ancillary to the Law Firm's representation of DISTRICT are not included in the administrative fee and are charged separately.

These include, but are not limited to; deposition and court reported fees, transcripts costs, witness fees (including expert witnesses), process server fees, and other similar third party fees. The Law Firm shall not be obligated to advance costs on behalf of DISTRICT; however, for purposes of convenience and in order to expedite matters, the Law Firm reserves the right to advance costs on behalf of DISTRICT with the prior approval of the

Superintendent or designee in the event a particular cost item exceeds \$2,000 in amount, and without the prior approval of the Superintendent or designee in the event a particular cost item totals \$2,000 or less.

If the Law Firm retains, with authorization from DISTRICT, experts or outside consultants for the benefit of DISTRICT, rather than DISTRICT contracting directly with any expert or outside consultant, the DISTRICT agrees to pay a five percent (5%) "consultant processing fee" in addition to the actual costs paid by the Law Firm to the expert or outside consultant in order to offset certain costs to the Law Firm resulting from administering and initially paying such expert and outside consultant fees on behalf of DISTRICT. This fee shall not apply to the services of Law Firm provided non legal consultants as set below.

Billing Practices:

A detailed description of the work performed and the costs and expenses advanced by the Law Firm will be prepared on a monthly basis as of the last day of the month and will be mailed to DISTRICT on or about the 15th of the following month, unless other arrangements are made. Payment of the full amount due, as reflected on the monthly statement, will be due to the Law Firm from DISTRICT by the 10th of the month following delivery of the statement, unless other arrangements are made. In the event that there are funds of DISTRICT in the Law Firm's Trust Account at the time a monthly billing statement is prepared, funds will be transferred from the Law Firm's Trust Account to the Law Firm's

General Account to the extent of the balance due on the monthly statement and a credit will be reflected on the monthly statement. Any balance of fees or costs advanced remaining unpaid for a period of 30 days will be subject to a 1% per month service charge.

The Law Firm shall bill in one-quarter hour increments.

Certain tasks shall be billed at established minimum time increments. These include: (a) telephone conference (.25 hour), (b) electronic correspondence (.25 hour), (c) standard written correspondence (.50 hour), (d) provide a document (.50 hour).

The Law Firm may charge the full hourly rate to more than one client for services provided during the same time period. Examples include, but are not limited to: (a) providing telephone advice to a client while traveling in connection with representing another client, (b) providing written email advice to a DISTRICT while representing another client in labor negotiations.

DISTRICT agrees to review the Law Firm's monthly statements promptly upon receipt and to notify the Law Firm, in writing, with respect to any disagreement with the monthly statement. Failure to communicate written disagreement with the Law Firm's monthly statement within thirty (30) days of DISTRICT's receipt thereof shall be deemed to signify DISTRICT's agreement that the monthly billing statement accurately reflects the services performed; and the proper charge for those services.

Termination of Representation on a Particular Matter:

The Law Firm reserves the right to discontinue the performance of legal services on behalf of DISTRICT on a particular matter upon the occurrence of any one or more of the following events:

Upon order of a court of law requiring the Law Firm to discontinue the performance of legal services;

Upon a determination by the Law Firm in the exercise of its reasonable and sole discretion, that state or federal legal ethical principles require it to discontinue the performance of legal services;

Upon a determination by the Law Firm in the exercise of its reasonable and sole discretion, that state or federal legal ethical principles require it to discontinue the performance of legal services;

Upon a failure of DISTRICT to perform any of DISTRICT's obligations with respect to the payment of the Law Firm's fees, costs or expenses as reflected on the monthly bill;

Upon a failure of DISTRICT to perform any of DISTRICT's obligations with respect to the duty of cooperation with the Law Firm in connection with the Law Firm's representation of DISTRICT.

In the event that the Law Firm ceases to perform services for DISTRICT on a matter, DISTRICT agrees that it will promptly pay to the Law Firm any and all unpaid fees and costs advance, and retrieve all of its files, signing a receipt therefor. Further, DISTRICT agrees that, with respect to any litigation where the Law Firm has made an appearance in a court of law on its behalf, DISTRICT will promptly execute an appropriate Substitution of Attorney form. Any termination of Law Firm's representation on such a matter may be subject to approval by the applicable court of law.

Consent to Joint Representation:

DISTRICT acknowledges that from time to time Law Firm may be asked to perform legal services on a matter affecting two or more DISTRICTS. In such situations before proceeding with representation, Law Firm shall seek separate written consent to joint representation from all involved parties if permissible according to ethical principles applicable to attorneys. DISTRICT acknowledges that it is often in the best interest of DISTRICT for such representation to commence without undue delay which may result from waiting until a regularly scheduled Board meeting. Therefore, pursuant to Education Code section 7, the Governing Board of DISTRICT hereby delegates to the Superintendent or designee authority to consent to joint representation in the circumstances described in this paragraph.

Client Cooperation:

The Consortium agrees to fully cooperate with the Law Firm in connection with the Law Firm's representation of DISTRICT, including but not limited to, attending mandatory court hearings and other appearances, making its employees and officials available, and providing accurate information documentation necessary to enable the Law Firm to

adequately represent DISTRICT.

Services Performed by Law Firm Provided Non-legal Consultants:

The Law Firm has an affiliation with non-legal consultants who are available to provide services in areas including, but not limited to, personnel/business office audits, human resources/collective bargaining consultation, public/employee relations surveys and communications, media and public relations, budget analysis/support services, instructional coaching/counseling at school improvement sites, leadership coaching, board/superintendent relations and best practices, and interim management placement.

Because the Law Firm has a financial interest in DISTRICT's use of these affiliated non-legal consultants, the rules of the State Bar of California require that the client provide its informed written consent to this arrangement prior to utilizing these services. Execution of this Agreement shall be deemed "informed consent" for the purpose of this paragraph. DISTRICT is hereby advised that it may seek the advice of an independent attorney of your choice prior to providing such written consent.

Please also be advised that because these non-legal consultants are provided to DISTRICTS outside of the attorney-client relationship, communications with these non-legal consultants will not be protected from disclosure by the attorney-client privilege.

Binding Arbitration:

DISTRICT agrees that all disputes which arise between DISTRICT and law firm, whether financial or otherwise regarding the attorney-client relationship, shall be resolved by binding arbitration. The parties agree to waive their right to a jury trial and to an appeal.

Miscellaneous:

The Law Firm maintains errors and omissions insurance coverage applicable to the services to be rendered.

	# ADA	Rate/ADA	Acct. #	Total \$
Estimated P-2 ADA of				
Estimated P-2 Charter Schools ADA				
TOTAL:				

LEGAL SERVICES EXHIBIT A

FIXED FEE SERVICES

1.	1 full day of training (up to 8 hours)	\$5,000.00
2.	½ day of training (up to 4 hours)	\$3,500.00
3.	2 hour training	\$2,500.00
4.	1 hour training	\$1,500.00
5.	Architect's Agreement	\$500.00
6.	Front-end Bid Documents for School Construction Project	\$1,000.00
7.	Disability Accommodation Forms and Policies	\$500.00
8.	Student Expulsion Forms Packet	\$1,000.00

MAIL HANDLING & DELIVERY SERVICES

The SCOE agrees to supply mail handling and delivery services to DISTRICT/DEPARTMENT per the schedules below.

DELIVERY DAYS	
One delivery per week per site	\$470
Additional delivery day to same address per week add per day	\$210
Example: School site receives one delivery per week	\$470
Example: District/SCOE receives three deliveries per week	\$470+\$210+\$210=\$890
Mail for several sites delivered to one location	\$470+\$210+\$210=\$890 <i>Plus</i> choice of sort option below
UNSORTED: Each additional site included in the delivery (Unsorted means that mail will not be presorted and bundled by site)	\$210 per site

For questions and clarifications, please contact us at 238-6930.

Option 1: **Delivery to D.O. and School Sites**

	Days/ Sites	Rate	Total \$
To D.O. one delivery day per week			
Additional day(s) to D.O.			
Number of school sites			
TOTAL:			

Option 2: **All district mail delivered to one site**

	Days/ Sites	Rate	Total \$
To D.O. one delivery day per week			
Additional day(s) to D.O.			
Number of school sites			
TOTAL:			

Acct. #	Amount
TOTAL:	

Multimedia Services Membership (California Streaming, CalSNAP and other related Services) Instructional Support Services

The Stanislaus County Office of Education, hereinafter referred to as SCOE, agrees to:

- Supply multimedia services membership and online media.
- Maintain a collection of instructional media resources, correlated to the state standards, contents of which shall be available online.
- Provide consultant assistance/workshops on a fee for service basis through Instructional Support Services. Sample topics may include but are not limited to: how to use California Streaming and/or CalSNAP, techniques for using video effectively in the classroom and use of standards alignments in selecting titles.
- Purchase license rights to allow the use of online instructional video-streaming programming which support the California Common Core State Standards.
- Provide multimedia services membership to those programs that generate district and charter school average daily attendance (ADA).

The District agrees to:

- Provide a designated contact to act as a liaison and assist with account management.
- Adhere to/enforce the terms of use agreements on the CalSNAP/California Streaming websites.
- Adhere to/enforce duplication, access and copyright compliance:
 - Under no circumstances is the instructional media to be copied by any process known or unknown at this time.
 - Members shall not charge an admission fee for viewing any of the instructional media provided.
 - All licensed media have specific terms and conditions for download, duplication, and retention.
 - To maintain copyright compliance when membership is not renewed, a "Certification of Erasure" of all media duplicated or downloaded during a membership period will need to be signed by an authorized contact.

Multimedia Services Membership:

CalSNAP Online Search with CaliforniaStreaming.org and open resources: unlimited use of California Streaming titles to all schools. Student/home accounts available upon request.

\$1.95 per student for individual schools or partial district enrollment

	# ADA	Rate	Acct. #	Total \$
Estimated Total ADA:				
TOTAL:				

SCHOOL NURSE SERVICES

The SCOE agrees to provide School Nurse services to DISTRICT or DEPARTMENT as shown in the following paragraphs. For more information, please contact Tami Cervantes at 541-2361.

SCOE will pay all costs of School Nurse, including salary, fringe, benefits, and travel costs, if any.

DISTRICT or DEPARTMENT will pay costs of (1) first aid materials and supplies and (2) other supplies and materials used by the nurse in fulfillment of responsibilities for DISTRICT or DEPARTMENT.

Days per week	Rate	Total \$

Acct. #	Amount
TOTAL:	

At this time, this service is for districts with existing contracts only. All others interested, please contact Tami Cervantes for more information.

THIS PAGE FOR SCOE DEPARTMENTS ONLY NURSING SERVICES

SCOE agrees to provide Registered Nurse services or LVN services to DEPARTMENT as shown in the following paragraphs. For more information, please contact Tami Cervantes at 541-2361.

SCOE will pay all costs of nurse, including salary, fringe benefits, and travel costs, if any.

DEPARTMENT will pay costs of (1) first aid materials and supplies and (2) other supplies and materials used by the nurse in fulfillment of responsibilities for DEPARTMENT.

REGISTERED NURSE SERVICES – SCOE ONLY

Days per week	Rate	Total \$

Acct. #	Amount
TOTAL:	

LVN SERVICES – SCOE ONLY

Days per week	Rate	Total \$

Acct. #	Amount
TOTAL:	

SCHOOL PSYCHOLOGIST SERVICES

SCOE agrees to provide school psychologist services to DISTRICT or DEPARTMENT as shown in the following paragraph. For more information, please contact Sarah Grantano at 541-2216.

SCOE will pay all costs of school psychologist, including salary, fringe benefits, testing supplies and materials, typing of psychological reports and travel costs, if any.

DISTRICT or DEPARTMENT will provide adequate accommodations for the School Psychologist to conduct client interviews and perform other confidential duties.

	Days	Rate	Total \$
Annual Service: Specify Days per week			
Add'l Single Use Days			

Acct. #	Amount
TOTAL:	

STUDENT WELLNESS AND SCHOOL SAFETY

The SCOE will provide trainings to support student wellness and school safety efforts according to the paragraphs below.

SCOE can provide all necessary equipment, upon advance request, if room does not have a system that meets the needs of the training.

SCOE will pay for all costs of trainers, including salary, fringe benefits, and travel costs, if any.

SCOE will journal cost of training and materials upon completion of training.

DISTRICT will provide training location. Trainings can be held in school, community or workplace settings. SCOE can assist in holding location if space is available.

DISTRICT is responsible for participant recruitment and registration, facility reservation and room setup. Upon advance request, SCOE can assist in these areas.

Available Training: Below is a list of trainings and services that are available. See the official course descriptions for more comprehensive training descriptions. List subject to change and expansion.

MENTAL HEALTH AND SUICIDE PREVENTION COURSES:

Mental Health First Aid Training: Mental Health First Aid is a public education program that introduces participants to risk factors and warning signs of mental illnesses, builds understanding of their impact, and overviews common supports. This 8 hour course uses role-playing and simulations to demonstrate how to offer initial help in a mental health crises situation. There are two versions of this course: one designed for the general population and the other for adults who work with youth.

QPR Gatekeeper Training: QPR stands for Question, Persuade and Refer-three simple steps that anyone can learn to help save a life from suicide. Learn how to recognize the warning signs of a suicide crisis and then question, persuade and refer someone to help.

SCHOOL CLIMATE, SAFETY AND CRISIS RESPONSE COURSES:

Bullying Prevention and Intervention Strategies Workshop: This workshop will provide a thorough overview of bullying including working definitions and legal mandates, prevention and intervention strategies, and a variety of resources to help address the issue in schools.

School Crisis Response Training: This training will raise awareness and build participants’ skills for developing effective crisis response or disaster preparedness plans that meet Federal and State requirements.

School Safety Planning Workshop: This workshop will help prepare participants to develop and maintain a comprehensive school safety plan.

Positive Behavior Intervention and Support (PBIS) Implementation Training: School wide leadership teams will be trained to implement PBIS according to the national implementation blueprint. School teams will participate in four days of training each year for three consecutive years for a full implementation of a multi-tiered system of supports through PBIS.

Acct. #

SUBSTITUTE PLACEMENT SERVICE

The SCOE agrees to provide substitute placement services to DISTRICT or DEPARTMENT. DISTRICT or DEPARTMENT agrees to pay for the service based on the total number of faculty members employed by the DISTRICT or DEPARTMENT during the school year. Such number of faculty members shall be based on the CalPads 4.2 Staff County Unduplicated Total (less Administrators) or that maximum number employed by DISTRICT or DEPARTMENT during the school year under contract, whichever is greater.

The SCOE agrees to perform the following services:

1. Receive and record requests for substitute teachers and from contracted district schools and teachers.
2. Contact and assign appropriately qualified and available substitute teachers. The Substitute Placement Service will only confirm the initial date of needed service. Continuing assignments must be affirmed by district or school officials in accordance with local policies and procedures.
3. Report to assigned substitutes the information provided by the district staff.
4. Districts may access the Absence Management system to obtain information regarding their districts's absences, daily reports or supplementary assignments.
5. Verify and monitor credential, DOJ clearance and tuberculosis clearance requirements of qualified substitute teachers.
6. Maintain a current schedule of rates of pay for substitute teachers in subscriber districts.
7. Receive and record requests for supplementary assignments from SCOE and contracted campus users.

The DISTRICT or DEPARTMENT agrees to the following conditions:

1. Employ substitute teachers referred to the DISTRICT or the DEPARTMENT by the SCOE based on requests from DISTRICT or DEPARTMENT staff.
2. The DISTRICT or SCOE DEPARTMENT may record an absence on the Absence Management system at any time.

3. Instruct DISTRICT or DEPARTMENT teachers as to the procedures for requesting the services of the Substitute Placement Service.
 - a. Teachers and DISTRICT/DEPARTMENT/School Site Personnel call Absence Management at: **800-942-3767** to report an absence.
 - b. Staff and campus users having difficulties with the system may call the Substitute Service HELP line at **238-4265**.
 - c. **SCOE ONLY** para educator employees and substitute para educators may call the Substitute Service HELP line at **238-4266**.
 - d. **SCOE ONLY** other classified staff requiring a substitute may call the Substitute Service HELP line at **238-4275**.
 - e. **WHEN CALLING THE HELP LINE** Please give the following information:
 - i. State the date of the absence.
 - ii. First and Last name (Please use the name used by the district payroll office) and spelling of each.
 - iii. Name of district and name of school (site).
 - iv. Teaching assignment:
 1. Elementary: indicate grade level.
 2. Secondary: indicate grade(s) and subject(s) taught.
 - v. Reporting and ending time.
 - vi. Indicate name of preferred substitute teacher, if any:
 1. No change of preference will be accepted.
 2. Preference cannot be guaranteed.
 - vii. State reason for absence.
4. Contact the assigned substitute **before 3:00 p.m.** to indicate whether or not he/she should return on the following day and enter the assignment into the system.
5. Maintain records of attendance and reasons for absence of district teachers.
6. Maintain records of attendance and assessment of assigned substitutes.
7. Enforce local policies with regard to teachers' obligations to properly report absences.
8. Determine contact personnel at each site to receive, orient and assign substitute teachers.

9. Teachers and campus users are encouraged to call the Substitute Placement Service as early as possible if assistance is needed regarding details of assignments.
10. Supply the SCOE Substitute Service with the following information **at least ten (10) working days prior to the start of the school year**:
 - a. Updated site contact information.
 - b. School site calendar for current year.
 - c. List of teachers with current assignment information including reporting times.
 - d. Updated site exclusion lists.
11. DISTRICTS/DEPARTMENTS electing to discontinue Substitute Placement Services must notify the SCOE in writing by February 1st of each year.

	# Of Staff	Rate	Total \$
ALL: # of Teachers			
SCOE Est # of Assistants			
TOTAL:			

Acct. #	Amount
TOTAL:	

TECHNOLOGY LEARNING RESOURCES ETC SERVICES

Customized Professional Development

- Contact Technology & Learning Resources for pricing

Professional Topic Areas, such as:

- Google Workplace (Formerly G Suite/Google Apps for Education)
- Microsoft Office 365
- Adobe Creative Cloud Suite (Photoshop, Audition, Spark, etc ...)
- Robotics and Coding
- Digital Literacy and Citizenship
- Classroom Coaching
- Digital Badging
- Training on Chromebooks and iPads for Education
- Technology Integration and Pedagogy

Customize Coaching and Support for:

- Instructional/Educational Technology leadership
- Classroom Educators
- Administrators
- Support Teams/Classified/Office staff

Large Event Logistical Planning and Support

- Work with the Educational Technology Center staff to plan a district/school-wide professional development event

Canvas

Annual Cost \$5.55/ account (teacher and student)

Canvas is a Learning Management System tool that provides users with the tools to create distance learning lessons and collect and grade students' assignments. Canvas Studio, a screen recording tool and video storage system, is included at this price.

Leading Edge Certification for Online and Blended Teachers (LEC)

\$350/ participant

Leading Edge Online and Blended Teacher Certification guides educators through a curriculum based on The National Standards for Quality Online Teaching and The iNACOL Blended Teacher Competency Framework. Participants will develop the skills to effectively facilitate online and blended courses, as well as a solid understanding of how to enhance the learning opportunities for all students enrolled in their courses. Completion of the program will result in a portfolio of online and blended learning projects across all curricular areas.

Leading Edge Certification Flex Program

\$250/ participant

10+ participants per district please contact Allegra Morelli at amorelli@stancoe.org or 209-238-1425 for pricing

Similar to the original LEC course, the Leading Edge Certification Flex Program guides educators through a curriculum in a self-paced approach that allows participants to choose their area of focus, including Professional Learning Leader, Digital Educator, and Online and Blended Teacher, among others. Completion of the program will result in a portfolio of selected curricular area.

Program	Cost/participant	# of Participants	Total Cost
Canvas			
LEC Online and Blended			
LEC Flex			
LEC Flex custom pricing			
Total Cost			

Account #	Amount
Total:	

TECHNOLOGY SERVICES

The SCOE agrees to supply WAN access to DISTRICT as shown in the following paragraphs.

The SCOE will provide access to the Internet, based upon the choice by the district in the Master Agreement.

DISTRICT agrees to conform to the Technology Services practices and procedures and further agrees to:

1. Conduct, or cause to be conducted, in-service workshops for teachers on the acceptable use and care of Internet resources. (Consultant assistance for in-service workshops is available from the SCOE through the Technology & Learning Resource division 238-1400).
2. Provide Internet connectivity from DISTRICT TO SCOE.

Type of Service	Amount	Rate	Total \$
Internet access via Fiber - Tier 1* (below 200 ADA)			
Up to 1 Gbps			
1 Gbps - 5 Gbps			
5 Gbps - 10 Gbps			
Internet access via Fiber - Tier 2* (above 200 ADA)			
Up to 1 Gbps			
1 Gbps - 5 Gbps			
5 Gbps - 10 Gbps			
URL/Web Filtering price per P-2 ADA			
QSS/Laserfiche access only without Internet via fiber (actual cost)			
QSS/Laserfiche access only without Internet per VPN (actual cost)			
Technician Services (Non-Engineering Services)/hour			
Engineering Services/hour			
Total			

*Palo Alto vSys Firewall, technical support for core hardware, IP addresses for districts, and external DNS hosting included with Internet access as a bundled service at no additional cost.

TECHNOLOGY SERVICES

Additional Technology Services available listed below. Contact Burt Lo for more in information:

On-Site Support for End Users (LEA staff and students)

- Contact Technology & Learning Resources for pricing
- Includes:
 - Help Desk Ticket System

Network Hardware Infrastructure Support Services

- Contact Technology & Learning Resources for pricing
- Includes:
 - Planning, budgeting, technology reviews, and alignment with district goals
 - Patching and service packs for network hardware
 - Documentation and Reporting on infrastructure
 - Emergency after-hours support for critical business systems
 - Attendance at district management and technology meetings
 - Troubleshooting LAN/WAN issues

Systems Hardware Infrastructure Support Services

- Contact Technology & Learning Resources for pricing
- Includes:
 - Planning, budgeting, technology reviews, and alignment with district goals
 - Attendance at district management and technology meetings
 - Server maintenance and patch management
 - Backup system configuration, monitoring, and maintenance
 - Server monitoring and alerting
 - Endpoint protection and monitoring
 - Endpoint patch management and servicing

Acct. #	Amount
Total	

2022-23 MASTER AGREEMENT

SIGNATURE PAGE

TOTAL OF MASTER AGREEMENT \$_____

District/Department

Stanislaus County Office of Education

School District Name

Scott Kuykendall
Stanislaus County Superintendent of Schools

By:
Superintendent

By:
Julie A. Betschart, Deputy Superintendent,
Business Services

Date

Date

Contact Person

Contact Phone



COVID Safety Plan (CSP)

Updated February 24, 2022
GREAT VALLEY ACADEMIES
3200 Tully Road, Modesto CA 95350



Great Valley Academy Charter Schools

Number of schools: 2

Total Enrollment: 1,627

Great Valley Academy-Modesto
3200 Tully Road
Modesto, CA 95355

Great Valley Academy-Salida
5901 Sisk Road
Modesto, CA 95356

Superintendent (or equivalent) Name: Leah Silvestre Franklin
3200 Tully Road
Modesto, CA
95350

Phone Number: (209)576-2283
Email: l.silvestre@greatvalleyacademy.com

Cleaning and Disinfection

Great Valley Academies provides the following related to cleaning and ventilation/air flow:

- All classroom, office and shared spaces are cleaned nightly
- Includes desks, chairs, tables, hard surfaces, high touchpoints
- Disinfectant spray, towels and gloves are available in every classroom, and high use areas
- Bathrooms are disinfected nightly
- Playground equipment is disinfected nightly
- Water fountains are closed; water filling stations are used, with disposable cups available to students without water bottles
- HVAC filters are all MERV 11 and are changed bi-monthly
- HVAC units are equipped with Bipolar Ionization Air Purifiers
- Doors and windows will be left open for improved air flow, as practicable

Entrance, Egress and Movement Within the School

- Volunteers and visitors are suspended (with the exception of service providers) to be reinstated in 2022 (dependent on local case rates)
- Student drop off and pick up is staff supervised; parents remain in vehicle, students escorted in/out of the vehicle and directed to classrooms/vehicle
- Parents arriving on campus for student drop off or pick up (outside of drop off/pickup process), must wear a face covering

Face Coverings and Other Essential Protective Gear

GVA follows the California Department of Public Health's (CDPH) face covering guidelines:

Age	Face Covering Requirement
under 2 years old	No
2 years old – 12 th grade	Yes

- Students are provided a face covering if needed
- All staff are required to wear a face covering unless they are instructing students in a way their mouth needs to be visible (speech, special education, English learner support, younger students), in which case, they may wear a face shield with drape (addressed on a case by case basis)
- Following CDPH guidance, students who are not exempt from wearing a face covering and choose not to wear one will be referred to an independent study program
- Students that are certified medically exempt are required to wear a shield with drape
- Face coverings can be removed for eating, drinking and outdoor activities
- Food Service Staff must wear gloves in addition to face covering

Healthy Hygiene Practices

- Signage is prominently displayed at school sites reminding individuals of proper hygiene protocols
- Hand sanitizer is available upon entry to school campuses
- Each classroom and common area has access to hand sanitizer
- Routines are established in support of frequent handwashing
- Handwashing or use of hand sanitizer will occur
 - upon entry to any instructional area
 - before and after eating
 - before and after recess
 - before and after PE activity
- Additional handwashing stations have been added at multiple strategic locations on each campus
- Restrooms are stocked with soap and paper towels, supplies will be checked and refilled nightly and during the school day

Health Screenings for Students and Staff

- GVA Staff and students are directed to complete self-screening prior to arriving on campus
- GVA staff and students are directed to stay home and see a health care provider if they experience any flu like symptoms
- Get tested for COVID when symptoms are compatible
- Students exhibiting symptoms are immediately sent to the office where they will be screened and will remain in a sick room until they can be picked up
- Sick room is disinfected after each use
- Staff exhibiting symptoms are sent home
- If student or staff is confirmed with a positive test result, GVA will work with Stanislaus County Public Health department and will communicate as appropriate with school community

Isolation and quarantine for students and staff

- For students: see Student Isolation and Quarantine Flowchart (included)
- For staff: see Staff Isolation and Quarantine Table (included)

Testing of Students and Staff

- GVA students exhibiting symptoms are immediately sent to the office where they are screened and remain in a sick room until they can be picked up, GVA then refers them to COVID 19 testing per CDPH guidelines. Receiving a negative test result is the fastest path to return to class.
- GVA staff have access to self-testing supplies and can access when recommended or needed for unvaccinated or vaccinated employees
- Unvaccinated GVA staff will also undergo weekly COVID surveillance testing provided by GVA

Identification and Tracing of Contacts

- GVA works in consultation with the Stanislaus County Public Health Department on topics including but not limited to group contact tracing of confirmed positive cases and provision of communication with those contacts as appropriate
- GVA participates in Shared Portal for Outbreak Tracking (SPOT) a local & statewide system which tracks absenteeism & positive cases.
- GVA conducts group contact tracing and communication with those who were in shared indoor airspace with someone who has tested positive
- GVA confidentially tracks both staff and student positive cases, data to include (not limited to) positivity determination date, return to campus date, and other relevant details
- GVA confidentially tracks both staff and student indoor classroom locations, related follow up and status
- Designated staff contact information provided to the Stanislaus County Public Health Department
 - Chief Executive Officer, Leah Silvestre Franklin
 - Chief Operating Officer, Marisa Meeks
- GVA follows the CDPH guidelines for measures to be taken when student or staff member have symptoms, was indoors with someone who has the virus or tests positive with the virus

Staff Training and Family Education

- All staff are trained on cleaning protocols, face covering requirements, COVID 19 response, staff testing availability, hygiene practices, student illness protocol, student screening and visitor/volunteer suspension
- Families continue to receive ParentSquare communication regarding safety plans and ongoing updates
- In coordination with the Stanislaus County Public Health Officer, affected stakeholders will be notified via Email and ParentSquare regarding potential virus exposure

Reporting, Recordkeeping, and Access

It is our policy to:

- Report information about COVID-19 cases at our workplace to the local health department, and provide any related information requested by the local health department
- Report immediately to Cal/OSHA any COVID-19-related serious illnesses or death, as defined under CCR Title 8 section 330(h), of an employee occurring in our place of employment or in connection with any employment
- Maintain records of the steps taken to implement our COVID-19 Prevention Protocol
- Make our COVID-19 Prevention Protocol available to employees, and to representatives of Cal/OSHA upon request
- Use GVA database to keep a record of and track all COVID-19 cases; information may be made available as required by law, with personal identifying information removed

Communication Plans

- GVA communicates with Stanislaus County Public Health any positive case information received
- In coordination with the Stanislaus County Public Health Officer, GVA uses our Email, and ParentSquare posts to communicate with affected stakeholders of potential virus exposure. This communication will be consistent with legal counsel guidance regarding the Family Educational Rights and Privacy Act.
- GVA Chief Executive Officer, Chief Operating Officer or Human Resources representative communicate directly with affected staff members

COVID-19 Isolation Flowchart

For K-12 Schools



Isolation: Separating those who have COVID-19 from those who are not infected.

Isolation Day 0: The day the student developed symptoms or tested positive.

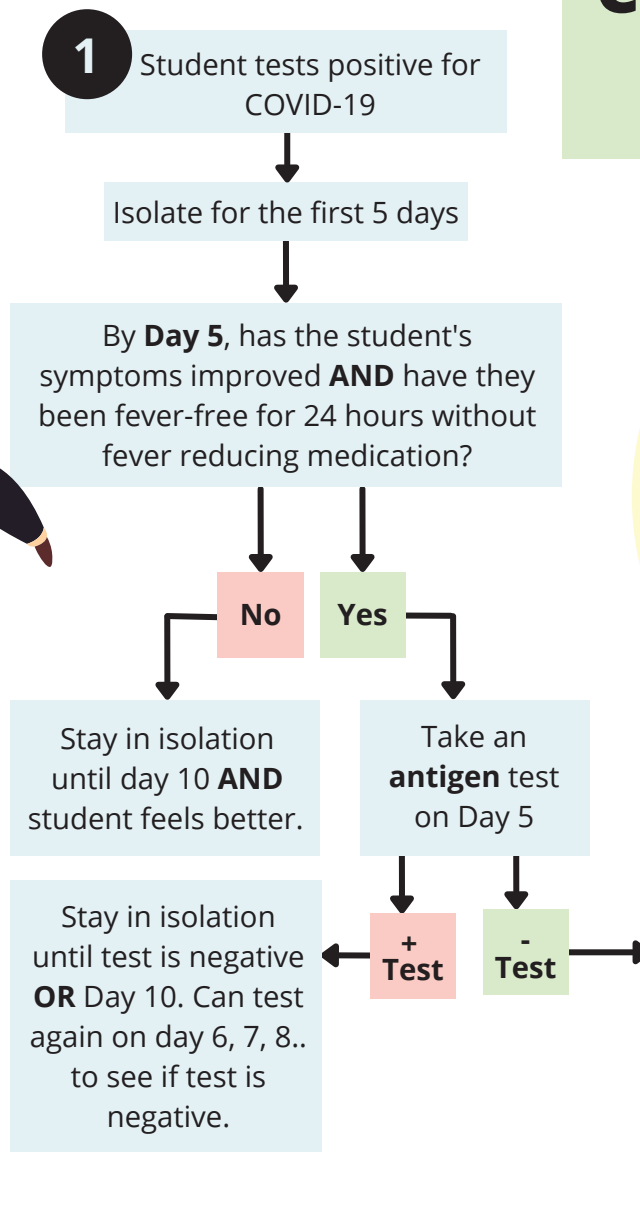
Isolation Day 1: The day AFTER symptoms started (if student has symptoms) OR test date (if no symptoms).

Quarantine: Separating those who were exposed to COVID-19 from others in case they become infected.

Quarantine Day 0: The last day the student was exposed to a COVID-19 positive person.

Quarantine Day 1: The day AFTER exposed to a COVID-19 positive person.

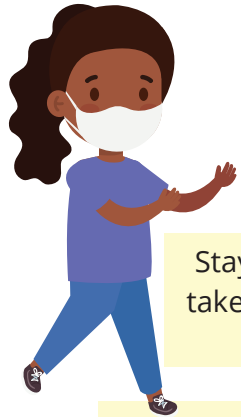
Asymptomatic: Student has no symptoms of COVID-19.



The student can return on **Day 6** if they're able to mask in **all environments** through Day 10.

The student can return to all extracurricular activities **as long as they can meet the masking requirement (activities where masks can't be worn must be avoided).**

COVID-19 Quarantine Flowchart For K-12 Schools Group Tracing Method



1 Student was exposed at school (regardless of vaccination status)

Does the student have symptoms?

Stay home and take a COVID-19 test

Yes

No

The student can continue going to school and participating in extracurricular activities.

Students should get tested 3-5 days after exposure.
Students who test positive should follow the Isolation Flowchart.

**NOTE ON HOME EXPOSURES

Typically, a person is exposed to someone with COVID-19 and then they quarantine away from them. However, there are times when a student is exposed to a person who can't isolate from them (ex. the student's parent has COVID-19 and needs to care for the student). In that case, the student will be continuously exposed to someone who is contagious.

To stop the spread of COVID-19, the student will need to stay home during the positive person's isolation and then quarantine starting the day after that person's isolation ends.



2

Student is exposed at home

Does the student have symptoms?

Yes

No

Stay home and COVID-19 test

Is the student vaccinated or COVID + in last 90 days?

Yes

No

No quarantine needed.

*Mask at home & everywhere else for 10 days. Test on day 5.

Can the positive person isolate from the student/household?
**see note on home exposures

No

Yes

The student **must stay home** while the person with COVID-19 is isolating.
The student's Day 1 of quarantine is the day after the COVID positive person ends isolation.

Quarantine for 10 days. Can test on Day 5 to try to return sooner.

Choose to test on Day 5

+ Test

- Test

Student should isolate and follow the Isolation Flowchart

Student can return to school on Day 6.



Staff Isolation and Quarantine Guidance

Vaccination Status	Isolation or quarantine	Period of time to be excluded from work
All workers that test positive for COVID-19, regardless of vaccination status	Isolation	<ul style="list-style-type: none"> • Must be excluded from the workplace for at least 5 days • A worker can return to work <u>after</u> day 5 if they do not have symptoms <u>and</u> test negative. • If a worker cannot test or declines to test they can return to work <u>after</u> 10 days. • Must wear a face covering around others at work for a total of 10 days after the positive test.
Unvaccinated workers exposed to someone with COVID-19	Quarantine	<ul style="list-style-type: none"> • Must be excluded from the workplace for 5 days after the close contact <u>and</u> take a test on day 5. • A worker can come back to work <u>after</u> day 5 if they test negative and do not have any symptoms. • If the worker cannot test or declines to test they can return to the workplace after day 10 if they do not have symptoms. • Must wear a face covering around others at work for 10 days after exposure. • If the worker develops symptoms, they must be excluded pending a test result.
Booster-eligible, but not boosted workers exposed to someone with COVID-19	No quarantine	<ul style="list-style-type: none"> • Does not need to be excluded from work if asymptomatic but must have a negative test 3-5 days after close contact. • Must wear a face covering around others at work for 10 days after exposure. • If they develop symptoms, the worker must be excluded from the workplace pending a test result.
Workers received a booster, or are fully vaccinated but not yet booster-eligible exposed to someone with COVID-19	No quarantine	<ul style="list-style-type: none"> • Does not need to be excluded from work if asymptomatic, but must have a test <u>on day 5</u> after exposure. • Must wear a face covering around others at work for 10 days after exposure. • If they develop symptoms, the worker must be excluded from the workplace pending a test result.



Item c.

Approval to update Covid Safety Plan to reflect the most recent California Department of Public Health (CDPH) K-12 schools guidance (as it is released)



Item d.

Approval to change date of March Board Meeting from Monday March 28th to Tuesday March 29th @ 5:30 p.m.

Great Valley Academy Modesto
January 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Jan 22	Jul 21 - Jan 22	Feb 22-Jun 22	Feb 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	3,936,293	4,230,218	3,453,354	3,159,428	8,290,756	7,389,646	7,389,647
8100 · Federal Revenue	234,501	407,666	890,611	717,447	1,300,605	1,125,113	1,125,113
8300 · Other State Revenues	542,217	22,720	383,550	903,048	630,743	925,768	925,768
8600 · Other Local Revenue	247,629	242,012	22,371	27,988	458,500	270,000	270,000
8700 · Selpa	237,642	275,642	225,398	187,398	463,040	463,040	463,040
Total Income	5,198,283	5,178,258	4,975,284	4,995,309	11,143,644	10,173,567	10,173,567
Gross Profit	5,198,283	5,178,258	4,975,284	4,995,309	11,143,644	10,173,567	10,173,567
Expense							
1000 · Certificated Salaries	1,963,841	1,986,632	1,863,451	1,840,661	3,906,294	3,827,293	3,827,292
2000 · Classified Salaries	1,146,426	1,191,176	1,205,051	1,160,300	2,231,245	2,351,476	2,351,476
3000 · Employee Benefits	812,489	815,745	975,189	971,933	1,705,219	1,787,678	1,787,678
4000 · Books & Supplies	581,206	594,212	381,424	368,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	744,727	789,820	620,398	575,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	50,335	58,365	25,365	78,000	75,700	75,700
7430 · All Other Financing Uses	123,702	123,702	123,677	123,677	247,379	247,379	247,379
Total Expense	5,389,725	5,551,621	5,227,554	5,065,659	11,008,402	10,617,280	10,617,280
Net Ordinary Income	-191,443	-373,363	-252,270	-70,350	135,241	-443,713	-443,713

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,379.49	P1 5,709,810.84	5,695,898.92	5,850,614.91	5,602,577.49	5,158,852.45		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00		468,305.23	237,350.19	237,350.19	237,350.19	237,350.19	(230,955.04)	3,207,708.94
EPA Funding	8012		0.00	534,335.00				534,336.00	604,207.69				604,207.68	69,871.69	2,346,958.06
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	270,932.00	135,466.40	142,239.92	142,239.92	142,239.92	142,239.92	142,239.92	1,693,330.00
Selpa Prop Tax	8097							0.00						141,650.00	141,650.00
Federal IDEA	8181													118,486.00	118,486.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	0.00	34,420.00	34,420.00	34,420.00	34,420.00	34,420.00	98,801.78	414,821.00
Title 1, Part A	8290							0.00						117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				23,653.00	162,398.26		162,398.26			58,721.98	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	0.00	1,800.00	1,800.00	1,800.00	1,400.00	1,000.00	3,602.89	22,000.00
Educator Effectiveness	8550													251,726.00	251,726.00
Mandated Cost Reimb	8550							15,255.00						0.46	15,255.46
Lottery	8560							65,433.41			39,889.35			39,165.33	144,488.09
Lottery, prop 20	8561										0.00			28,808.98	57,617.95
In Person Inst Grant 7422	8590		0.00	0.00				198,847.65					28,808.98	0.35	198,848.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							94,922.00						77,664.00	172,586.00
Other	8590							201,250.00					11,629.00	(154,633.00)	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			1,567.37	833.33	833.33			48,155.12	(734.04)	5,000.00
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	1,189.00	4,000.00				(47,970.12)	3,811.00	52,500.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	23,026.70	14,000.00	14,000.00	14,000.00	14,000.00	12,206.57	(9,026.70)	210,000.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,026.48	1,401.32	800.00	800.00	800.00	800.00	751.57	(601.32)	7,500.00
Selpa	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	90,000.00	45,000.00	45,000.00	45,000.00	45,398.00	(45,000.00)	463,040.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	904,854.69	1,431,813.45	912,023.22	1,080,651.13	677,897.72	475,210.11	1,118,196.90	711,305.27	10,173,567.00
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	316,887.27	339,677.73	339,677.73	339,677.73	339,677.73	504,739.67	0.00	3,827,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	158,090.27	202,840.45	202,840.45	202,840.45	202,840.45	393,688.94	0.00	2,351,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	142,489.32	145,745.20	145,745.20	145,745.20	145,745.20	392,208.60	0.00	1,787,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	71,994.19	85,000.00	85,000.00	85,000.00	85,000.00	41,424.30	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	79,906.85	125,000.00	125,000.00	125,000.00	125,000.00	120,397.76	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	0.00	10,000.00	10,000.00	10,000.00	3,000.00	25,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	52,989.64	0.00	247,379.00
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	787,039.66	925,935.14	925,935.14	925,935.14	918,935.14	1,530,813.91		10,617,279.89
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,335.25	644,773.79	(13,911.92)	154,715.99	(248,037.42)	(443,725.03)	(412,617.01)	711,305.27	(443,712.89)
Accruals Received		73,335.00		1,100,107.07				59,845.00							1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82	(216,187.44)							
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,379.49	5,709,810.84	5,695,898.92	5,850,614.91	5,602,577.49	5,158,852.45	4,746,235.45		

Great Valley Academy Salida
January 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Jan 22	Jul 21 - Jan 22	Feb 22-Jun 22	Feb 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	3,634,268	4,221,882	3,532,271	2,944,657	7,646,195	7,166,539	7,166,539
8100 · Federal Revenue	212,612	368,275	721,091	565,428	974,454	933,703	933,703
8300 · Other State Revenues	429,795	18,574	362,371	773,592	598,889	792,166	792,166
8600 · Other Local Revenue	112,870	111,798	97,130	98,202	327,500	210,000	210,000
8700 · SELPA	228,124	263,825	200,287	164,586	428,411	428,411	428,411
Total Income	4,617,669	4,984,355	4,913,150	4,546,464	9,975,449	9,530,819	9,530,819
Gross Profit	4,617,669	4,984,355	4,913,150	4,546,464	9,975,449	9,530,819	9,530,819
Expense							
1000 · Certificated Salaries	1,798,289	1,818,359	1,852,838	1,832,767	3,663,528	3,651,126	3,651,126
2000 · Classified Salaries	943,567	968,632	929,097	904,032	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	817,038	824,108	814,347	807,278	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	498,432	514,219	355,663	339,876	967,595	854,095	854,095
5000 · Services & Other Operating Exp	731,632	759,280	551,703	524,055	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	209,090	209,090	184,822	184,822	393,912	393,912	393,912
Total Expense	5,057,361	5,153,001	4,727,156	4,631,517	9,816,985	9,784,518	9,784,518
Net Ordinary Income	-439,693	-168,646	185,994	-85,053	158,464	-253,699	-253,699

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,934,902.97	3,967,972.43	3,903,213.32	3,797,438.20		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	0.00	958,525.18	548,010.20	548,010.20	548,010.20	548,010.20	(410,514.98)	5,701,597.00
EPA Funding	8012	0.00	0.00	42,546.00		0.00	0.00	42,546.00		37,054.67				(5,491.33)	153,710.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	188,042.00	94,020.56	98,721.29	98,721.29	98,721.29	98,721.29	98,721.29	1,175,257.00
Selpa Prop Tax	8097							0.00						135,975.00	135,975.00
Federal IDEA	8100-8299												0.00	115,665.00	115,665.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	0.00	33,500.00	33,500.00	33,500.00	34,094.97	33,417.18	68,189.94	375,044.68
Title 1	8290				0.00								74,205.00	0.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			16,660.64	14,912.00		102,384.88				192,633.73	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	0.00	1,300.00	1,300.00	1,300.00	1,300.00	699.48	3,054.54	19,000.00
Educator Effectiveness	8550							174,749.00						43,687.00	218,436.00
Mandated Cost Reimb	8550							14,644.00					0.00	0.68	14,644.68
Lottery	8560							62,886.81			41,610.97			34,205.44	138,703.22
Lottery, prop 20	8561										0.00			55,311.10	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00				137,889.30					0.00	(0.30)	137,889.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							79,655.00						65,172.00	144,827.00
Other	8590												0.00	58,355.00	58,355.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	1,506.37	400.00	400.00	400.00	400.00	400.00	53,075.31	5,000.00
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,350.27	16,666.67	16,666.67	16,666.67	16,666.67	16,666.67	7,492.48	200,000.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	2,187.96	800.00	800.00	800.00	800.00	4,492.57	(1,387.96)	10,000.00
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	0.00	35,700.92	35,700.92	35,700.92	35,700.92	21,782.41	35,700.92	428,411.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	806,680.17	186,135.88	1,281,842.56	735,368.71	1,140,913.32	874,538.62	776,710.04	735,694.04	835,449.45	549,844.86	9,530,818.93
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	301,292.22	321,362.06	321,362.06	321,362.06	321,362.06	567,389.44	0.00	3,651,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	139,526.68	164,592.04	164,592.04	164,592.04	164,592.04	270,728.62	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	132,182.99	139,252.38	139,252.38	139,252.38	139,252.38	257,337.94	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	64,846.53	80,632.89	80,632.89	80,632.89	80,632.89	33,130.95	0.00	854,094.70
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	78,111.25	105,759.79	105,759.79	105,759.79	105,759.79	128,664.21	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	65,342.11	0.00	393,912.00
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	745,829.66	841,469.15	841,469.15	841,469.15	841,469.15	1,361,279.66		9,784,517.75
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	63,290.15	(588,846.46)	430,890.31	(10,460.95)	299,444.17	33,069.47	(64,759.12)	(105,775.11)	(525,830.21)	549,844.86	(253,698.82)
Accruals Received		25,326.89	55,932.54	2,082,840.92	68,009.97			118,006.70							2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,934,902.97	3,967,972.43	3,903,213.32	3,797,438.20	3,271,608.00		

Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. We continue to use these formats to communicate and solicit input on what’s working, what’s not working and what additional supports/resources would be most impactful.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Not Applicable, our number of unduplicated pupils is less than 55%.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. In the current school year, we facilitated one educational partner survey in October and will facilitate an additional survey in the spring. We continue to use these formats to communicate and solicit input on what’s working, what’s not working and what additional supports/resources would be most impactful.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

GVA is using these and other funds to:

- *provide character education and supports
- *provide mental health services to students
- *provide additional in class academic and social emotional supports

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

GVA continues to use fiscal resources in support of students:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping students in class
- *additional in class and out of class academic and social emotional supports
- *access to mental health services
- *expanding access to take home reading (more books!)
- *dedicated resources in support of English learners, student with exceptional needs, students experiencing socioeconomic challenges, foster youth and students experiencing homelessness
- *free breakfast and lunch for all students

GVA continues to use fiscal resources in support of staff:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping staff at work
- *access to mental health services
- *provision of new teacher support (dedicated resources)

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Modesto LCAP Outcome & Expenditure Supplement 2021.2022

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
CAASPP ELA 2019	47% meet/exceed standards	Not applicable 2021
CAASPP Math 2019	37% meet/exceed standards	Not applicable 2021
NWEA-MAP 2021 Math	71% made growth	Not yet available
NWEA-MAP 2021 Reading	64% made growth	Not yet available
NWEA-MAP 2021 Language	64% made growth	Not yet available
ELPAC 2019 English learners making progress towards proficiency	68% made progress towards proficiency	Not yet available
EL Reclassification rate 2019	28% of English learners will be reclassified	Not yet available

Metric	Baseline	Mid-Year 1 Outcome
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.8	Not yet available
Teacher misassignment rate	0% for charter schools	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.92	Not yet available
Implementation of English language development standards-Academic self-reflection tool 2021	Average rating of items 1-3 (ELD only) 3.00	Not yet available
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not yet available

Actions

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$25,000	\$52,865
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	\$1,125
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	\$84,377
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$277,630	\$94,578
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use	\$25,000	\$5,092
6	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$62,800	\$26,616
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	\$500
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$46,600	\$19,789
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$10,000	\$0

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$249,900	\$113,153
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$369,800	\$178,171

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
Attendance rate-2019	94.9%	96.2% 2020-2021
Chronic absenteeism rate-2019	8.1%	9.8% 2020-2021
Suspension rate-2019	2.1%	.1% 2020-2021
Expulsion rate-2019	0%	0% 2020-2021
Jr. High dropout rate-2019	0%	0% 2020-2021
Parents report feeling welcome on campus-2021 family survey	94%	Not yet available
Parents report child is happy to come to school always/most of the time -2021 family survey	97%	Not yet available
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	87%	Not yet available
Parents are engaged- Parent Engagement Self Reflection Tool 2021	Average = 3.4	Not yet available

Actions

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	\$0
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	\$4,200
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$52,000	\$20,510
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$49,000	\$19,585
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$73,350	\$33,470
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$80,600	\$55,957
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$50,973	\$26,004

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Not Applicable, our number of unduplicated pupils is less than 55%.

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Salida LCAP Outcome & Expenditure Supplement 2021.2022

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
CAASPP ELA 2019	46% meet/exceed standards	Not applicable 2021
CAASPP Math 2019	33% meet/exceed standards	Not applicable 2021
NWEA-MAP 2021 Math	67% made growth	Not yet available
NWEA-MAP 2021 Reading	69% made growth	Not yet available
NWEA-MAP 2021 Language	78% made growth	Not yet available
ELPAC 2019 English learners making progress towards proficiency	49% made progress towards proficiency	Not yet available
EL Reclassification rate 2019	46% of English learners will be reclassified	Not yet available

Metric	Baseline	Mid-Year 1 Outcome
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.6	Not yet available
Teacher misassignment rate	0% for charter schools	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.8	Not yet available
Implementation of English language development standards-Academic self-reflection tool 2021	Average rating of items 1-3 (ELD only) 2.0	Not yet available
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not yet available

Actions/Expenditures

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$25,000	\$43,865
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	\$1,305
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	\$66,203
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$160,000	\$66,777
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use, and part time library staff	\$36,500	\$0
06	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$62,800	\$26,616
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	\$500
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$41,600	\$19,789
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$10,000	\$2,470

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$282,900	\$138,084
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$291,022	\$124,377

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
Attendance rate-2019	95.07%	96.16% 2020-2021
Chronic absenteeism rate-2019	9.1%	9.3% 2020-2021
Suspension rate-2019	2.6%	.1% 2020-2021
Expulsion rate-2019	0%	0% 2020-2021
Jr. High dropout rate-2019	0%	0% 2020-2021
Parents report feeling welcome on campus-2021 family survey	96%	Not yet available
Parents report child is happy to come to school always/most of the time -2021 family survey	95%	Not yet available
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	93%	Not yet available
Parents are engaged- Parent Engagement Self Reflection Tool	Average = 2.9	Not yet available

Actions/Expenditures

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	\$0
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	\$1,998
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$52,000	\$18,597
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$49,000	\$19,351
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$39,600	\$16,007
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$46,470	\$42,343
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$47,800	\$23,730

Regular Meeting of the Board of Trustees

March 29, 2022, 5:30 pm

Great Valley Academy

1209 Woodrow Ave. Suite A-4

Modesto, CA 95350

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

- i. Letter to GVA Board of Directors

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order to participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

c. MODESTO PRINCIPAL'S REPORT

d. SALIDA PRINCIPAL'S REPORT

e. HOMESCHOOL PRINCIPAL'S REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a.** Approval of the Minutes of the Regular Board Meeting of February 28, 2022

f. ACTION ITEMS

- a.** Approval of Fiscal Policy Manual Revision
- b.** Approval of Modesto 2022/2023 Academic Calendar
- c.** Approval of Salida 2022/2023 Academic Calendar
- d.** Approval of Classified Holiday Schedule
- e.** Approval of Classified Salary Schedule
- f.** Approval of Certificated Teacher Salary Scale
- g.** Approval of Certificated Administrator Salary Schedule
- h.** Acceptance of CEO's Resignation Letter
- i.** Approval of Modesto Updated Safety Plan
- j.** Approval of Salida Updated Safety Plan
- k.** Approval of CEO Compensation Comparability Study

g. INFORMATION AND DISCUSSION

- a.** Monthly Financials

h. FUTURE AGENDA ITEMS

- a.** NEXT REGULAR BOARD MEETING- Monday April 25, 2022

~1209 Woodrow Ave., Suite A4 Modesto CA

i. FINAL ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.

3/20/22

Dear board of directors and administrators,

As a member of the leadership committee and dedicated employee of GVA these past 11 years, I feel compelled to suggest some ideas to support teacher retention. GVA is student-centered, but in a trying year, and with all of the efforts we take to train quality teachers, I had some ideas that I would like to share for our school's future.

GVA strives to be innovative and thoughtful in our teaching practices, but many teachers are experiencing burnout and are looking for relief. Some considerations that can support retaining quality teachers are a competitive, unit-based salary, reduced contractual hours, increased prep or break times, a 4 day school week, and a common prep for grade levels to collaborate and lesson plan.

With inflation and the cost of living rising, staff are struggling with GVA's pay scale. Teachers with master's degrees and units above their credential are not being compensated for their extra professional development units, as many districts do. I am hopeful that a new salary schedule is in the works and that GVA can retain their hard-working, qualified staff.

Reducing contractual hours or moving to a 4 day work week can improve teacher retention. Other bell schedules, like this one, below, from Ripon elementary, have students released as early as 2:00, even with beginning instruction 30 minutes before GVA Salida does. Many teachers are currently on campus until 4:00, holding dismissal for 45-50 minutes, then walking students-not-picked-up to Kids Care.



9:49

TK-3 Bell Schedule	
8:15	Classroom Instruction begins
9:40-10:00	Recess (TK-3)
11:15 -12:00	TK-2 Lunch
12:05-12:50	3rd Lunch
2:00	Dismissal

4-8 Regular and Minimum Bell Schedule	
8:15	Classroom Instruction begins
10:05-10:20	Recess (4-8)
12:05-12:50	4-5 Lunch
12:30-1:15	6-8 Lunch
2:00	Dismissal (Monday & Wednesday only)
2:50	Dismissal (Tuesday, Thursday & Friday)

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Some days, teachers at GVA have only one 40 minute break. In junior high's case, on the Salida campus, it's not until after 2:00 that this break happens. Our teaching staff has to rely on support staff and administrators to come watch our class while we use the restroom, get water, or heat up our lunches. Modesto City schools has it in their contract that their breaks should be "equivalent to one student instructional period" For GVA that

would be 55 minutes a day. That doesn't even include the lunch or recess break that Modesto City School teachers get, that we do not.

Having a common prep period for teachers at a grade level ensures quality collaboration. Teachers are currently scrambling to collaborate through text, email, google documents, after contracted hours, or even at recesses. If we moved to a 4 day work week, we could use the 5th day for professional development and team collaboration. Teachers can be thoughtful about data collection, reteaching and enriching their many levels of student needs in academics, and can complete SSTs, IEPs and 504s during this 5th day.

I fully trust your decision-making process and enjoy working with my staff. I struggle to watch my coworkers burnout and did not want to miss an opportunity to share some possible solutions to a problem that I see on our campus. Thank you for reading this and any consideration that you make to continue to support our staff.

Megan Barajas

5% teacher

GVA Salida

Leadership position: Culture Cultivator

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Feb.22- Mar. 15

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	79.857	92.79	79.568	88.50
1	72	66.375	92.18	68.697	89.28
2	78	72.187	92.98	77.174	90.30
3	91	86.312	94.64	88.287	90.20
4	90	84.375	92.84	85.734	89.95
5	72	68.187	94.44	70.378	89.68
6	92	85.500	92.83	85.863	89.00
7	101	96.187	95.04	96.159	91.21
8	72	67.687	92.62	70.704	91.77
Total	753	706.687	93.43	722.568	90.00

2. Key Accomplishments:

Clubs

40 Book Challenge (124 students have meet 40 books)

Live Broadcast of Assemblies- student run

Spirit Days- Read Across America and Wacky Day

Continued Yearlong SCOE Math Trainings, RAMP Assessment Alignment/Review

Continued Yearlong SCOE Science Trainings, Grade Level Planning Sessions

Lottery for Enrollment 22-23

SCOE Math Walks

3. Upcoming Key Events/Activities:

Eagle Project- Planter Benches

Former GVA Students active role in High School Leadership

Former GVA Student- President of Senior Class at Beyer High School

Book Bags for K-3 students

Jog-A-Thon - May

Great Valley Academy Salida

Charter School Monthly Summary Report

March 29, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

March ADA dates are: 03/1-03/21

YTD Dates are: 08/10/21-03/21/22

Grade	Enrollment	ADA	ADA %	ADA	YTD ADA
K	80	72.8	91.00	74.45	88.89
1	95	90.30	94.31	90.52	89.80
2	89	82.80	93.09	83.15	89.89
3	99	93.00	93.93	92.08	89.93
4	86	79.40	92.32	80.50	89.37
5	90	86.10	95.66	87.02	90.14
6	89	81.50	91.57	84.63	90.10
7	81	75.90	93.70	72.85	89.25
8	80	73.10	91.26	73.19	89.15
Total	789	734.90	93.04	738.40	89.64

2. Key Accomplishments:

- a. March 2nd – 9th: Lucky Grams fundraiser for drama
- b. March 4th: Enrollment lottery
- c. March 11th: Spirit Day – Favorite Character
- d. March 14th – 18th: Spring Break
- e. March 21st: After school club launch
- f. March 23rd: Collaborative Coffee
- g. March 24th: Salida Leadership meeting
- h. March 30th: Academic and character report cards sent home

3. Upcoming Key Events/Activities:

- a. April 4th: NWEA testing begins
- b. April 28th: Salida Leadership meeting
- c. April 28th: Collaborative Coffee
- d. April 30th: Spirit Day – 50s Day

Great Valley Academy Homeschool

Charter School Monthly Summary Report

March 29, 2022

Reporting Dates: 1/4/2022-2/25/2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	9	8.1	98	7.4	99
1	10	9.2	92	9.4	95
2	10	6.6	94	6.2	96
3	2	1.6	84	1.9	95
4	12	9.3	99	9.6	99
5	5	5	100	3.9	100
6	9	7.6	92	6.6	94
7	8	5.5	84	5.4	92
8	8	6.9	95	7.2	98
Total	73	60	94	57.9	97

2. Key Accomplishments:
 - a. March 1st—Homeschool Parent Orientation
 - b. March 3rd—Enrichment: Science Experiment Presentations
 - c. March 4th-- GVS Staff Training with Dr. Rosenow
 - d. March 9th--Trimester 2 Report Cards sent home
 - e. March 10th-- Physical Fitness Testing - Conditioning Day at Davis Park
 - f. March 11th—Assignment Work Record #7
 - g. March 18th—Lexia Core5 Training
3. Upcoming Key Events/Activities:
 - a. March 31st—Enrichment Spirit Day—College/Career Day; Physical Fitness Test
 - b. April 1st—Lexia PowerUp Training
 - c. April 5th—Homeschool Parent Orientation
 - d. April 6th—Spring NWEA Testing begins
 - e. April 14th—Assignment Work Record #8
 - f. April 29th—Spring NWEA Testing ends

Chief Operating Officer's Report
March 29, 2022
Board Meeting



Process and Policy Updates

- ❖ Develop Federal Funding Policies for Compliance – For Board Review
- ❖ National School Lunch Program Audit for Salida – Complete
- ❖ Updating to New CDPH Isolation & Quarantine Guidelines – Complete
- ❖ Annual Civil Rights Reporting – Complete
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ Certificated Salary Schedule – For Board Review
- ❖ Classified Salary Guide – For Board Review
- ❖ Marketing Collateral for 2022 Enrollment Season – Complete
- ❖ Social Media Campaigns for 2022 Enrollment Season – Complete
- ❖ Staff Recruitment Marketing for 22/23 – In Progress
- ❖ Evaluate Additional Medical Benefit Options for Staff – In Progress
- ❖ Restructuring Kids' Care Programs – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Managing COVID contact tracing – Ongoing
- ❖ Launch of SchoolWise Parent Portal – April 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ February 2022
 - ❑ 3,423 Users Visited (92% New/8% Returning)
 - ❑ 10,962 Page Views
 - ❑ Users Averaged 1:41 Minutes on the Site
 - ❑ 64.02% Mobile – 32.88% Desktop – 3.10% Tablet
 - ❑ Type: Organic 52.7% – Direct 22.3% – Referral 2.1% – Social 22.9%

Training

- ❖ Governor's Budget Workshop – May 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing

Chief Executive Officer's Report
March 29th, 2022
Board Meeting



State Accountability

- No data available (no testing 2020/21)
- NWEA data coming in Spring

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021 (virtual attendance)
- Governor's budget virtual conference: January 2022 + May 2022

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program-good participation
 - Intentional outreach to prior families-some response
 - Marketing collateral, delivered to area preschools
 - Enrollment meetings in progress-Lottery March 4th, 2022
- Facilitation of CEO replacement process



Homeschool

- Ongoing support of principal
 - Principal search 3.2022
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans to be approved March 29, 2022



Founders Report
Great Valley Academy School Board
March 29, 202

The Great Valley Smart staff have done a wonderful job covering for each other when someone is absent and being flexible when student group sizes change.

Vision screenings for staff and on campus students continue to be done on a weekly basis. Having the opportunity to see students in GVS 4 days per week on both campuses has been very positive. We have been able to graduate more students out of the GVS program, making room for other students in need.

We have been working closely with the home school staff and families. We have been doing weekly staff trainings. As a result I have been able to do visual evaluations on more of the home school students and, when necessary, we have placed some of them into the GVS intervention program.

Trainings have continued with the GVS staff and they continue to gain more knowledge in how to improve visual skills in GVA students.

I am pleased with the progress of the GVS staff to eventually do student evaluations and to establish training programs for students that need GVS intervention. They can also aid teachers in understanding the importance of visual skills for successful learning.

Eldon Rosenow, Founder

**GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
February 28, 2022**

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Susan Nisan, Twila Tosh, Vince Jamison

Members Absent: None

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Mike Ruehle, Russ Howell, Tarah Heilman, Dr. Eldon Rosenow

Audience Present: Several staff, parents and community members

Call to Order: Mr. Payne welcomed everyone and called the meeting to order.

Communications: **COMMUNICATIONS**

Written

Communications: Nigro & Nigro 2021 Audit letter

Public Participation: A few parents spoke about or had questions regarding the mask mandate being lifted.

Modesto Principal

Report: Mr. Ruehle spoke about 2 culminating events that were held last week. One was a 3rd grade xylophone event and the other a 7th grade medieval event. Both were very cool!

Salida Principal

Report: Mr. Howell spoke about the afterschool clubs that would be beginning after Spring Break.

Homeschool Principal

Report: Mrs. Heilman reported on physical fitness testing and what they are doing in preparation for the test. Tarah has spent time with a high school P.E coach and has hosted conditioning days at Davis Park with some of the students. Testing will be on the Modesto campus.

Chief Operating

Officer's Report: Mrs. Meeks spoke about enrollment season. The lottery was to be held on Friday March 4th. Modesto Kinder is at capacity and Salida is close to capacity. There have been 48 direct recommendations to GVA from parents!

Chief Executive

MINUTES

Regular Meeting of the Board

February 28, 2022

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Officer's Report:

Ms. Silvestre Franklin reported that Covid positivity was down last week and ADA is returning to normal! There continues to be updates to the Covid Safety Plan as state guidelines change including the revocation of the mask mandate in schools effective March 14, 2022.

Founder's Report:

Dr. Rosenow reported that the GVS team continues to work diligently on a 6 week rotation schedule which allows them to be more effective.

Approval of Agenda/

Order of Agenda:

The motion was made by Ms. Tosh, seconded by Mr. Jamison, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mr. Jamison, seconded by Mrs. Meraz approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Action Items:

ACTION ITEMS

a. The motion was made by Mrs. Nisan, seconded by Ms. Tosh approving the 2022-2023 SCOE Master Agreement. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

b. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Updated Covid Safety Plan. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

MINUTES

Regular Meeting of the Board

February 28, 2022

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NOES: None

ABSENT: None

ABSTENTIONS: None

c. The motion was made by Mrs. Meraz, seconded by Mr. Payne for approval to update Covid Safety Plan to reflect the most recent California Department of Public Health (CDPH) K-12 schools guidance (as it is released). A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

d. The motion was made to by Ms. Tosh, seconded by Mr. Jamison for approval to change the Monday March 28, 2022 Board Meeting to Tuesday March 29, 2022. A roll call vote was taken.

AYES: Payne, Meraz, Jamison, Nisan, Tosh

NOES: None

ABSENT: None

ABSTENTIONS: None

Information and Discussion:

Monthly Financials

Both campuses on target to meet budget.

Modesto LCAP supplement

Salida LCAP supplement

Ms. Silvestre Franklin explained what is included in the supplements and how the results came to be.

Future Agenda Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Tuesday March 29, 2022

~1209 Woodrow Ave., Suite A4 Modesto CA

Adjournment:

The meeting was adjourned at 6:19 p.m. and the Board moved to Closed Session

Re-open General Session:

Mr. Payne reported that no action was taken in closed session.

Adjournment:

Adjourned general session at 6:34 p.m.

Fiscal Policies and Procedures Manual

Published June 2019
Revised September 2019
Revised March 2022

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OVERVIEW

The School Board of GREAT VALLEY ACADEMY has reviewed and adopted the following financial policies and procedures. These policies and procedures are to allow the most effective use of GREAT VALLEY ACADEMY funds to support the mission and to ensure that the funds are budgeted, accounted for, expended, and maintained appropriately.

1. The School Board formulates financial policies and procedures, delegates administration of the policies and procedures to the Chief Executive Officer and reviews operations and activities on a regular basis.
2. The Chief Executive Officer has responsibility for all operations and activities related to financial management.
3. The School Board maintains the responsibility of approving the annual school budget, budget revisions, interim reports and year-end unaudited actuals.
4. Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
5. All documentation related to financial matters will be completed by computer or ink.
6. A state-approved auditing firm will provide an independent audit of all finance, payroll and attendance operations. The School Board will approve the final audit report, and a copy will be provided to the charter authorizer(s). Any audit exceptions and/or findings will be resolved to the satisfaction of the School Board and charter authorizer(s).
7. The School Board can appoint a designee to perform the Chief Executive Officer's responsibilities in the case of absence.

ANNUAL FINANCIAL AUDIT

1. The annual audit will be conducted in two parts, once in the spring of the current school year and again in fall of the following school year in order to meet the state audit report submission deadline of December 15th.
2. A final version of the audit report must be presented to the School Board prior to submission deadline.
3. Great Valley Academy will annually contract for the services of an independent state-certified and approved public accountant to perform an annual fiscal audit.
4. The audit shall include, but not be limited to:
 - a. An audit of the accuracy of the financial statements.
 - b. An audit of the attendance accounting and revenue accuracy practices.
 - c. An audit of the internal control practices.
 - d. An audit of the accuracy of the payroll practices.
 - e. An audit of the National School Lunch Program funds.
 - f. An audit of all federally funded programs when threshold is met.
5. After six consecutive fiscal years, Great Valley Academy will contract with a new audit firm or require a change/rotation in audit partners in the seventh year.
6. The audit firm will prepare Great Valley Academy's annual federal tax form 990. Tax forms are to be filed no later than May 15 of the year following the fiscal year end.
7. The completed form 990 will be approved by the School Board prior to filing.

ACCOUNTING PROCEDURES

This section covers the basic accounting procedures for Great Valley Academy. The accounting procedures by Great Valley Academy conform to Generally Accepted Accounting Principles (GAAP) to ensure accuracy of information and compliance with external standards.

Basis of Accounting

Great Valley Academy use the accrual-basis of accounting at year-end, meaning that revenues are recorded when earned, and expenses are recorded when a liability is incurred regardless of when the receipt or payment of cash takes place.

1. Throughout the fiscal year, revenue is recorded in the month in which it is received and expenses recorded in the month in which they occur.
2. At the close of the fiscal year, all revenue earned in the fiscal year, but not received is accrued. All expenses that have been incurred but not paid are also accrued. This ensures that the year-end financial statements reflect all revenue earned and all expenses incurred during the fiscal year.
3. Year-end books, inclusive of adjusting journal entries, are closed by September 15th, the date by which the unaudited actuals must be submitted to the charter authorizer(s) and respective reporting agencies.

PURCHASING

Segregation of Duties

Key Employees by Title

- A. Chief Executive Officer
- B. Chief Operating Officer
- C. Department Manager/Principal/Teacher
- D. Program Manager, Multi-Campus Operations
- E. Attendance Clerk
- F. Finance Manager
- G. Accounting Technician
- H. Accounting Clerk

Purchasing & Receiving Functions	A	B	C	D	E	F	G	H	Notes
Approves purchases	X	X	X						
Places orders				X					
Receives goods purchased					X				
Submits received paperwork					X				
Reconciles receiving paperwork								X	
Reviews invoices for accuracy							X		
Approves invoices for payment						X			
Oversees bidding requirements	X	X		X					
Approves disbursements						X			

Authorization Levels

1. All purchases must receive authorization prior to the purchase. The following matrix provide signature authorization levels based on type and amount of purchase.

Type of Purchase	Total Amount of Purchase	Quote Requirements	Purchase Type	Signature Authority
Maintenance/Facilities Credit Card Purchase	\$.01 - \$500	Not required	All CC purchases must have all receipts attached to CC report prior to submittal to Accounting.	Credit Card Holder
Maintenance/Facilities Credit Card Purchase	\$501 - \$5,000	Not required	All CC purchases must have approval prior to purchase. All receipts, invoices and packaging lists must be submitted to Accounting.	Requester & Campus Administrator
Cardholder Credit Card Purchase – used by the cardholder for purchases	\$.01 - \$5,000	Not required		Credit Card Holder
Teacher Classroom and/or Elective Purchase	Varies up to approved budget schedule	Not required	N/A	Requester
General Supply Purchase – used for those items requiring constant replenishment	\$.01 - \$1,000	Not required	Purchase Requisition or Equivalent	Requester & Program Manager
General Purchase	\$.01 - \$5,000	Not required	Purchase Requisition or Equivalent	Requester & Campus Administrator
General Minor Purchase	\$5,001 - \$14,999	Written quote or online shopping cart	Purchase Requisition or Equivalent	Requester, Campus Administrator & Chief Operating Officer
General Major Purchase	Greater than \$15,000 *Greater than \$25,000	Written quote or online shopping cart. *Over \$25,000 requires three written quotes.	Purchase Order or Equivalent	Requester, Campus Administrator, Chief Operating Officer & Chief Executive Officer
General Multi-Campus Support Purchase	\$.01 - \$500	Not required	Purchase Requisition or Equivalent	Requester & Department Head
General Multi-Campus Support Purchase	\$501 - \$14,999	Written quote or online shopping cart	Purchase Requisition or Equivalent	Requester, Department Head & Chief Operating Officer
Major Multi-Campus Support Purchase	Greater than \$15,000 *Greater than \$25,000	Written quote or online shopping cart. *Over \$25,000 requires three written quotes.	Purchase Order or Equivalent	Department Head, Chief Operating Officer & Chief Executive Officer

General Federal Purchase	\$.01 - \$4,999	Not required	Purchase Requisition or Equivalent	Requester & Campus Administrator
Federal Micro Purchase	\$5,000 - \$9,999	Written quote or online shopping cart	Purchase Requisition or Equivalent	Requester, Campus Administrator & Chief Operating Officer
Federal Major Purchase	\$10,000 - \$99,999	Written quotes from at least three qualified sources	Purchase Requisition or Equivalent	Requester, Campus Administrator & Chief Operating Officer & Chief Executive Officer
Federal Super Purchase	\$100,000 - \$249,999 *Greater than \$250,000	Written quotes from at least three qualified sources. *Over \$250,000 requires formal competitive bid process per guidance in the federal compliance supplement.	Purchase Requisition or Equivalent	Requester, Campus Administrator & Chief Operating Officer & Chief Executive Officer & School Board

2. Single source vendors (i.e., curriculum) may waive the three written quote process, if approved by the Chief Operating Officer.
3. The Chief Executive Officer or designee may sign contracts within the approved budget. The School Board must review all contracts over \$100,000.
4. Purchase requisitions, authorizing the purchase of items, as listed above, must be signed by the respective authorizer and submitted with all related documentation.
5. When approving purchases, the authorizer must:
 - a. Determine if the expenditure is budgeted.
 - b. Determine if funds are currently available for expenditures (i.e. cash flow).
 - c. Determine if the expenditure is allowable under the appropriate revenue source.
 - d. Determine if the expenditure is appropriate and consistent with the vision, approved charter, school policies and procedures, and any related laws or applicable regulations.
 - e. Determine if the price is competitive and prudent. All purchases over \$5,000 must include documentation of a good faith effort to secure the lowest possible cost for comparable goods or services.
 - f. If a purchase will cause the budgeted category to exceed \$15,000 of the current budget, the Chief Executive Officer or designee must approve.
6. Individuals who use personal funds to make unauthorized purchases will not be reimbursed. Authorized purchases will be promptly reimbursed by a bank check upon receipt of appropriate documentation of the purchase.
7. The Chief Executive Officer may authorize an individual to obtain a school credit card to make authorized purchases on behalf of the school. Individuals are assigned their own credit card from the school account.
 - a. The primary school card copies will be kept under locked supervision in the Data Administrator/Purchasing office.
 - b. If receipts are not available or are “missing”, the individual making the charge will be held responsible for payment.
 - c. Primary credit cards will bear the names of both Great Valley Academy and the Founder.
 - d. Debit cards are not allowed.

8. For all federal funding purchases, requisitioner and authorizer must screen vendors for suspension and debarment prior to entering into a contract or bid approval. Vendor screening can be verified at <https://sam.gov/content/exclusions>

Contracts

1. Consideration will be made of in-house capabilities to accomplish services before contracting for them.
2. Multi Campus Support will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000.
 - a. Competitive bids will be obtained as deemed appropriate and in the best interests of the school.
3. Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors).
 - a. Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Chief Executive Officer may also require that contract service providers list the school as an additional insured.
4. If the contract service provider is a sole proprietor or a partnership (including LP, and LLP), the contract initiator will obtain a W-9 from the contract service provider prior to submitting any requests for payments to Accounting.
5. If the contract service provider is a sole proprietor performing services on campus, he/she must also submit to a Department of Justice Live Scan clearance using the Great Valley Academy approved form.
6. The Chief Executive Officer will approve proposed contracts and modifications in writing.
7. Contract service providers will be paid in accordance with approved contracts as work is performed.
8. The Chief Operating Officer will be responsible for ensuring the terms of the contracts are fulfilled.
9. Potential conflicts of interest will be disclosed upfront, and the Chief Executive Officer, Chief Operating Officer, Founder and/or Member(s) of the School Board with the conflict will excuse themselves from discussions and from voting on the contract.

CASH MANAGEMENT

Segregation of Duties

Key Employees by Title

- A. Chief Executive Officer
- B. Chief Operating Officer
- C. Founder
- D. Department Manager/Principal/Teacher
- E. Program Manager, Multi Campus Operations
- F. Attendance Clerk
- G. Finance Manager
- H. Accounting Technician
- I. Accounting Clerk

Cash Receipt Functions	A	B	C	D	E	F	G	H	I	Comments
Opens mail									X	
Distributes mail									X	
Reconciling payments								X		
Prepares bank deposit for approval								X		
Makes bank deposit									X	

Records deposit							X			
Cash Disbursement Functions	A	B	C	D	E	F	G	H		Comments
Enters Checks for Payment								X		
Prepares Checks							X			
Signs Checks	X	X	X							
Counter Signs Checks	X		X							
Approves disbursements		X								
Reconciles bank accounts							X			
Approves bank reconciliations		X								
Maintains cash disbursement journal							X			
Approves monthly cash disbursement		X								

Petty Cash

1. The Finance Manager will administer the petty cash fund.
2. The petty cash fund will be capped at \$750 unless authorized by Chief Operating Officer to exceed capped amount.
3. For remote campuses, the Office Manager will be responsible for managing petty cash transactions.
4. All petty cash will be kept in a locked petty cash box in a locked drawer or safe combination. Only the Office Manager and Finance Manager (or Chief Operating Officer designee in case of absence) will have keys to the petty cash box and drawer or combination.
5. All disbursements will require a completed and signed petty cash form. A register receipt for all purchases must be attached to the petty cash form.
6. The Office Manager and Finance Manager will insure that the petty cash form is properly completed and that a proper receipt is attached.
7. At all times the petty cash box will contain receipts, cash disbursement slips or cash totaling \$750. A register receipt must support the petty cash form. The individual using the petty cash to make a purchase is responsible for submitting the receipt for the petty cash slip to the Finance/Office Manager within 48 hours of withdrawing the petty cash.
8. When expenditures total \$500 (when cash balance is reduced to \$250), the Finance/Office Manager will total the disbursements and complete a petty cash reimbursement form. This should be done on at least a monthly basis. The petty cash and reimbursement forms with supporting receipts will be attached to the reconciliation summary sheet and forwarded to the Finance Manager.
9. Petty cash fund reimbursement checks will be made payable to Accounting Clerk because banking institutions require a person not a business in order to cash the check. Once check is cashed, the money is taken to the respective manager to verify the count and replenish the petty cash box.
10. Any irregularities in the petty cash fund will be immediately reported in writing to the Chief Operating Officer.
11. Advance disbursements totaling no more than \$300 are allowed to be made from the petty cash fund.
12. At no time should the Finance/Office Manager reimburse themselves from the petty cash system without obtaining a secondary authorization.
13. The Chief Operating Officer will conduct periodic audits of the petty cash fund.
14. The Chief Operating Officer will review and approve all petty cash reconciliations.

Cash Advances

1. An employee may request a cash advance to make a purchase that cannot be made through the standard purchasing process.

2. All cash advances will require a complete and signed cash advance form that includes the employee and manager's signatures.
3. Once the purchase is made, a register receipt for all purchases must be submitted to be attached to the cash advance form.
4. The employee returns the receipts and any unused funds to the respective manager.
5. The Officer Manager and Finance Manager will insure that purchases and unused funds total the original advance. All documentation is filed with the cash disbursement log.
6. If the funds must be advanced via check, the employee must complete a check request form signed by the employee and the manager.
7. Once the purchase is made, a register receipt for all purchases and any unused funds must be returned to the Finance Manager.
8. The Finance Manager will insure that the proper receipt is attached and all unused funds match.

Cash Investments

1. Refer to Addendum A – Cash Investment Policy. This policy is School Board approved.

ACCOUNTS PAYABLE

Bank Check Authorization

1. All original invoices will immediately be forwarded to the Accounting Department.
2. The Accounting Clerk will carefully review each invoice, attach all supporting documentation, and verify that the specified services and/or goods were received. When receiving tangible goods from a vendor, the person designated to receive deliveries should trace the merchandise to the packing list and note any items that were not in the shipment.
3. The packing list should be submitted to the Accounting Department with the invoice. Accounting Clerk will adjust the invoice for any missing items noted on the packing list before processing for payment.
4. Once verified for completion by the Accounting Technician, he/she will stamp an account string on the invoice and complete the required account coding information, including noting the specific budget line item that is to be charged for the specified expenditures. The invoice and supporting documentation will be sent to the Finance Manager on an as needed basis to insure prompt processing of invoices. The Finance Manager will then process the invoices, with sufficient supporting documentation, for payment.

Bank Checks and Electronic Payments

1. The School Board will approve, in advance, the list of authorized signers on the bank accounts. The Chief Executive Officer, the Chief Operating Officer, President of the Board, Founder, and any other employee authorized by the School Board may sign bank checks.
2. Check signing limitations include one authorized signer for all check values under \$1,000 and two authorized signers for all check values \$1,000 and over.
3. The School Board is authorized to open and close bank accounts and may delegate these responsibilities to the Chief Executive Officer or designee.
4. The Finance Manager is responsible for all blank checks and will keep them under lock and key.
5. When there is a need to generate a bank check, the Finance Manager will prepare the check. In the event of absence, Chief Operating Officer may authorize hand-written checks to be submitted for recording purposes.
6. Under no circumstance will any individual sign a blank check.

7. Under few circumstances, electronic/online payments may be necessary. All electronic/online payments must follow the same authorization levels as bank checks prior to payment submittal online.
8. Once electronic/online payment is made by the Finance Manager, proof of payment must be submitted to the Chief Operating Officer for verification.
9. The Finance Manager will record the check transaction(s) and/or electronic/online payment(s) into the appropriate bank register and in the general ledger.
10. The Accounting Clerk will distribute the checks and vouchers as follows:
 - a. Original – mailed or delivered to payee
 - b. Voucher – attached to the invoice and filed by vendor name
 - c. Bank Check Copies – filed monthly with bank statements
 - d. Voided checks will have the signature line cut out, shredded and will have VOID written in ink. The original check will be added to the Finance Manager's voided check file.

Credit Card Statement Reconciliation Process

This process provides detail on the requirements to reconcile the campus credit card statements to show proof of purchase, approval and receipt of goods.

Modesto Campus & Homeschool Credit Card Purchases

1. No later than the close of business on Tuesday of each week, the Finance Manager provides the Accounting Clerk with an emailed spreadsheet of the previous week's credit card charges. This is downloaded directly from the credit card site and provides the date, vendor, purchase (or credit) amount, credit card used and space for notations.
2. The Accounting Clerk prints the spreadsheet and begins to locate the required invoices and receipts to substantiate each charge on the list.
3. If the Accounting Clerk has the required documentation, he/she places a ✓ next to the line item on the spreadsheet to indicate the invoice is received, stamped, complete and attached to the weekly spreadsheet.
4. If the Accounting Clerk does not have the required documentation within 10 days of the charge, he/she highlights the line item on the spreadsheet to indicate the documentation has not been received or that there is an open issue with the purchase.
 - a. The Accounting Clerk will begin the process of researching the charge to identify who made the purchase. Once the purchaser has been identified, the Accounting Clerk will make verbal contact with the purchaser to inquire about the required receipt and/or invoice. The date and to whom the contact was made will be noted next to the line item on the spreadsheet.
 - b. If the purchaser does not immediately provide the required receipt and/or invoice, the Accounting Clerk will allow 48 hours for the documentation to be provided by the purchaser. If the documentation has not been received within 48 hours, the Accounting Clerk will send a reminder e-mail to the purchaser with a carbon copy to the Finance Manager asking that the documentation be provided by 12:00pm the following business day. The email date will be noted next to the line item on the spreadsheet.
 - c. If the purchaser does not provide the required receipt and/or invoice by the time frame provided in the email, the Accounting Clerk will notify the Finance Manager via email that there has been no response to the request for the documentation. This email date will be noted next to the line item on the spreadsheet.

- d. The Finance Manager will lead the inquiry process to receive any outstanding documentation to complete the credit card reconciliation.
 - e. Any other relevant information regarding the process of locating the required receipt and/or invoice will be noted next to the line item on the spreadsheet.
 - f. Once all open issues have been resolved, the highlighted items may be struck through with a single line (~~abcdefg~~) to indicate all issues have been resolved.
 - g. Post-it notes can be used by the Accounting Clerk as place holder reminders but all information regarding the correspondence to obtain documentation must be noted on the weekly spreadsheet by line item.
5. Once the official credit card statement is received in the mail, each transaction will be numbered starting with 1 and progressing chronologically until each statement item is numbered.
 6. The spreadsheet line items marked with a ✓ are transferred as back-up to the credit card statement. These line items will now be marked with an X to indicate that all documentation requirements have been met for credit card processing.
 - a. All invoices and/or receipts should be stamped, completed with information indicated on the stamp, and numbered in accordance with the credit card statement.
 7. At least 7 days prior to the credit card billing due date, the complete packet is provided to the Finance Manager by the Accounting Clerk. All open issues should be clearly highlighted and notated on the corresponding weekly spreadsheet.
 - a. The Finance Manager reviews the completed packet for accuracy and inquires on any open issues. The Finance Manager indicates his/her review by dating and initialing the credit card statement.
 - b. Upon the approval of the Finance Manager, the packet is reviewed by the Chief Operating Officer for approval prior to payment. The Chief Operating Officer indicates his/her review by dating and initialing the credit card statement.
 - c. Upon approval of the Chief Operating Officer, the credit card is paid via online Electronic Funds Transfer (EFT) on or before the credit card billing due date.
 8. Once payment is made, the Finance Manager provides the credit card statement and corresponding documentation to the Accounting Technician for data entry into the general ledger.
 9. Upon completion of data entry, the Finance Manager verifies all general ledger coding and posts the credit card transactions within the financial management system. The credit card statement and corresponding documentation is returned to the accounting office for filing.

Salida Campus

1. No later than the close of business on Tuesday of each week, the Finance Manager provides the Attendance Clerk with an emailed spreadsheet of the previous week's credit card charges. This is downloaded directly from the credit card site and provides the date, vendor, purchase (or credit) amount, credit card used and space for notations.
2. The Attendance Clerk prints the spreadsheet and begins to locate the required invoices and receipts to prove each charge on the list.
3. If the Attendance Clerk has the required documentation, he/she places a ✓ next to the line item on the spreadsheet to indicate the invoice is received, stamped, complete and attached to the weekly spreadsheet.
4. If the Attendance Clerk does not have the required documentation within 10 days of the charge, he/she highlights the line item on the spreadsheet to indicate the documentation has not been received or that there is an open issue with the purchase.

- a. The Attendance Clerk will begin the process of researching the charge to identify who made the purchase. Once the purchaser has been identified, the Attendance Clerk will make verbal contact with the purchaser to inquire about the required receipt and/or invoice. The date and to whom the contact was made will be noted next to the line item on the spreadsheet.
 - b. If the purchaser does not immediately provide the required receipt and/or invoice, the Attendance Clerk will allow 48 hours for the documentation to be provided by the purchaser. If the documentation has not been received within 48 hours, the Attendance Clerk will send a reminder e-mail to the purchaser with a carbon copy to the Finance Manager asking that the documentation be provided by 12:00pm the following business day. The email date will be noted next to the line item on the spreadsheet.
 - c. If the purchaser does not provide the required receipt and/or invoice by the time frame provided in the email, the Attendance Clerk will notify the Finance Manager via email that there has been no response to the request for the documentation. This email date will be noted next to the line item on the spreadsheet.
 - d. The Finance Manager will lead the inquiry process to receive any outstanding documentation to complete the credit card reconciliation.
 - e. Any other relevant information regarding the process of locating the required receipt and/or invoice will be noted next to the line item on the spreadsheet.
 - f. Once all open issues have been resolved, the highlighted items may be struck through with a single line (~~abc defg~~) to indicate all issues have been resolved.
 - g. Post-it notes can be used by the Attendance Clerk as place holder reminders but all information regarding the correspondence to obtain documentation must be noted on the weekly spreadsheet by line item.
5. Once complete, the Attendance Clerk notifies the Accounting Clerk that information is ready for pick-up in the weekly cross-campus information transfer.
 6. The Accounting Clerk reviews the packet of documentation for any notated items and continues to follow-up with the Attendance Clerk until all documentation is received.
 - a. The Accounting Clerk will make notations as to the follow-up dates made to the Attendance Clerk.
 7. Once the official credit card statement is received in the mail. Each transaction will be numbered starting with 1 and progressing chronologically until each statement item is numbered.
 8. The Accounting Clerk will verify all invoices and/or receipts are stamped, completed with information indicated on the stamp, and numbered in accordance with the credit card statement.
 9. At least 7 days prior to the credit card billing due date, the complete packet is provided to the Finance Manager by the Accounting Clerk. All open issues should be clearly highlighted and notated on the corresponding weekly spreadsheet.
 - a. The Finance Manager reviews the completed packet for accuracy and inquires on any open issues. The Finance Manager indicates his/her review by dating and initialing the credit card statement.
 - b. Upon the approval of the Finance Manager, the packet is reviewed by the Chief Operating Officer for approval prior to payment. The Chief Operating Officer indicates his/her review by dating and initialing the credit card statement.
 - c. Upon approval of the Chief Operating Officer, the credit card is paid via online Electronic Funds Transfer (EFT) on or before the credit card billing due date.
 10. Once payment is made, the Finance Manager provides the credit card statement and corresponding documentation to the Accounting Technician for data entry into the general ledger.

11. Upon completion of data entry, the Finance Manager verifies all general ledger coding and posts the credit card transactions within the financial management system. The credit card statement and corresponding documentation is returned to the accounting office for filing.

Bank Reconciliation

1. Bank statements will be submitted directly, unopened, to the Finance Manager.
2. The Finance Manager will examine all paid checks for date, name, cancellation, and endorsement. Any discrepancies regarding the paid checks or any checks over 90 days will be researched and if applicable voided from the accounting system, and replaced if appropriate.
3. The Finance Manager will prepare the bank reconciliation, verifying the bank statements and facilitating any necessary reconciliation.
4. The Finance Manager will compare the reconciled bank balance to the cash in the bank account and to the general ledger, immediately reporting any material discrepancies to the Chief Operating Officer.
5. The Finance Manager will prepare monthly bank reconciliation documents to be approved by the Chief Operating Officer.

ACCOUNTS RECEIVABLE

Cash Receipts (Cash and Checks)

1. For each cash collection, a receipt or document of the transaction will be issued to the payer as documentation of cash paid.
2. Each person authorized for collecting cash or checks will provide a detail listing and documentation to the Accounting Technician of all money received and prepared for deposit.
3. All cash and checks must be prepared for deposit and delivered to the Accounting Technician on a weekly basis.
4. All cash counting documentation must have two signatures indicating that the person who collected the money and an independent party verified the amount collected.
5. The Accounting Technician and responsible party will recount and reconcile the amount received with the supplied supporting documentation, each will sign for approval and the Accounting Technician will place the cash into an envelope and seal it.
6. Reconciled cash receipts will be kept in the safe awaiting deposit.
7. Accounting mail (including anything official such as government notices, invoices and checks) received at the school must be opened by the Accounting Clerk and stamped with a "received" stamp.
8. Once a week, the Accounting Technician will scan deposits prepared to the Accounting network drive. Copies of the deposits with deposit (see Deposits) receipts will be sent to the Finance Manager for posting in the general ledger.
9. When utilizing merchant or online web contribution services, the Chief Operating Officer must approve in order to establish appropriate protocol for handling bank transfers, reconciliations and reporting. The Finance Manager should perform reconciliation of transaction records to bank records for deposits.

PayPal

1. Certain fundraisers throughout the school year utilize an electronic payment system. Great Valley Academy subscribes to PayPal Merchant Services.
2. When funds are received through PayPal, the Chief Operating Officer reviews the PayPal account on a weekly basis to run cash receipt reports and transfer funds to the respective campus bank account.
3. Reports are provided to the Finance Manager for cash receipt recording.
4. The Finance Manager reviews the cash receipt reports against bank account deposits to verify deposits.

5. The fundraiser chairperson will provide a complete transaction report of all donations made through the online giving system to the Finance Manager for reconciliation against the PayPal reports, cash/check deposits, and bank account deposits from PayPal.

Deposits

1. All cash and check receipts are compiled by the Accounting Technician on an as needed basis for depositing. All deposits will itemize the amount, source, and purpose of each check or cash payment received. (See Cash Receipts)
2. Once compiled, all deposits are transferred to the Accounting Clerk for deposit slip generation and check endorsement (e.g. For Deposit Only Great Valley Academy).
3. Once deposit slips are completed, all deposit information is transferred to the Accounting Technician once a week for scanning to the Accounting network drive.
4. Once scanned, the deposit packet is retrieved by the Accounting Clerk for physical depositing at the bank on a weekly basis.
5. The Accounting Clerk will make the deposit and attach the deposit receipt to the deposit packet.
6. The Finance Manager will reconcile the cash receipts to the deposit slip and the bank statement as part of the monthly close process.

Returned Check Policy

1. A \$25 returned-check processing fee will be charged for checks returned as non-sufficient funds (NSF). Unless otherwise pre-approved by the Chief Operating Officer, payment of the NSF check and processing fee must be made by cash, money order or certified check.
2. In the event that a second NSF check is received for any individual, in addition to the processing fee, the individual will lose check-writing privileges. Payment of the NSF check, the processing fee and any subsequent payment(s) by that individual must be made by cash, money order or certified check.
3. In the case of NSF checks written by parents of students, failure to pay may result in the loss of privileged services such as Kids' Care or withholding of goods purchased such as spirit wear, yearbooks, etc. until payment is received, unless other mutually agreeable arrangements are approved by the Chief Operating Officer.
4. If unsuccessful in collecting funds owed, the school may initiate appropriate collection and/or legal action.

Kids' Care

1. Enrollment into the Kids' Care program requires a non-refundable registration fee. Fee is determined and published each school year.
2. Continued enrollment in the Kids' Care program cannot be allowed if fees remain unpaid. All unpaid fees must be satisfied prior to registration for a new school year or summer session of Kids' Care.
3. Drop-in care deposits are required until March of the current school year. Accounts are credited with the drop-in care deposit amount. When Kid's Care services are used, the account is debited and credit balance is reduced.

Payments

1. All Kids' Care payments are due on or before the 1st of each month and prior to holidays and weekends.
2. Payments received after the 1st of the month will be subject to a late fee regardless of account balance.
3. Additional services including holiday care and minimum day fees are due at the time space is reserved for the additional service. A late fee will be applied to accounts not paid on time.

4. Past due accounts will receive a courtesy reminder notification that their account must be paid by the 10th of the month in order to avoid account suspension.
5. If payments are not received by the 10th of the month, Kids' Care services will be suspended. The Kids' Care System Administrator will disable the check-in account pin number.
6. A list of disabled accounts is provided to the Accounting Technician so further collection efforts can be made.
7. Accounts must be paid in full including all late fees before Kids' Care services can be resumed.
8. Kids' Care monthly rate billings will continue even if the student is not in attendance for non-payment. A 14 day cancellation notice must be provided by the account holder if they would like services and fees to stop.
9. Payment arrangements may be granted upon account review.

Additional Charges

1. Any student not picked up by 6:00pm will be charged a \$3.00 for each minute past 6:00pm. An increase of \$4.00 per minute will be charged for the 2nd/3rd occurrence. A 3rd/4th occurrence may result in dismissal from the program.
2. The Kids' Care Director may grant a one-time exception for the 1st late occurrence.
3. The Accounting Technician must be notified of the late pick-up by the Kids' Care staff no later than one business day from occurrence so charges may be billed promptly.

Collection Protocols

1. 2 – 10 days late – reminder e-mail/suspension potential
2. 16 – 30 days late – reminder phone call/notice of suspension
3. 31 – 44 days – mailed letter/continued suspension
4. 45 – 60 days – mailed letter with urgent plea/continued suspension
5. 60+ days – mailed certified letter and notice of collections/continued suspension

EXPENSES

Cash Expenses/Reimbursements

1. Great Valley Academy will reimburse pre-authorized school-related expenses that are accompanied by an original receipt and meet the guidelines set forth within this policy.
2. An employee or school volunteer seeking to make a school-related purchase must obtain pre-approval from their Supervisor.
3. Once the purchase is completed, the employee or volunteer must submit a cash reimbursement request form (See Addendum C) with the original receipt(s), sign the form and obtain the signature of their supervisor.
4. The completed form is submitted to accounting for processing. Incomplete forms or forms without original receipts will not be processed and will be returned to the requestor for further review.
5. Only in rare circumstance may a cash reimbursement request be submitted to the Chief Operating Officer for review and determination of payment outside the standard requirements of the policy.
6. Reimbursement checks are processed within 10 business days of receipt.
7. The organization reserves the right to refuse reimbursement of any inappropriate expenses made.
8. Under no circumstance will the organization reimburse purchases of alcohol, lottery tickets, and tobacco. All questionable items must be directed to the Chief Operating Officer for review.

Travel Expenses/Reimbursements

1. All school-related travel must be pre-approved by the employee's Supervisor.
2. Mileage reimbursement will be at the current, published IRS rate for business travel.
3. For the purposes of mileage reimbursement, where a trip is commenced or terminated at the employee's home, the distance traveled shall be reduced by the employee's home-to-office commute distance.
4. Employees will be reimbursed for overnight stays at hotels/motels when pre-approved by a Supervisor and the event is more than 50 miles from either the employee's residence or the school site. Room rates will be negotiated at the lowest level possible, including the corporate, nonprofit or government rate if offered, and the lowest rate available.
5. Employees are expected to room share with another employee in order to save company financial resources. However, an employee may pay the room rate difference to stay in a private room.
6. Employees will be reimbursed for meals at the limits indicated below:
 - a. \$7.00 for breakfast
 - b. \$11.00 for lunch
 - c. \$23.00 for dinner

These rates are not per-diem and are only expensed based on providing original receipts. See (Addendum D) for reimbursement guidelines.
7. Employees may not claim meals if a meal is included in hotel expenses, conference fees, or is otherwise provided as part of your travel. Snacks and continental breakfasts such as rolls, juice, and coffee are considered to be meals.
8. Transportation expenses such as airfare will be purchased at the lowest rate available.
9. Employees should utilize bus/shuttle service or ride sharing whenever possible.
10. Employees should choose between long-term parking or car service/taxi on whichever is the more economical for the organization.
11. The organization encourages selecting accommodations within walking distance of conference or event to avoid rental car expenses. Rental cars must be pre-approved by the Chief Operating Officer prior to reserving.
12. Upon conclusion of the trip, the employee must enter all of the appropriate information on the travel reimbursement form (See Addendum D), attach original receipts, and submit to their Supervisor for signature.
13. The completed form is submitted to accounting for processing. Incomplete forms or forms without original receipts will not be processed and will be returned to the requestor for further review.
14. Only in rare circumstances may a travel reimbursement request be submitted to the Chief Operating Officer for review and determination of payment outside the standard requirements of the policy.
15. Reimbursement checks are processed within 10 business days of receipt.
16. The organization reserves the right to refuse reimbursement of any inappropriate expenses made.
17. Under no circumstance will the organization reimburse purchases of alcohol, lottery tickets, tobacco, personal items, etc. All questionable items must be directed to the Chief Operating Officer for review.

School Board Expenses

1. The individual incurring authorized expenses while carrying out the duties of the school board will complete and sign the appropriate reimbursement form and attach original receipts.
2. The Chief Executive Officer or designee will approve and sign the reimbursement form, and return to the requestor for submission to accounting for payment.

FINANCE

Budget

1. By June 1st of each year a proposed budget must be completed by the Chief Operating Officer including the upcoming school year and multi-year projections for three additional years.
2. Upon review by the Chief Executive Officer, budget adjustments are completed and submitted to the Chief Operating Officer.
3. The final proposed budget is presented to the School Board at the previously scheduled end of June board meeting.
4. Upon approval, the approved budget is submitted to the Charter Authorizers by July 1st.
5. Upon final state budget approval, school budget is reviewed for potential modifications. If modifications are required, a revised budget is presented to the school board no later than the August board meeting, unless the final California State budget is delayed.
6. Throughout the school year or in the event of major income or expense changes, the budget may be revised within the operating school year by the Chief Operating Officer and submitted to the Chief Executive Officer.
7. Upon review by the Chief Executive Officer, budget adjustments may be approved and submitted to the school board for budget revision approval.

Financial Statement Reporting

Monthly Board Reports

1. The Finance Manager will submit monthly board reports to the Chief Operating Officer 10 days prior to the scheduled board meeting.
2. The monthly board reports will consist of a Cash Flow Statement and a year to date comparison report defined by the Chief Executive Officer.

Interim Reports

1. Interim Report packages submitted to the authorizer are to include the Charter School Alternative Interim Report, the current Local Control Funding Formula calculator, the Multi Year Projection with budget narratives, Cash Flow, current financials, bank statements, signed Certification page by the Chief Executive Officer, authorizer checklist, and any other documentation requested by the authorizer.
2. The First Interim Reports is to be submitted to the Chief Operating Officer by the Financial Manager for review 10 days prior to the scheduled December board meeting. GVA uses the Charter School Alternative First Interim Report. It includes all financial information through October 31 of the current fiscal year as recorded on a cash basis. The report is to be reviewed and submitted to the board for approval and submitted to the school authorizer by December 15.
3. The Second Interim Report is to be submitted to the Chief Operating Officer by the Financial Manager for review 10 days prior to the scheduled February board meeting. GVA uses the Charter School Alternative Second Interim Report. It includes all financial information through January 31 of the current fiscal year as recorded on a cash basis. The report is to be reviewed and submitted to the board for approval and submitted to the school authorizer by March 15.

Unaudited Actuals

1. The Unaudited Actuals are to be submitted to the Chief Operating Officer by the Financial Manager for review by 10 days prior to the August board meeting. GVA uses the Charter School Unaudited Actuals Alternative Form which includes all financial information on a full accrual basis for the prior fiscal year.
2. The report is to be reviewed and submitted to the board for approval and submitted to the authorizer by September 15. The report will include the Alternative Form, signed Certification page by the Chief Executive Officer, and financial statements for restricted funds, unrestricted funds, and totals.

Budget Reports

1. Annual budgets are to be submitted to the board for approval at the June board meeting of the year prior to the fiscal budget year. The Budget packet is to be submitted to the authorizer by July 1.
2. The packet should include Charter School Alternative Budget Form, signed Certification page, Cash Flow, Multi Year Projection Budget and narrative, and the relative Local Control Funding Formula calculator.

Real Estate Loans

1. The Chief Executive Officer may make recommendations to the School Board concerning the need to enter into a long-term real estate loan with a financial institution.
2. The Chief Executive Officer shall review the promissory note before the funds are borrowed.
3. Loan agreements should specify all applicable terms, including purpose of the loan, the interest rate, term of the loan and required collateral, if necessary.
4. Loan covenants and reporting requirements are to be acknowledged by the School Board at the time of adoption.
5. The School Board will approve all real estate loans from third party institutions.

Intercompany Loans

1. It may be necessary and prudent to loan money between school entities in order reduce costs, save on interest expense, start another school, etc.
2. The Chief Executive Officer will make a request of the School Board for intercompany loan approval.
3. Upon School Board approval, the intercompany loan amount is noted from the reserve on the cash flow statement and balance sheet and notated by the auditors.
4. No specific repayment terms are required for intercompany loans, it is noted that repayment should occur as quickly as fiscally prudent.

Employee Loans

1. At no time are employee loans, including salary advances, allowed by Great Valley Academy.
2. 401k loans are allowed and managed by GVA's third-party 401k administrator, not Great Valley Academy.

Financial Institutions

1. Great Valley Academy will maintain banking relationships with multiple high quality financial institutions with the following objectives in order of priority: preservation and safety of principal, liquidity, and yield.
2. Each school entity may bank with different financial institutions.
3. GVA will use a separate financial institution for payroll banking needs.
4. The Chief Operating Officer will manage the banking relationships and will receive Chief Executive Officer approval before opening or closing a bank or investment account.
5. The School Board will adopt an investment policy before funds are to be invested.

Record Retention

1. Refer to Addendum B – Record Retention Policy. This policy is School Board approved.

ASSET MANAGEMENT

Asset Inventory

1. GVA capitalizes any item, purchased or donated, with a value of \$5,000 or more and with a useful life of more than one year.
2. Finance Manager will maintain a ledger of all capitalized items. The ledger will include the original purchase price and date and a brief description of the asset.
3. GVA will take a physical inventory of all assets within 90 days of the end of each fiscal year, indicating the condition and location of the asset.
4. The Chief Operating Officer will be notified of all cases of theft, loss, damage or destruction of assets.
5. The Chief Operating Officer will submit to Chief Executive Officer written notification of plans for disposing of assets with a clear and complete description of the asset and the date of the disposal. The Financial Manager should be copied for updating the ledger and financials.
6. The Information Technology Technician will maintain all records of current and destroyed Information Technology assets.

INSURANCE

Insurance

1. The proper insurance levels and terms of insurance policies should be determined based on the value of the assets at risk and the requirement of the charter authorizer. At a minimum, general liability insurance coverage should be no less than:
 - a. General Liability - \$2,000,000 (annual) and \$1,000,000 (per occurrence) minimums
 - b. Property and Auto
 - c. Workers' Compensation
 - d. Professional Liability
 - e. Directors' and Officers' Coverage
2. The Chief Operating Officer will review insurance policies with the Broker on an annual basis prior to renewal to determine compliance with Charter authorizer(s) and any applicable loan covenant requirements.

RESERVES

Fund Balance Reserves

Financial reserves are needed to manage cash flow and to help protect from unforeseen revenue shortfalls, unexpected costs, and economic uncertainties. As California has demonstrated a history of deferring state revenue to the extent of 40%, financial reserves are necessary to stay solvent and reduce the cost of borrowing money until payments are received. Available reserves for any of the budget year or two subsequent fiscal years are to be maintained at not less than 3% of total expenditures.

1. Ending projected reserves will be analyzed by the Chief Operating Officer periodically to confirm they are meeting the minimum 3%. If at any time, projections reflect a lower Reserve Balance, budget adjustments will be made to reduce spending to increase the balance to meet the minimum.
2. Chief Operating Officer will monitor the organization's reserve level and will report the reserve level to the Chief Executive Officer.
3. The Chief Executive Officer may prioritize payments as necessary to manage cash flow.
4. The Chief Executive Officer may restrict a portion of the operating reserve fund for strategic goals.
5. The School Board may develop an additional Operating Reserve Policy to specify use of the operating reserves.

Cash Balance Reserves

Great Valley Academy requires a cash reserve of no less than 12.5% of one school year's operating expenses with the desire for the organization to have cash on hand of no less than 25% of one school year's operating expenses.

Line of Credit

Great Valley Academy maintains a \$1,000,000 line of credit with a high quality financial institution for emergency purposes.

1. The Chief Executive Officer may seek the approval of the School Board to draw upon the line of credit.

PERSONNEL

Segregation of Duties

Key Employees by Title

- A. Chief Executive Officer
- B. Chief Operating Officer
- C. Founder
- D. Department Manager/Principal
- E. Payroll Authorizer by Department
- F. Payroll Technician
- G. Finance Manager

Personnel & Payroll Functions	A	B	C	D	E	F	G	Comments
Hires new employees	X	X		X				
Maintains personnel files						X		
Authorizes salary and salary changes	X	X		X				
Enters employees in to payroll system						X		
Enters rates changes in the payroll sys.						X		
Verifies time clock records					X	X		
Processes payroll in payroll system		X				X		
Prepares payroll checks							X	
Prepares payroll journal entries							X	
Signs payroll checks	X	X	X					
Distributes payroll checks						X		
Prepares payroll liabilities						X		
Generates payroll liability checks							X	
Approves payroll liabilities		X						
Signs payroll liabilities (check & electronic payments)	X	X	X					

1. The Payroll & Human Resources Technician will be responsible for all new employees completing or providing all of the items for the New Hire Packet.
2. The Payroll & Human Resources Technician will be responsible for maintaining this information in the payroll management system and in locked personnel files.
3. An employee's hiring is not effective until the employment application, form W-4, form I-9, Live Scan Clearance, Tuberculosis Clearance, and credential verification (certificated staff) forms have been completed.

PAYROLL

Payroll Management System

GVA uses a third-party payroll management company to manage all time and attendance tracking and payroll check generation. All Fair Labor Standards Act (FLSA) and Department of Labor (DOL) are the responsibility of Great Valley Academy but the assistance of a third-party payroll management company greatly reduces risk and improves efficiency in processing payroll and managing record-keeping.

Timesheets

1. Hourly, substitute and on-call employees record all clock-in and clock-out times (including time off) in the payroll management system.
2. Salary employee's record all requested and approved time off in the payroll management system.
3. At the conclusion of each pay period, employees are responsible for verifying and accepting their time records in the payroll management system.
4. Once an employee has accepted their time, either a Manager 1 and/or Manager 2 must verify and accept their time record in the payroll management system.
5. Once the Manager 1 and/or Manager 2 have verified their employee's time record, Payroll Technician reviews the time record of each employee.

Time Off

1. Common time off includes:
 - Paid Time Off
 - Calendar Reduction Time
 - School Business
 - Unpaid Time
 - Jury Duty
 - Family or Medical Leave
 - Sick Time (substitute or on-call employees)
 - Bereavement
2. All employees requesting time off must complete a request under their account in the payroll management system.
3. The employee's supervisor must approve or deny the request within the payroll management system.

Overtime

1. Advanced approval in writing by the authorized supervisor is required for overtime.
2. Overtime only applies to classified non-exempt employees and is defined as hours worked in excess of eight (8) hours in one day or forty (40) hours within a seven-day work week. Any hours worked in excess of an employee's regular work schedule must be pre-approved by the supervisor. Worked overtime must be approved by the employee's supervisor.
3. Overtime will not be granted on a routine basis and is only reserved for extraordinary or unforeseen circumstances. If a supervisor identifies a recurring need for overtime in any given position, the supervisor should immediately consult with the Chief Operating Officer for further guidance.

Payroll Processing

1. For hourly and substitute employees, employees must use the time clock system to record all hours worked on a semi-monthly basis.
2. For salaried employees, employees are assumed to work their respective hours unless a time-off request has been requested in the payroll management system. Salaried employees are paid on a monthly basis.
3. A list of all stipend recipients must be provided to the Chief Operating Officer by September 1st of each school year to allow for ample time to verify and process stipends in accordance with employee schedules.
4. The Payroll Technician is responsible for processing all payroll related documentation in the payroll management system and is verified by the Chief Operating Officer.
5. Direct deposited checks will be available the 10th and 26th of each month. Live payroll checks (if applicable) will be delivered to school employees on the 10th and 26th of each month.
6. See (Addendum E) for Annual Payroll Calendar

Payroll Taxes and Filings

1. The payroll management company prepares the state and federal quarterly and annual payroll tax forms and submits with payment to the respective tax and liability agencies.
2. The payroll management company prepares all employee annual W2 and Affordable Care Act (ACA) compliance forms.

Employee Handbook

1. Great Valley Academy maintains an annual Employee Handbook that can be referenced for additional details regarding employee payroll related topics including vacation, sick pay, time off detail, protected leave, worker's compensation and more.

INTERNET SOURCES

Revenues from California Department of Education (CDE):

1. All CDE funding can be found at the Allocations & Apportionments page. Select the specific program needed, or see the links below.
<https://www.cde.ca.gov/fg/aa/>
 - a. Principal Apportionments: P1, P2, Annual, go to page then select the fiscal year needed. To see the prior year annual, select the current year P2 and choose from the drop down menu.
<https://www.cde.ca.gov/fg/aa/pa/index.asp>
 - b. Lottery:
<https://www.cde.ca.gov/fg/aa/lo/>
 - c. Categorical Programs: here you will find new and recurring programs, ie Educator Effectiveness; Mandate Block Grant; One Time Funds; Prop 39; etc.
<https://www.cde.ca.gov/fg/aa/ca/>
 - d. Unaudited Actuals : scroll down and click the link to "Charter School Unaudited Actuals Financial Report-Alternative Form"
<https://www.cde.ca.gov/fg/sf/fr/>
2. Local Control Funding Formula (LCFF) Calculator from the Fiscal Crisis & Management Assistance Team (FCMAT):
<http://fcmat.org/local-control-funding-formula-resources/>
3. Special Education Local Plan Area (SELPA) Files from Stanislaus County Office of Education (SCOE):
Choose SELPA; Fiscal Services; LEAs; All Districts; then Fiscal Year; then SELPA Budget Development Forms.
Download electronic forms of each item to create SELPA budget.
<https://eco.stancoe.org/laserfiche/Browse.aspx?repo=SCOE#?id=1>
4. Audit Firm Document Management System
<https://app.suralink.com/index.php>
5. Payroll Management System
Paychex - https://myapps.paychex.com/landing_remote/html
Paychex Training Modules - <https://training.paychex.com/paychexflex/er/dashboard/index.html>
6. GVA Staff Intranet
<https://www.greatvalleyacademy.com/protected/home-intranet/Intranet-Homepage.html>
7. SchoolCare Works – Kids' Care Billing System
https://www.schoolcareworks.com/cg/secure_login.jsp

Addendum A

RESOLUTION NO.: 2018.041

CASH INVESTMENT POLICY

WHEREAS, it is in the best interest of Great Valley Academy to obtain the maximum rate of return on cash balances be it:

RESOLVED, that the School Board of Great Valley Academy authorizes the Chief Executive Officer or designee to pursue approaches to the management of the organization's short-term investments. The board cash investment policy shall be to establish a portfolio of short term instruments that allow cash assets to be invested in a high quality portfolio which (in order of priority):

1. preserves principal
2. meets the organization's liquidity needs
3. delivers good yields in relationship to these guidelines and market conditions
4. avoids inappropriate investments or inappropriate risks, or concentrations on investments.

BE IT FURTHER RESOLVED, that safety shall always be a primary consideration in structuring the investment portfolio. Great Valley Academy is adverse to incurring market risk or credit risk, and will generally sacrifice yield in the interest of safety. Federal Deposit Insurance Corporation (FDIC) or National Credit Union Administration (NCUA) insurance should be tied to duration in order to combine safety, liquidity and acceptable market performance.

BE IT FURTHER RESOLVED, that the security types approved for the organization's investment (eligible investments) of this policy shall include:

- Certificate of Deposit (CD)
- Certificate of Deposit Account Registry Service (CDARS)

These investments will be made in U.S. dollars only to the maximum allowable FDIC limit per investment and shall have maturities no longer than five (5) years with average maturity of the portfolio maintained at twenty-four (24) months or less.

Addendum B

RESOLUTION NO.: 2016.019

RECORD RETENTION POLICY

Great Valley Academy (GVA) takes seriously its obligations to preserve information relating to litigation, audits, and investigations.

The information listed in the retention schedule below is intended as a guideline and may not contain all the records GVA may be required to keep in the future. Questions regarding the retention of documents not listed in this chart should be directed to the CEO.

From time to time, the CEO may issue a notice, known as a “legal hold”, suspending the destruction of records due to pending, threatened, or otherwise reasonably foreseeable litigation, audits, government investigations, or similar proceedings. No records specified in any legal hold may be destroyed, even if the scheduled destruction date has passed, until the legal hold is withdrawn in writing by the CEO.

File Category	Item	Retention Period
Corporate Records	Bylaws and Articles of Incorporation	Permanent
	Corporate resolutions	Permanent
	Board and committee meeting agendas and minutes	Permanent
	Conflict-of-interest disclosure forms	4 years
Finance and Administration	Financial statements (audited)	7 years
	Auditor management letters	7 years
	Payroll records	7 years
	Check register and checks	7 years
	Bank deposits and statements	7 years
	Chart of accounts	7 years
	General ledgers and journals (includes bank reconciliations)	7 years
	Investment performance reports	7 years
	Equipment files and maintenance records	7 years after disposition
	Contracts and agreements	7 years after all obligations end
	Correspondence — general	3 years

File Category	Item	Retention Period
Insurance Records	Policies — occurrence type	Permanent
	Policies — claims-made type	Permanent
	Accident reports	7 years
	Safety (OSHA) reports	7 years
	Claims (after settlement)	7 years
	Group disability records	7 years after end of benefits
Real Estate	Deeds	Permanent
	Leases (expired)	7 years after all obligations end
	Mortgages, security agreements	7 years after all obligations end
Tax	IRS exemption determination and related correspondence	Permanent
	IRS Form 990s	7 years
	Charitable Organizations Registration Statements (filed with Minnesota Attorney General)	7 years
Human Resources	Employee personnel files	Permanent
	Retirement plan benefits (plan descriptions, plan documents)	Permanent
	Employee handbooks	Permanent
	Workers comp claims (after settlement)	7 years
	Employee orientation and training materials	7 years after use ends
	Employment applications	3 years
	IRS Form I-9 (store separate from personnel file)	Greater of 1 year after end of service, or three years
	Withholding tax statements	7 years
	Timecards	3 years
Technology	Software licenses and support agreements	7 years after all obligations end

Electronic Documents and Records

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an e-mail message, the message should be printed in hard copy and kept in the appropriate file or moved to an “archive” computer file folder. Backup and recovery methods will be tested on a regular basis.

Emergency Planning

The Organization’s records will be stored in a safe, secure, and accessible manner. Documents and financial files that are essential to keeping the Organization operating in an emergency will be duplicated or backed up at least every week and maintained off-site.

Document Destruction

The President is responsible for the ongoing process of identifying its records, which have met the required retention period, and overseeing their destruction. Destruction of financial and personnel related documents will be accomplished by shredding.

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

Compliance

Failure on the part of employees to follow this policy can result in possible civil and criminal sanctions against the Organization and its employees and possible disciplinary action against responsible individuals. The President and Board Chair will periodically review these procedures with legal counsel or the organization’s certified public accountant to ensure that they are in compliance with new or revised regulations.

Addendum C



Cash Reimbursement Form

Name: _____

Campus: _____

Expense Reimbursement amount \$ _____

Description of item(s) purchased _____

Teacher ¹	Department ²	Funds ³	Amount

Total \$ _____

Signature

Date

Please attach all original receipts to this request. All reimbursements/disbursements require at least 2 weeks' notice.

¹ The teacher must sign below to authorize the release of classroom funds.

² Classroom, Program, Other (Specify)

³ Classroom Business, Teacher Allowance, Uniform Allowance, Other (Specify)



Addendum D

Travel Reimbursement Form

Name: _____

Campus: _____

Title of Conference: _____ Purpose: _____

Location: _____ Conference Dates: _____

Expenses - Please fill out all information on conference registration form. Attach original receipts that detail the purchase (credit card slips do not qualify).								Actual Cost
Registration:								
Contract Transportation (Airline, Train, Bus)								
Lodging:								
Car Rental:								
Parking, Taxi, Bus, or Shuttle Service:								
Other (Instructional Materials, Resource Books)								
Bridge Tolls:								
Mileage								
Meals:								
	Date Sunday _____	Date Monday _____	Date Tues _____	Date Wed _____	Date Thurs _____	Date Friday _____	Date Sat _____	
Breakfast								
Lunch								
Dinner								
Meal Limits: Breakfast: \$7.00 Lunch: \$11.00 Dinner: \$23.00								
								Total Cost \$

Supervisors' Authorization

Date

Rules for Travel Expenses

Trips of 24 Hours or More

For travel lasting 24 hours or more, employees may claim meals based on the following time frames:

First day of travel

- Trip begins at or before 6 am - Breakfast may be claimed
- Trip begins at or before 11 am - Lunch may be claimed
- Trip begins at or before 5 pm - Dinner may be claimed

Continuing after 24 hours

- Trip ends at or after 8 am - Breakfast may be claimed
- Trip ends at or after 2 pm - Lunch may be claimed
- Trip ends at or after 7 pm - Dinner may be claimed

Trips of Less than 24 Hours

For travel lasting less than 24 hours, employees may claim breakfast and/or dinner (as noted above), based on the following time frames:

Fractional day of travel

- Trip begins at or before 6 am and ends at or after 9 am - Breakfast may be claimed
- Trip begins at or before 4 pm and ends at or after 7 pm - Dinner may be claimed

Employees may ***not*** claim meals provided by the state, meals included in hotel expenses or conference fees, meals included in transportation costs such as airline tickets, or meals that are otherwise provided. Snacks and continental breakfasts such as rolls, juice, and coffee are not considered to be meals.

Addendum E

2018 – 2019 Payroll Processing Calendar

July							August							September							October						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7				1	2	3	4							1		1	2	3	4	5	6
8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13
26	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20
22	23	24	25	26	27	28	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27
29	30	31					26	27	28	29	30	31		23	24	25	26	27	28	29	28	29	30	31			
														30													
November							December							January							February						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5					1	2	
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28		
							30	31																			
March							April							May							June						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2			1	2	3	4	5	6			1	2	3	4							1	
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31		23	24	25	26	27	28	29
31																					30						

Campus Processing Day/Status Change Documents Due	Hourly Pay Day	Hourly/Salary Pay Day
District Payroll Submission Day	All Liabilities Paid and Reported	Reasonable Assurance Letters 4/17
Trimester/YE Stipends Due	End of Year Resignations to District 5/23	
School Holidays	New School Year Modifications to District* 6/21	
/ indicates office closed		*Includes all status change forms (pay rates), teacher agreements, performance appraisals, etc.

Payroll Check Date	Pay Period Hourly & Substitutes	Pay Period Salary
July 10, 2018	June 16, 2018 - June 30, 2018	N/A
July 26, 2018	July 1, 2018 - July 15, 2018	July 1, 2018 - July 31, 2018
August 10, 2018	July 16, 2018 - July 31, 2018	N/A
August 24, 2018	August 1, 2018 - August 15, 2018	August 1, 2018 - August 31, 2018
September 10, 2018	August 15, 2018 - August 31, 2018	N/A
September 26, 2018	September 1, 2018 - September 15, 2018	September 1, 2018 - September 30, 2018
October 10, 2018	September 16, 2018 - September 30, 2018	N/A
October 26, 2018	October 1, 2018 - October 15, 2018	October 1, 2018 - October 31, 2018
November 9, 2018	October 16, 2018 - October 31, 2018	N/A
November 26, 2018	November 1, 2018 - November 15, 2018	November 1, 2018 - November 30, 2018
December 10, 2018	November 16, 2018 - November 30, 2018	N/A
December 26, 2018	December 1, 2018 - December 15, 2018	December 1, 2018 - December 31, 2018
January 10, 2019	December 16, 2018 - December 31, 2018	N/A
January 25, 2019	January 1, 2019 - January 15, 2019	January 1, 2019 - January 31, 2019
February 8, 2019	January 16, 2019 - January 31, 2019	N/A
February 26, 2019	February 1, 2019 - February 15, 2019	February 1, 2019 - February 28, 2019
March 8, 2019	February 16, 2019 - February 28, 2019	N/A
March 26, 2019	March 1, 2019 - March 15, 2019	March 1, 2019 - March 31, 2019
April 10, 2019	March 16, 2019 - March 31, 2019	N/A
April 26, 2019	April 1, 2019 - April 15, 2019	April 1, 2019 - April 30, 2019
May 10, 2019	April 16, 2019 - April 30, 2019	N/A
May 24, 2019	May 1, 2019 - May 15, 2019	May 1, 2019 - May 31, 2019
June 10, 2019	May 16, 2019 - May 31, 2019	N/A
June 26, 2019	June 1, 2019 - June 15, 2019	June 1, 2019 - June 30, 2019

Net Deferred Pay (Summer Holdback) will be paid on July 26, 2019.

Addendum F

BOARD POLICY NO.: 2019.050

Payment Card Industry Data Security Standard (PCI DSS) Compliance Policy

Overview

PCI DSS is the payment card industry data security standard and is a worldwide security standard assembled by the Payment Card Industry Security Standards Council (PCI SSC).

The PCI SSC is responsible for managing the security standards, while compliance with the PCI set of standards is enforced by the founding members of the Council: American Express, Discover Financial Services, MasterCard Worldwide and Visa Inc.

PCI DSS includes technical and operational requirements for security management, policies, procedures, network architecture, software design and other critical protective measures to prevent credit card fraud, hacking and various other security vulnerabilities and threats. The standards apply to all organizations that store, process or transmit cardholder data.

The standards are designed to protect cardholder information of patrons that utilize a credit card to transact business with Great Valley Academy. This policy is intended to be used in conjunction with the complete PCI DSS requirements as established and revised by the PCI Security Standards Council.

Credit card companies and financial institutions validate and rate companies based on their volume of transactions. The rating that a company receives determines the process that they must go through in order to be validated. There are four levels of PCI Compliance, with level 1 being the most stringent and level 4 being the least stringent. Based on the number of credit card transactions processed annually across Great Valley Academy locations (less than 20K per year), Great Valley Academy would be classified as a level 4.

All merchants and service providers are required to comply with the PCI DSS as applicable to their environments at all times. There are a number of SAQ types and Great Valley Academy is SAQ-C.

Responsibilities

All credit card transactions should be completed by only approved Great Valley Academy employees. Approved employees may only be granted by the Chief Executive Officer or Chief Operating Officer. All approved employees must comply with the PCI DSS policy.

Definitions

Merchant Account – A relationship between Great Valley Academy and a financial institution in order to accept credit card transactions. The merchant account is associated to a general ledger account to record funds appropriately.

Credit Card Data – Full magnetic strip or the PAN (Primary Account Number) plus any of the following:

- Cardholder name
- Expiration date
- Service Code

PCI DSS – Payment Card Industry Data Security Standard

PCI SSC – The security standards council defines credentials and qualifications for assessors and vendors as well as maintaining the PCI DSS.

Self-Assessment – The PCI Self-Assessment Questionnaire (SAQ) is a validation tool that is primarily used by merchants to demonstrate compliance to the PCI DSS.

PAN – Primary Account Number is the payment card number (credit or debit) that identifies the issuer and the particular cardholder account. It is also called Account Number.

Policy

Great Valley Academy prohibits the storing of any credit card information in an electronic format on any computer, server or database including Excel spreadsheets. It further prohibits the emailing of credit card information. Great Valley Academy utilizes third-party web-based vendors and a point of sale system for credit card processing.

Great Valley Academy Policy Requirements:

- Maintain a Secure Network
- Maintain Strong Access Control Measures
- Protect Cardholder Data
- Regularly Monitor and Test Networks
- Ensure Third Party Compliance
- Complete an Annual PCI Self-assessment for Maintenance of SAQ by Environment
- Provide Continuous Staff Training

Recommendations:

- Perform a Quarterly Network Scan

Without adherence to the PCI DSS standards, Great Valley Academy would be in a position of unnecessary reputational risk and financial liability. Merchant account holders who fail to comply are subject to:

- Any fines imposed by the payment card industry
- Any additional monetary costs associated with remediation, assessment, forensic analysis or legal fees
- Suspension of the merchant account

Procedures

To achieve compliance, the following requirements must be met by departments accepting credit cards to process payments on behalf of Great Valley Academy.

General Requirements

- Credit card merchant accounts must be approved by the Chief Executive Officer or Chief Operating Officer.
- Approved employees must be familiar with and adhere to the PCI DSS requirements of the PCI Security Standards Council.
- The Chief Operating Officer must conduct an annual self-assessment against the requirements and report results to the Chief Executive Officer. All approved employees involved in processing credit card payments must sign a statement that they have read, understood, and agree to adhere to this policy.
- Any proposal for a new process (electronic or paper) related to the storage, transmission or processing of credit card data must be brought to the attention of and be approved by the Chief Executive Officer or Chief Operating Officer.

Storage and Disposal

- Credit card information must NOT be entered/stored on Great Valley Academy network servers, workstations, or laptops.
- Credit card information must NOT be transmitted via email.

- Web payments must be processed using a PCI-compliant service provider approved by the Chief Executive Officer or Chief Operating Officer. Credit card numbers must NOT be entered into a web page of a server hosted on the Great Valley Academy network.
- Electronic storage of credit card data is prohibited by this policy.
- Any paper documents containing credit card information should be limited to only information required to transact business, only those approved employees who have a business need to have access, should be in a secure location, and must be destroyed via approved methods once business needs no longer require retention.
- All credit card processing machines must be programmed to printout only the last four characters of a credit card number.
- Securely dispose of sensitive cardholder data when no longer needed for reconciliation, business or legal purposes. In no instance shall this exceed three years. Secured destruction must be via shredding either in house or with a third-party provider with certificate of disposal.
- Neither the full contents of any track for the magnetic strip nor the three-digit card validation code may be stored in a database, log file, or point of sale product.

Third Party Vendors (Processors, Software Providers, Payment Gateways, or Other Service Providers)

- Great Valley Academy's Chief Executive or Chief Operating Officer must approve each merchant bank or processing contact of any third-party vendor that Great Valley Academy desires to engage in the processing or storage of transaction data on behalf of Great Valley Academy—regardless of the manner or duration of such activities.
- Ensure that all third-party vendors adhere to all rules and regulations governing cardholder information security.
- Contractually require that all third parties involved in credit card transactions meet all PCI security standards, and that they provide proof of compliance and efforts at maintaining ongoing compliance.

Self-Assessment

- The Chief Operating Officer will complete and submit each annual assessment.
- The PCI DSS Self-Assessment Questionnaire must be completed by the merchant account owner annually and anytime a credit card related system or process changes. This assessment is the responsibility of the Chief Operating Officer.

Training

Ongoing training programs must be offered to train approved employees on PCI DSS and importance of compliance.

Enforcement

The Chief Operating Officer will oversee enforcement of the policy. Additionally, this individual will investigate any reported violations of this policy, lead investigations about credit card security breaches and may terminate access to protected information of any users who fail to comply with the policy.

Additional Resources

- PCI Compliance Guide <http://www.pcicomplianceguide.org/>
- PCI DSS Resources https://www.pcisecuritystandards.org/security_standards/pci_dss.shtml

Great Valley Academy Modesto 2022-2023 Academic Calendar

1-8 Staff In-Service- No School

9 1st Day of School

22-31 NWEA Testing

AUGUST 2022						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

17 days

FEBRUARY 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

18 days

End of Trimester = Feb. 24

1-3 NWEA Testing

13 Staff In-Service- No School

20 Presidents' Day- No School

1-15 NWEA Testing

5 Labor Day- No School

16 Staff In-Service- No School

SEPTEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

20 days

MARCH 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

18 days

15 Character Report Cards

15 Academic Report Cards

15-17 Parent Teacher Conferences

20-24 Spring Break- No School

5 Character Report Cards

5-7 Parent/Teacher Conferences

10-14 Fall Break- No School

OCTOBER 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

16 days

APRIL 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

18 days

14-17 Spring Holiday- No School

11-28 SBAC Testing

11 Veterans Day- No School

16 Academic Report Cards

23-25 Thanksgiving Break- No School

NOVEMBER 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

18 days

End of Trimester = Nov. 4

MAY 2023						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

21 days

5 Staff In-Service- No School

2-5 Smarter Balanced

29 Memorial Day- No School

31 Academic Report Cards

31 Character Report Cards

19-30 Winter Break- No School

DECEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

12 days

JUNE 2023						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

2 days

End of Trimester = June 2

2 Last Day of School

5 Staff In-Service Day

2 Winter Break- No School

10-31 NWEA Winter Testing

16 M.L King Day- No School

JANUARY 2023						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

JULY 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Teacher In-Service Days
180 School Days

Great Valley Academy Salida 2022-2023 Academic Calendar

1-8 Staff In-Service- No School

9 1st Day of School

AUGUST 2022						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

17 days

FEBRUARY 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

18 days

End of Trimester = Feb. 24

8-10 Parent/Teacher Conferences

13 Staff In-Service- No School

20 Presidents' Day- No School

5 Labor Day- No School

16 Staff In-Service- No School

SEPTEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

20 days

MARCH 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

18 days

20-24 Spring Break- No School

5-7 Parent/Teacher Conferences

10-14 Fall Break – No School

OCTOBER 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

16 days

APRIL 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

18 days

14-17 Spring Holiday- No School

11 Veterans Day- No School

23-25 Thanksgiving Break- No School

NOVEMBER 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

18 days

End of Trimester = Nov. 4

MAY 2023						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

21 days

5 Staff In-Service- No School

29 Memorial Day- No School

19-30 Winter Break- No School

DECEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

12 days

JUNE 2023						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

2 days

End of Trimester = June 2

2 Last Day of School

5 Staff In-Service Day

2 Winter Break- No School

16 M.L King Day- No School

JANUARY 2023						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

JULY 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Staff In-Service Days

180 School Days



Holiday Schedule Classified Staff 2022-2023 School Year

Monday, July 4, 2022	Independence Day
Monday, September 5, 2022	Labor Day
Friday, November 11, 2022	Veteran's Day
Thursday & Friday, November 24 & 25, 2022	Thanksgiving Holidays
Friday & Monday, December 23 & 26, 2022	Winter Holidays
Friday, December 30, 2022 & Monday, January 2, 2023	New Year's Holidays
Monday, January 16, 2023	Martin Luther King Jr. Day
Monday, February 20, 2023	President's Day
Friday & Monday, April 14 & 17, 2023	Spring Holidays
Monday, May 29, 2023	Memorial Day

Great Valley Academy Charter School
Classified Staff Salary Guide
Effective 2022-2023



Classified Hourly Position	Hourly Range	
Instructional Aides/Kids' Care Aides	\$16.00	\$21.50
Clerical/Office Assistant/Parent Liaison	\$16.00	\$21.50
Attendance Clerk	\$16.00	\$25.00
GVS Aides	\$16.00	\$21.50
GVS Supervisor	\$18.00	\$30.00
Food Services Technician	\$16.00	\$21.50
Food Services Aide	\$16.00	\$19.00
Health Clerk	\$16.00	\$21.50
Health Technician (LVN)	\$21.00	\$26.00
IT Technician	\$17.00	\$24.00
Maintenance Technician	\$17.00	\$25.00
Administrative Assistant	\$20.00	\$30.00
Office Manager I	\$20.00	\$30.00
Accounting Technician	\$17.00	\$23.00
Business Office Technician	\$17.00	\$23.00
Kids' Care Director	\$18.00	\$25.00
Speech-Language Pathologist Assistant	\$30.00	\$38.00

Classified Salary Position	Salary Range	
Maintenance Manager	\$62,400	\$69,720
Speech Language Pathologist	\$62,400	\$79,200
Classified Teacher (11 Month)	\$57,200	\$72,000

Classified Confidential Administrative Position*	Salary Range	
Payroll/HR Manager	\$23.00	\$33.00
IT Manager	\$23.00	\$33.00
Program Manager, Multi-Campus Operations	\$62,400	\$70,100
Executive Assistant	\$62,400	\$68,000
Accounting Manager	\$62,400	\$84,000

*The confidential administrative positions will be placed on the salary schedule per its determination on an individual, case by case basis, based upon factors including but not limited to: years or experience in various business, industry, education, life experience, etc.

Changes in salary are contingent upon budget availability.

Board Approved: Pending



Certificated Salary Scale
2022-23 Initial Placement Scale

	BASE		A		B		C		D		E		F
Year	BA/NC		BA+12		BA+24		BA+36		BA+48		BA+60		BA+72
1	\$57,200		\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719
2	\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719		\$61,326
3	\$58,350		\$58,933		\$59,523		\$60,118		\$60,719		\$61,326		\$61,939
4	\$58,933		\$59,523		\$60,118		\$60,719		\$61,326		\$61,939		\$62,559
5	\$59,523		\$60,118		\$60,719		\$61,326		\$61,939		\$62,559		\$63,184
6	\$59,523		\$60,719		\$61,326		\$61,939		\$62,559		\$63,184		\$63,816
7	\$59,523		\$61,326		\$61,939		\$62,559		\$63,184		\$63,816		\$64,454
8	\$59,523		\$61,939		\$62,559		\$63,184		\$63,816		\$64,454		\$65,099
9	\$59,523		\$62,559		\$63,184		\$63,816		\$64,454		\$65,099		\$65,750
10	\$59,523		\$63,184		\$63,816		\$64,454		\$65,099		\$65,750		\$66,407
11	\$59,523		\$63,184		\$64,454		\$65,099		\$65,750		\$66,407		\$67,071
12	\$59,523		\$63,184		\$64,454		\$65,750		\$66,407		\$67,071		\$67,742
13	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$67,742		\$68,420
14	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$69,104
15	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$69,795
16	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$70,493
17	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$71,198
18	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$71,910
19	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$72,629
20	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$73,355
25	\$59,523		\$63,184		\$64,454		\$65,750		\$67,071		\$68,420		\$74,089

Certificated employees new to GVA will received .5 credit for years of teaching for placement on scale.



**Certificated Salary Scale
2023-24 and Future Years**

	BASE		A		B		C		D		E		F
Year	BA/NC		BA+12		BA+24		BA+36		BA+48		BA+60		BA+72
1	\$57,200		\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719
2	\$58,400		\$58,972		\$59,550		\$60,133		\$60,723		\$61,318		\$61,919
3	\$59,600		\$60,172		\$60,750		\$61,333		\$61,923		\$62,518		\$63,119
4	\$60,800		\$61,372		\$61,950		\$62,533		\$63,123		\$63,718		\$64,319
5	\$62,000		\$62,572		\$63,150		\$63,733		\$64,323		\$64,918		\$65,519
6	\$62,000		\$63,772		\$64,350		\$64,933		\$65,523		\$66,118		\$66,719
7	\$62,000		\$64,972		\$65,550		\$66,133		\$66,723		\$67,318		\$67,919
8	\$62,000		\$66,172		\$66,750		\$67,333		\$67,923		\$68,518		\$69,119
9	\$62,000		\$67,372		\$67,950		\$68,533		\$69,123		\$69,718		\$70,319
10	\$62,000		\$68,572		\$69,150		\$69,733		\$70,323		\$70,918		\$71,519
11	\$62,000		\$68,572		\$70,350		\$70,933		\$71,523		\$72,118		\$72,719
12	\$62,000		\$68,572		\$70,350		\$72,133		\$72,723		\$73,318		\$73,919
13	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$74,518		\$75,119
14	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$76,319
15	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$77,519
16	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$78,719
17	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$79,919
18	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$81,119
19	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$82,319
20	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$83,519
25	\$62,000		\$68,572		\$70,350		\$72,133		\$73,923		\$75,718		\$84,719

Certificated employees new to GVA will received .5 credit for years of teaching for placement on scale.

Great Valley Academy Charter School
Certificated Administrator Salary Guide
Effective 2022-2023



Certificated Administrator Salary Position	Salary Range	
Principal	\$80,000	\$135,000
Sr. Vice-Principal	\$85,000	\$110,000
Vice-Principal	\$65,000	\$84,500

Changes in salary are contingent upon budget availability.

Board Approved: Pending

Great Valley Academy
Board of Directors

March 1, 2022

Steve, Yolanda, Susan, Vince, Twila,

As a follow up to our February 28th, 2022 closed session and my verbal resignation, I submit to you my official letter of resignation. My last day as Great Valley Academy's Chief Executive Officer will be Friday, July 1, 2022.

I appreciate the opportunity to serve our GVA community for the past nine years, and appreciate your support during those years. I wish only the best for the future of Great Valley Academy.

Gratefully, <



Leah Silvestre Franklin, MBA
Chief Executive Officer



Great Valley Academy-Modesto

2022-2023 Comprehensive School Safety Plan

This Comprehensive School Safety Plan was developed collaboratively with key stakeholders and adopted by the Great Valley Academy Board of Education on March 29, 2022

***Great Valley Academy Board Approval
Confirmed by:***

Name	Title	Signature	Date
<i>Steve Payne</i>	<i>Board President</i>		
<i>Leah Silvestre Franklin</i>	<i>CEO</i>		

This document is to be maintained for public inspection in the School Office during regular business hours.

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Comprehensive Safety Plan Purpose & Compliance

The California Education Code (sections 32280-32288) outlines the requirements of all school districts operating any schools serving grades kindergarten through 12, inclusive, to write and develop a school safety plan relevant to the needs and resources of that particular school. Education Code does not require charter schools to have a safety plan. GVA has taken the opportunity to have a safety plan in order to have specific procedures in place in case of an emergency.

In 2004, the Legislature and Governor recast and renumbered the Comprehensive School Safety Plan provisions in SB 719 and AB 115. It is the intent of the Legislature in enacting the provisions to support California public schools as they develop their mandated comprehensive safety plans that are the result of a systematic planning process, that include strategies aimed at the prevention of, and education about, potential incidents involving crime and violence on school campuses.

The historical requirement of the Comprehensive School Safety Plan was presented in Senate Bill 187, which was approved by the Governor and chaptered in 1997. This legislation contained a sunset clause that stated that this legislation would remain in effect only until January 1, 2000. Senate Bill 334 was approved and chaptered in 1999 and perpetuated this legislation under the requirement of the initial legislation.

Comprehensive School Safety Plans must include the following elements:

- Assessment of school crime committed on school campuses and at school-related functions
- Child abuse reporting procedures
- Disaster procedures and procedures to allow a public agency to use school facilities for mass care and welfare shelters during an emergency
- Suspension and expulsion policies
- Procedures to notify teachers of dangerous pupils
- Discrimination, harassment, intimidation and bullying School-wide dress code policies
- Procedures for safe ingress and egress
- Policies enacted to maintain a safe and orderly environment
- Rules regarding access to school campus
- Rules and procedures on school discipline
- A crisis response plan
- Hate crime reporting procedures

The Comprehensive School Safety Plan will be reviewed and updated by March of each year. In July of every year, the school will report on the status of its school safety plan including a description of its key elements in the annual school accountability report card.

Small school districts (with an enrollment of 2,500 students or less) may develop a comprehensive district safety plan to encompass all schools within the district, which would fulfill each individual school's comprehensive safety plan requirement. It is not required that small school districts have their safety plans developed or approved by site councils or

designated safety committees; the plans must only be approved by the district board of trustees. However, a district plan should be developed in cooperation with local law enforcement agencies, community leaders, parents, pupils, teachers, administrators, and others who may be interested in the prevention of campus crime and violence.

GVA recognizes that students and staff have the right to a safe and secure campus where they are free from physical and psychological harm. The Board is fully committed to maximizing school safety and creating a positive learning environment that teaches strategies for violence prevention and emphasizes high expectations for student conduct, responsible behavior, and respect for others.

The Board shall review the comprehensive district wide and/or school safety plan(s) in order to ensure compliance with state law, Board policy and administrative regulation. Approval of the plan shall occur at a regularly scheduled meeting.

A copy of the comprehensive school safety plan shall be available for review at the Great Valley Academy, school administration offices and online at www.greatvalleyacademy.com

GVA Mission and Operating Principles

Vision

Great Valley Academy will meld neurological science and educational best practices to offer a superior learning alternative.

Mission

Learning adds quality to our lives. Each student will develop competence, caring and citizenship. We shall strive to inspire students to learn and to grow to their potential by:

1. Providing a quality education through a positive learning experience.
2. Working in partnership with the home and community to meet the individual needs of the student.
3. Developing the learning and social skills necessary for maximizing lifelong learning potential.

Philosophy

At Great Valley Academy, we believe:

- Every child is unique and can learn like a gifted learner – visually.
- Students deserve the opportunity to have instruction delivered in a way that is relevant and meaningful.
- School should be a non-threatening environment that emphasizes relationships.
- Character education should be taught, modeled and assessed.
- Highly trained, motivated teachers are essential.
- Parental involvement and support is an essential element of a quality educational experience.

GVA 5 Pillars

1. Great Valley Smart (GVS®)
2. Character Development
3. Climate: Safe/Loved/Learning
4. Mastery Learning
5. Highly Qualified and Dedicated Staff

Safety Plan Vision

To support the vision, mission and the five pillars of Great Valley Academy, we strive for a safe, respectful and nurturing learning environment where students are empowered to achieve through strong connections to their school and community.

Working together with our community partners, we will provide a safe campus environment by effectively identifying and addressing issues that potentially degrade our schools' social and physical climate.

Components of the Comprehensive School Safety Plan

GVA Safety Planning Team Members and Contributors

- Leah Silvestre Franklin, GVA CEO
- Mike Ruehle, Principal (August 2013-present)
- David Franklin, Vice Principal (August 2012-July 2014)
- Brianna de Visser, Vice Principal (August 2014-present)
- Chad Wolf, GVA Board
- Michelle Bond, GVA Kids Care Director
- Brent Gilbreath, GVA Maintenance
- Jennifer Farley, GVA teacher
- Lacey Cooper, GVA teacher
- Shelley Stewart, GVA parent and former MPD
- Russ Vorse, Premier Security
- K. Rausch, GVA student (graduated 2015)
- Bryan Jillson, GVA Head PE Teacher

Assessment of School Safety

An assessment of School Safety at GVA Modesto was conducted and included a review of survey data from the California Healthy Kids Survey (CHKS) and rates of disciplinary actions and truancy as collected through the California Department of Education Uniform Management Information Reporting System (UMIRS). Additional input was received from school administrators and law enforcement partners during the workshops conducted as part of the process to develop this safety plan. Reports from previously conducted physical site safety assessments were also reviewed.

Some of the key safety concerns raised during the assessment of school safety include:

- Signage
- Entrance and exits of the school
- Emergency procedures

Campus Safety Strategies and Programs

Education Code Section 32282(a)(2)(A)-(J)

GVA recognizes the importance of providing a safe school environment that is conducive to learning and helps ensure student safety and the prevention of student injury. The CEO or designee shall implement appropriate practices to minimize the risk of harm to students, including, but not limited to, practices relative to school facilities and equipment, the outdoor environment, educational programs, and school-sponsored activities.

(A) Child Abuse Reporting Procedures

Additional code references: Education Code Section 32282(a)(2)(A); Penal Code Section 11164 et seq.

GVA has a responsibility to protect students by facilitating prompt reporting of known and suspected incidents of child abuse and neglect. Specifically, California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance to **Child Protective Services (CPS)** immediately, or as soon as practically possible.

Child abuse should be reported immediately by phone, or as soon as practically possible, to the county **Child Protective Services** agency. The phone call is to be followed by a written report prepared by the employee within thirty-six (36) hours, which may be sent by fax or electronically. This procedure is outlined in more detail in the Reporting Procedures section, below.

Reporting the information regarding a case of possible child abuse or neglect to your supervisor, the School principal, coworker or other person shall not be a substitute for making a mandated report to **Child Protective Services**.

Definitions

1. “Child Abuse” or “neglect” includes the following:
 - a. A physical injury inflicted by other than accidental means on a child by another person.
 - b. Sexual abuse of a child.
 - c. Willful cruelty or unjustifiable punishment of a child, or willfully inflicting unjustifiable physical pain or mental suffering, or failure to safeguard a child from these injuries when the child is under a person's care or custody.
 - d. Unlawful corporal punishment or injury resulting in a traumatic condition.
 - e. Neglect of a child or abuse in out-of-home care.

Child abuse and/or neglect includes both acts and omissions on the part of the responsible person.

2. “Mandated Reporters” include, but are not limited to, teachers; instructional aides; teacher’s aides or assistants; designated classified employees; certificated pupil personnel employees; administrative officers or supervisors of child attendance; administrators and employees of a licensed day care facility; Head Start teachers; district police or security officers; and administrators, presenters, or counselors of a child abuse prevention program.
3. “Child Protective Agencies” are those law enforcement and child protective services responsible for investigating child abuse reports, including the local police or sheriff department, county welfare or juvenile probation department and child protective services.
4. “Reasonable Suspicion” means that it is objectively reasonable for a person to entertain such a suspicion, based upon facts that could cause a reasonable person in a like position, drawing when appropriate on his/her training and experience, to suspect child abuse.

5. “Child” means any person under 18 years of age.

Reporting Procedures

1. **Step #1: Telephone Report.** Immediately or as soon as practicably possible after knowing or observing suspected child abuse or neglect, a mandated reporter shall make an initial report by telephone to a child protective agency or law enforcement agency.
 - a. This report will include:
 1. The name of the person making the report.
 2. The name of the child.
 3. The present location of the child.
 4. The nature and extent of any injury.
 5. Any other information requested by the child protective agency, including the information that led the Mandated Reporter to gain knowledge of or suspect child abuse.
 - (i) When the verbal report is made, the employee shall note in writing the name of the official contacted, the date and time contacted, and any instructions or advice received.
 - b. If the agency asks the child be held until authorities arrive, the employee must remain with the child.
2. **Step #2: Written Report**
 - a. Within 36 hours of making the telephone report, the employee shall complete and mail to the local child protective agency (or law enforcement as appropriate) a written report, “Suspected Child Abuse Report,” which includes a completed Department of Justice form (DOJ SS 8572). The DOJ SS 8572 Form is available at http://ag.ca.gov/childabuse/pdf/ss_8572.pdf.
 - b. The written report is to be addressed to the person to whom the telephone report was made.
3. **Step #3: Internal Reporting**
 - a. Employees reporting child abuse or neglect to an appropriate agency are encouraged, but not required, to notify the Campus Principal, Vice Principal or designee as soon as possible after the initial telephone report to the appropriate agency. The Campus Principal, Vice Principal, or designee so notified shall provide the mandated reporter with any assistance necessary to ensure that reporting procedures are carried out in accordance with law, Board policy, and administrative regulation. At the mandated reporter's request, the Campus Principal, Vice Principal, or designee may assist in completing and filing the necessary forms. The mandated reporter shall not be required to disclose his/her identity to the Campus Principal or Vice Principal.

- b. He/she may provide or mail a copy of the written report to the Campus Principal, Vice Principal or designee without his/her signature or name. Reporting the information to an employer, supervisor, school principal, school counselor, co-worker, or other person shall not be a substitute for making a mandated report to the appropriate agency.

Legal Responsibility and Liability

1. Mandated Reporters have absolute immunity. School employees required to report are not civilly or criminally liable for filing a required or authorized report of known or suspected child abuse. This immunity shall apply even if the Mandated Reporter acquired the knowledge or reasonable suspicion of child abuse or neglect outside of his or her professional capacity or outside the scope of his or her employment.
2. If a Mandated Reporter fails to report an instance of child abuse which he/she knows to exist or reasonably should know to exist, he/she is guilty of a misdemeanor punishable by confinement in jail for up to six months, a fine of up to \$1,000, or both. The Mandated Reporter may also be held personally liable for damages resulting from any injury to the child after a failure to report and could incur costs of defense and any subsequent damages to the child.
3. All employees are subject to disciplinary action for failure to report suspected child abuse pursuant to this policy. Moreover, the Charter School is not obligated to defend an employee who neglects or fails to make a required report.
4. When two or more persons who are required to report have joint knowledge of a suspected instance of child abuse or neglect, and when there is agreement among them, the telephone report shall be made by a member of the team selected by mutual agreement and a single written report made and signed by the selected member of the reporting team. However, if any member of the reporting team knows or should know that the selected member failed to make the report, that member thereafter has a duty to do make the report.
5. The duty to report child abuse is an individual duty and no supervisor or administrator may impede or inhibit such reporting duties. Furthermore, no person making such a report shall be subject to any sanction.

Victim Interviews

Upon request, a child protective agency representative may interview a suspected victim of child abuse during school hours, on school premises, concerning a report of suspected child abuse or neglect that occurred within the child's home or out-of-home care. The child shall be given the choice of being interviewed in private or in the presence of any adult school employee or volunteer aide selected by the child.

A staff member or volunteer aide selected by a child may decline to be present at the interview. If the selected person accepts, the principal or designee shall inform him/her, before the interview takes place, of the following legal requirements:

1. The purpose of the selected person's presence at the interview is to lend support to the child and enable him/her to be as comfortable as possible.
2. The selected person shall not participate in the interview.
3. The selected person shall not discuss the facts or circumstances of the case with the child.
4. The selected person is subject to the confidentiality requirements of the Child Abuse and Reporting Act, a violation of which is punishable as specified in Penal Code 11167.5.

If a staff member agrees to be present, the interview shall be held at a time during school hours when it does not involve an expense to the school

Release of Child to Peace Officer or Child Protective Services Agent

When a child is released to a peace officer or child protective services agent and taken into custody as a victim of suspected child abuse, the Campus Principal, Vice Principal or designee shall not notify the parent/guardian as required in other instances of removal of a child from school, but rather shall provide the peace officer or agent with the address and telephone number of the child's parent/guardian. It is the responsibility of the peace officer or agent to notify the parent/guardian of the situation.

Peace officers and child protective services agents will be asked to sign an appropriate release or acceptance of responsibility form before removing a child from school grounds.

When School Employees are Accused of Child Abuse

Regardless of the identity of the suspected child abuser, the major responsibilities of Mandated Reporters are to: 1) identify incidents of suspected child abuse, and 2) comply with laws requiring the reporting of suspected abuse to the proper authorities. Determining whether or not the suspected abuse actually occurred is not the responsibility of the school employee. Such determination and follow-up investigation will be made by a child protective agency.

Failure to report suspected child abuse may result in disciplinary action up to and including release from at-will employment.

Training

The Charter School shall provide training to all new personnel regarding the obligations as Mandatory Reporters and the steps required to report suspected abuse. Child abuse reporting procedures are reviewed yearly for all returning Charter School employees.

Notifications

The Campus Principal, Vice Principal or designee shall provide all new employees who are mandated reporters a statement that informs them of their status as mandated reporters and their reporting obligations under Penal Code 11166. Before beginning employment, employees shall sign the statement indicating that they have knowledge of the reporting obligations under Penal

Code 11166 and that they will comply with those provisions. The signed statements shall be retained by the Campus Principal, Vice Principal or designee

(B) Emergency Preparedness and Crisis Response Plan

Additional code references: Educational Code 35295-35297; Government Code 8607 and 3100

The GVA Board recognizes that all district staff and students must be prepared to respond quickly and responsibly to emergencies, disasters, and threats of disaster. The CEO or designee shall develop and maintain a disaster preparedness plan which details provisions for handling emergencies and disasters and which shall be included in the district's comprehensive school safety plan. These plans will be developed in compliance with the California Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS). School employees are considered disaster service workers and are subject to disaster service activities assigned to them.

The Great Valley Academy emergency preparedness and crisis response plans are included in the appendices, and accomplish the following:

- **Appendix C: GVA Emergency Operations and Response**, incorporates strategies of the Incident Command System (ICS), SEMS and NIMS, and
- **Appendix C.1: GVA Crisis Response Team with Contacts – Confidential** provides emergency contact information for district staff
- **Appendix C.2: GVA Emergency Response Procedures Flipchart – For Official Use Only (FOUO) Flipchart** describes detailed steps to be taken by all personnel and students for a safe and effective response to emergencies and provides specific evacuation procedures for the School Office and school sites developed with considerations for students with physical disabilities

(i) Earthquake and Multi-hazard Emergency Response Procedure System

GVA has defined emergency response procedures for earthquakes and other hazards in the Crisis Response Plans described in the appendices of this plan. This district follows the recommended “drop, cover and hold on” procedures for earthquake response. The plans also align with standards established by NIMS and SEMS and call for response actions to be coordinated using ICS. Additional details on the implementation of these plans, including roles and responsibilities for school personnel, are included as part of the School Emergency Response Procedures flipcharts. These additional supporting plans are provided to school personnel as references and are not included as part of this public document.

(ii) Use of School Buildings for Emergency Shelters

The Board shall grant the use of school buildings, grounds, and equipment to public agencies, including the American Red Cross, for mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare. The Board shall cooperate with such agencies in furnishing and maintaining whatever services they deem necessary to meet the community's needs.

(C) School Suspension, Expulsion and Mandatory Expulsion Guidelines

Additional code reference: Education Code 48900, 48915 (d) and (c)

The GVA Board desires to prepare students for responsible citizenship by fostering self-discipline and the acceptance of personal responsibility. The Board believes that high expectations for student behavior, effective classroom management and parent involvement can minimize the need for discipline. This policy also states that staff shall use preventative measures and positive conflict resolution techniques whenever possible.

The GVA Board has established policies and standards of behavior in order to promote learning and protect the safety and well being of all students. When these policies and standards are violated, it may be necessary to suspend or expel a student from regular classroom instruction. Except where suspension for a first offense is warranted in accordance with law, suspension shall be imposed only when other means of correction fail to bring about proper conduct.

The policy also describes the guidelines, in accordance with state and federal law, Suspension and Expulsion Procedure.

For campus-specific guidelines for suspension and expulsion of students, including behavior that may result in suspension or expulsion on the first offense, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office, and filed under Appendix D: Student and Parent Handbooks.

(D) Procedures to Notify Teachers of Dangerous Pupils

Additional code reference: Education Code 49079

The CEO or designee shall ensure that employees are informed, in accordance with law, regarding crimes and offenses by students who may pose a danger in the classroom.

When any individual directs violence against an employee and the employee so notifies the CEO or designee, the CEO or designee shall take steps to ensure that appropriate legal measures are instituted. When the employee notifies the CEO or designee of a threat of bodily harm, the CEO or designee shall take appropriate measures to enable the employee to request assistance if a threat occurs on school grounds.

The CEO or designee shall ensure that employees are trained in crisis prevention and intervention techniques in order to protect themselves and students. Staff development may include training in classroom management, effective communication techniques and crisis resolution.

(E) Discrimination, Harassment, Intimidation and Bullying Policies

Additional code reference: Education Code 200-262.4

GVA's comprehensive prohibition of discrimination, harassment, and bullying across all school programs and activities states that the Board of Education is committed to equal opportunity for all individuals in education. School programs and activities shall be free from discrimination based on gender, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation or the perception of

one or more of such characteristics. The Board shall promote programs that ensure that discriminatory practices are eliminated in all activities.

Among the policies included in this comprehensive set of anti-discrimination and harassment policies are four that clearly define the expectations and procedures regarding occurrences of discrimination, harassment, intimidation and bullying:

GVA determines that district programs and activities shall be free from discrimination, including harassment, with respect to a student's actual or perceived sex, gender, ethnic group identification, race, national origin, religion, color, physical or mental disability, age or sexual orientation.

The Board of Education shall ensure equal opportunities for all students in admission and access to the educational program, guidance and counseling programs, athletic programs, testing procedures, and other activities. School staff and volunteers shall carefully guard against segregation, bias and stereotyping in instruction, guidance and supervision.

Students who harass other students shall be subject to appropriate discipline, up to and including counseling, suspension and/or expulsion. An employee who permits or engages in harassment may be subject to disciplinary action, up to and including dismissal.

The CEO of GVA is committed to maintaining an educational environment that is free from harassment. The Board prohibits sexual harassment of students by other students, employees or other persons, at school or at school-sponsored or school-related activities. The Board also prohibits retaliatory behavior or action against persons who complain, testify, assist or otherwise participate in the complaint process established pursuant to this policy and the administrative regulation.

Any student who engages in harassment, including sexual harassment, of anyone at school or at a school-sponsored or school-related activity is in violation of this policy and shall be subject to disciplinary action. For students in grades 4 through 12, disciplinary action may include suspension and/or expulsion, provided that in imposing such discipline the entire circumstances of the incident(s) shall be taken into account.

For campus-specific bullying and cyber-bullying policies, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office.

(F) School-wide Uniform Policy

Additional code reference: Education Code 35183

The GVA Board expects that students will present themselves in an orderly manner conducive to the advancement of education. Their appearance should be neat and acceptable to the general society and appropriate to activities at school. The Board considers this to be a judgment area for the principal of each school and specific rules will be an administrative decision.

Uniforms

Students and staff at Great Valley Academy will wear uniforms daily. We have chosen uniforms because they:

- Allow students and staff to focus on learning
- Help eliminate student or staff judging each other because of brand names, etc.
- Improve the safety and security of the school
- Improve behavior and discipline in the school
- Help develop a sense of unity
- Ensure that appropriate clothing will be worn to school
- Emphasize the individuality of each child

For campus-specific uniform policies, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office.

(G) Procedure for Safe Ingress and Egress to and from School

Great Valley Academy has established procedures to ensure the Safe Ingress and Egress of students, parents, and school employees to and from school. The list below shows applicable board policies and administrative regulations and how they contribute to this safety component:

- To assist students in safely crossing streets adjacent to or near school sites, the Board may establish a safety patrol. The CEO or designee shall periodically examine traffic patterns within school attendance areas in order to identify locations where crossing assistance may be needed.
- GVA holds students accountable for conduct not only on campus but also on their way to and from school.
- GVA holds visitors accountable to signing in at the front office. Visitors will be asked to show identification if not recognized. Visitors will be asked to place a visitors label on their shirt.
- Checking students out of school. Parents will need to sign their child out and will be giving a B.Y.E. (Bridge to your home environment) slip to give to their child's teacher.
- Parents will be required to sign their child in at the office.
- GVA prohibits the possession of weapons, imitation firearms or dangerous instruments of any kind, including when on their way to and from school.
- If a student flees campus staff personnel calls administration. Administration will call parents and Police Department to receive guidance.

Each school site will also identify emergency evacuation routes identifying locations where students may assemble in response to fire, earthquake, bomb threats or other similar hazards. A map showing emergency evacuation procedures for each campus is included in **Appendix C.2: GVA Emergency Response Procedures Flipchart**.

In addition to the safety measures defined above, student safety will also be ensured through the control of the ingress and egress of campus visitors.

To ensure the safety of students and staff and avoid potential disruptions, all visitors shall register immediately upon entering any school building or grounds.

For purposes of school safety and security, the principal or designee will develop and ensure use of a visible means of identification for visitors while on school premises.

Additional code references: Education Code 32210-32211, Penal Code 627

(H)School Discipline Rules and Consequences

Additional code references: Education Code 35291 and 35291.5

GVA identifies school-wide standards for student conduct:

The GVA Board believes that all students have the right to be educated in a positive learning environment free from disruptions. Students shall be expected to exhibit appropriate conduct that does not infringe upon the rights of others or interfere with the school program while on school grounds, while going to or coming from school, while at school activities, and while on school trips.

The CEO or designee shall ensure that each school site develops standards of conduct and discipline consistent with district policies and administrative regulations. Students and parents/guardians shall be notified of school rules related to conduct.

Refer to Student/Parent Handbook for Prohibited Behaviors.

Students who violate school rules and regulations may be subject to discipline including, but not limited to, suspension, expulsion, and contact with local law enforcement as appropriate.

Students also may be subject to discipline for any off-campus conduct during non-school hours that poses a threat or danger to the safety of students, staff, or district property or disrupts the orderly delivery of the educational program.

At GVA, students may possess or use on school campus personal electronic signaling devices including, but not limited to, pagers and cellular/digital telephones, tablets, as well as other mobile communications devices including, but not limited to, digital media players, personal digital assistants (PDAs), compact disc players, portable game consoles, cameras, digital scanners, and laptop computers, provided that such devices do not disrupt the educational program or school activity and are not used for illegal or unethical activities such as cheating on assignments or tests. Devices are turned off during class time and at any other time directed by a GVA employee.

If a disruption occurs or a student uses any mobile communications device for improper activities, a school employee shall direct the student to turn off the device and/or shall confiscate it. If the school employee finds it necessary to confiscate the device, he/she shall return it at the end of the class period or school day.

A school official may search a student's mobile communications device, including, but not limited to, reviewing messages or viewing pictures.

For a comprehensive description of conduct and student behavior expectations, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office, and filed under Appendix D: Student and Parent Handbooks.

GVA describes standards for discipline and provides administrative guidance for the consequences of misconduct:

The GVA Board desires to prepare students for responsible citizenship by fostering self-discipline and personal responsibility. The Board believes that high expectations for student behavior, effective classroom management and parent involvement can minimize the need for discipline. Staff shall use preventative measures and positive conflict resolution techniques whenever possible.

When misconduct occurs, staff shall implement appropriate discipline and attempt to identify and address the causes of the student's behavior. At all times, the safety of students and staff and the maintenance of an orderly school environment shall be priorities in determining appropriate discipline.

Additional Policies are listed below, which describe overarching discipline standards for specific area of concern. Violation of these items will result in student referral to campus administration and may lead to suspension or expulsion. These include:

(I) Hate Crime Reporting Procedures and Policies

The GVA Board desires to protect the right of every student to be free from hate-motivated behavior. The Board will promote harmonious relationships that enable students to gain a true understanding of the civil rights and social responsibilities of people in our society. GVA prohibits discriminatory behavior or statements that degrade an individual on the basis of his/her race, ethnicity, culture, heritage, gender, sexual orientation, physical/mental attributes, or religious beliefs or practices.

Any student who feels that he/she is a victim of hate-motivated behavior shall immediately contact the principal or designee. Staff who receive notice of hate-motivated behavior or personally observe such behavior shall notify the principal or designee, and/or law enforcement, as appropriate. Students demonstrating hate-motivated behavior shall be subject to discipline in accordance with law, Board policy and administrative regulation.

In addition, the GVA shall provide counseling, guidance, and support to students who are victims of hate-motivated behavior and to students who exhibit such behavior.

Safety Plan Review, Evaluation and Amendment Procedures

The Great Valley Academy comprehensive safety plan will be reviewed, evaluated and amended (if necessary) in January of each school year.

Great Valley Academy adopted this annual comprehensive school safety plan at the regular meeting of the Board of Education as noted on the cover page. An opportunity for public comment was provided during this meeting, prior to the plan's adoption. Documentation of this meeting, which may include the meeting agenda, minutes and copies of materials provided for the plan presentation, will be filed alongside the plan and recorded in Appendix A: Documented Safety Planning Process.

An updated file containing all appropriate or required safety related plans and materials are available for public inspection in Great Valley Academy front office.

Safety Plan Appendices

Protected Information

The preceding Comprehensive School Safety Plan is a public document to be available for review in the School Office at any time during regular business hours, as mandated by Education Code 32282 (e). However, some appendices within this section may include proprietary information that shall not be released to the general public including personal contact information for staff members, detailed security procedures for campus crisis response and campus vulnerability assessment information.

As protected under the California Public Records Act (Government Code 6254 parts *c* and *aa*) and prescribed by GVA, the following items will be identified as “**Confidential**”, reviewed only in a closed session of the GVA Board of Education and withheld from public release of the Comprehensive District Safety Plan:

- Any appendices containing personnel information that the disclosure of which would constitute an unwarranted invasion of personal privacy.
(Further detail on protected information is also defined in Government Code Section 6254.3.)
- Any appendices prepared to assess School Office and/or school site vulnerabilities to terrorist or other criminal acts intended to disrupt School Office operations.

According to the procedures developed by the Department of Homeland Security and defined in DHS Management Directive 11042.1, the following items will be designated “**For Official Use Only (FOUO)**”, reviewed only in a closed session of the GVA Board and released only for official safety assurance or crisis response use:

- Any appendices containing detailed crisis response information that, if disclosed, would undermine plans or procedures designed to protect students from harm by revealing safety strategies such as but not limited to critical communications systems, crisis response facilities (i.e. command post, staging areas, etc), and supplies storage.

Appendix A: Documented Safety Planning Process

Activity Description <i>(i.e. review steps, meetings conducted, approvals, etc)</i>	Date, Time
GVA Site Safety Strategic Planning- with Consultant Group	8/18/21 9/16/21 12/16/21
Staff Training	11/19/21 12/3/21 12/10/21

Appendix B: Forms

Cover sheet only – insert all appropriate forms behind this page.

Included Forms:

- 1) Mandated Reporter Child Abuse Report Form

Appendix C: GVA Emergency Operations and Response

The following sections provide key information for crisis response for GVA. While this information represents the basic tools needed for an effective crisis response, GVA will continue to assess, revise and expand on the plan for continuous improvement in student safety. Additional documentation will be referenced in this Comprehensive School Safety Plan as it is developed and implemented.

***Appendix C.1: GVA Crisis Response Team with Contacts –
Confidential***

Cover sheet only – insert the GVA Crisis Response Team Roster behind this page, except in any publicly distributed versions of this document.

***Appendix C.2: GVA Emergency Response Procedures Flipchart –
(For Official Use Only)***

Cover sheet only – insert the GVA Emergency Response Procedures Flipchart in preview format (un-cut and not assembled in flipchart folder) behind this page behind this page, except in any publicly distributed versions of this document.

Appendix D: Student and Parent Handbooks

This section shall include current copies of student and parent handbooks for Great Valley Academy.



Great Valley Academy Salida

2022-2023 Comprehensive School Safety Plan

This Comprehensive School Safety Plan was developed collaboratively with key stakeholders and adopted by the Great Valley Academy Board of Education on March 29, 2022

***GVA Salida Board
Approval Confirmed
by:***

Name	Title	Signature	Date
Steve Payne	Board President		
Leah Silvestre Franklin	CEO		

This document is to be maintained for public inspection in the School Office during regular business hours.

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Comprehensive Safety Plan Purpose & Compliance

The California Education Code (sections 32280-32288) outlines the requirements of all school districts operating any schools serving grades kindergarten through 12, inclusive, to write and develop a school safety plan relevant to the needs and resources of that particular school. Education Code does not require charter schools to have a safety plan. GVA has taken the opportunity to have a safety plan in order to have specific procedures in place in case of an emergency.

In 2004, the Legislature and Governor recast and renumbered the Comprehensive School Safety Plan provisions in SB 719 and AB 115. It is the intent of the Legislature in enacting the provisions to support California public schools as they develop their mandated comprehensive safety plans that are the result of a systematic planning process, that include strategies aimed at the prevention of, and education about, potential incidents involving crime and violence on school campuses.

The historical requirement of the Comprehensive School Safety Plan was presented in Senate Bill 187, which was approved by the Governor and chaptered in 1997. This legislation contained a sunset clause that stated that this legislation would remain in effect only until January 1, 2000. Senate Bill 334 was approved and chaptered in 1999 and perpetuated this legislation under the requirement of the initial legislation.

Comprehensive School Safety Plans must include the following elements:

- Assessment of school crime committed on school campuses and at school-related functions
- Child abuse reporting procedures
- Disaster procedures and procedures to allow a public agency to use school facilities for mass care and welfare shelters during an emergency
- Suspension and expulsion policies
- Procedures to notify teachers of dangerous pupils
- Discrimination, harassment, intimidation and bullying School-wide dress code policies
- Procedures for safe ingress and egress
- Policies enacted to maintain a safe and orderly environment
- Rules regarding access to school campus
- Rules and procedures on school discipline
- A crisis response plan
- Hate crime reporting procedures

The Comprehensive School Safety Plan will be reviewed and updated by March of each year. In July of every year, the school will report on the status of its school safety plan including a description of its key elements in the annual school accountability report card.

Small school districts (with an enrollment of 2,500 students or less) may develop a comprehensive district safety plan to encompass all schools within the district, which would fulfill each individual school's comprehensive safety plan requirement. It is not required that small school districts have their safety plans developed or approved by site councils or

designated safety committees; the plans must only be approved by the district board of trustees. However, a district plan should be developed in cooperation with local law enforcement agencies, community leaders, parents, pupils, teachers, administrators, and others who may be interested in the prevention of campus crime and violence.

GVA recognizes that students and staff have the right to a safe and secure campus where they are free from physical and psychological harm. The Board is fully committed to maximizing school safety and creating a positive learning environment that teaches strategies for violence prevention and emphasizes high expectations for student conduct, responsible behavior, and respect for others.

The Board shall review the comprehensive district wide and/or school safety plan(s) in order to ensure compliance with state law, Board policy and administrative regulation. Approval of the plan shall occur at a regularly scheduled meeting.

A copy of the comprehensive school safety plan shall be available for review at the Great Valley Academy, school administration offices and online at www.greatvalleyacademy.com

GVA Mission and Operating Principles

Vision

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

Mission

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Philosophy

At Great Valley Academy, we believe:

- Every child is unique and can learn like a gifted learner – visually.
- Students deserve the opportunity to have instruction delivered in a way that is relevant and meaningful.
- School should be a non-threatening environment that emphasizes relationships.
- Character education should be taught, modeled and assessed.
- Highly trained, motivated teachers are essential.
- Parental involvement and support is an essential element of a quality educational experience.

GVA 5 Pillars

1. Great Valley Smart (GVS®)
2. Character Development
3. Climate: Safe/Loved/Learning
4. Mastery Learning
5. Highly Qualified and Dedicated Staff

Safety Plan Vision

To support the vision, mission and the five pillars of Great Valley Academy, we strive for a safe, respectful and nurturing learning environment where students are empowered to achieve through strong connections to their school and community.

Working together with our community partners, we will provide a safe campus environment by effectively identifying and addressing issues that potentially degrade our schools' social and physical climate.

Components of the Comprehensive School Safety Plan

GVA Safety Planning Team Members and Contributors

- Russ Howell - Principal
- Roop Pannu -Vice Principal
- Kashni Wahid – Vice Principal
- – GVA Kids Care Director
- Donnie Cook – Facilities Supervisor
- Nate Matthews – Facilities
- Stacy Schleigh – Administrator assistant

Campus Safety Strategies and Programs

Education Code Section 32282(a)(2)(A)-(J)

GVA recognizes the importance of providing a safe school environment that is conducive to learning and helps ensure student safety and the prevention of student injury. The CEO or designee shall implement appropriate practices to minimize the risk of harm to students, including, but not limited to, practices relative to school facilities and equipment, the outdoor environment, educational programs, and school-sponsored activities.

(A) Child Abuse Reporting Procedures

Additional code references: Education Code Section 32282(a)(2)(A); Penal Code Section 11164 et seq.

GVA has a responsibility to protect students by facilitating prompt reporting of known and suspected incidents of child abuse and neglect. Specifically, California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance to **Child Protective Services (CPS)** immediately, or as soon as practically possible.

Child abuse should be reported immediately by phone, or as soon as practically possible, to the county **Child Protective Services** agency. The phone call is to be followed by a written report prepared by the employee within thirty-six (36) hours, which may be sent by fax or electronically. This procedure is outlined in more detail in the Reporting Procedures section, below.

Reporting the information regarding a case of possible child abuse or neglect to your supervisor, the School principal, coworker or other person shall not be a substitute for making a mandated report to **Child Protective Services**.

Definitions

1. “Child Abuse” or “neglect” includes the following:
 - a. A physical injury inflicted by other than accidental means on a child by another person.

- b. Sexual abuse of a child.
- c. Willful cruelty or unjustifiable punishment of a child, or willfully inflicting unjustifiable physical pain or mental suffering, or failure to safeguard a child from these injuries when the child is under a person's care or custody.
- d. Unlawful corporal punishment or injury resulting in a traumatic condition.
- e. Neglect of a child or abuse in out-of-home care.

Child abuse and/or neglect includes both acts and omissions on the part of the responsible person.

- 2. "Mandated Reporters" include, but are not limited to, teachers; instructional aides; teacher's aides or assistants; designated classified employees; certificated pupil personnel employees; administrative officers or supervisors of child attendance; administrators and employees of a licensed day care facility; Head Start teachers; district police or security officers; and administrators, presenters, or counselors of a child abuse prevention program.
- 3. "Child Protective Agencies" are those law enforcement and child protective services responsible for investigating child abuse reports, including the local police or sheriff department, county welfare or juvenile probation department and child protective services.
- 4. "Reasonable Suspicion" means that it is objectively reasonable for a person to entertain such a suspicion, based upon facts that could cause a reasonable person in a like position, drawing when appropriate on his/her training and experience, to suspect child abuse.
- 5. "Child" means any person under 18 years of age.

Reporting Procedures

- 1. **Step #1: Telephone Report.** Immediately or as soon as practicably possible after knowing or observing suspected child abuse or neglect, a mandated reporter shall make an initial report by telephone to a child protective agency or law enforcement agency.
 - a. This report will include:
 - 1. The name of the person making the report.
 - 2. The name of the child.
 - 3. The present location of the child.
 - 4. The nature and extent of any injury.
 - 5. Any other information requested by the child protective agency, including the information that led the Mandated Reporter to gain knowledge of or suspect child abuse.
 - (i) When the verbal report is made, the employee shall note in writing the name of the official contacted, the date and time contacted, and any instructions or advice received.
 - b. If the agency asks the child be held until authorities arrive, the employee must remain with the child.

2. Step #2: Written Report

- a. Within 36 hours of making the telephone report, the employee shall complete and mail to the local child protective agency (or law enforcement as appropriate) a written report, "Suspected Child Abuse Report," which includes a completed Department of Justice form (DOJ SS 8572). The DOJ SS 8572 Form is available at http://ag.ca.gov/childabuse/pdf/ss_8572.pdf.
- b. The written report is to be addressed to the person to whom the telephone report was made.

3. Step #3: Internal Reporting

- a. Employees reporting child abuse or neglect to an appropriate agency are encouraged, but not required, to notify the Campus Principal, Vice Principal or designee as soon as possible after the initial telephone report to the appropriate agency. The Campus Principal, Vice Principal, or designee so notified shall provide the mandated reporter with any assistance necessary to ensure that reporting procedures are carried out in accordance with law, Board policy, and administrative regulation. At the mandated reporter's request, the Campus Principal, Vice Principal, or designee may assist in completing and filing the necessary forms. The mandated reporter shall not be required to disclose his/her identity to the Campus Principal or Vice Principal.
- b. He/she may provide or mail a copy of the written report to the Campus Principal, Vice Principal or designee without his/her signature or name. Reporting the information to an employer, supervisor, school principal, school counselor, co-worker, or other person shall not be a substitute for making a mandated report to the appropriate agency.

Legal Responsibility and Liability

1. Mandated Reporters have absolute immunity. School employees required to report are not civilly or criminally liable for filing a required or authorized report of known or suspected child abuse. This immunity shall apply even if the Mandated Reporter acquired the knowledge or reasonable suspicion of child abuse or neglect outside of his or her professional capacity or outside the scope of his or her employment.
2. If a Mandated Reporter fails to report an instance of child abuse which he/she knows to exist or reasonably should know to exist, he/she is guilty of a misdemeanor punishable by confinement in jail for up to six months, a fine of up to \$1,000, or both. The Mandated Reporter may also be held personally liable for damages resulting from any injury to the child after a failure to report and could incur costs of defense and any subsequent damages to the child.
3. All employees are subject to disciplinary action for failure to report suspected child abuse pursuant to this policy. Moreover, the Charter School is not obligated to defend an employee who neglects or fails to make a required report.

4. When two or more persons who are required to report have joint knowledge of a suspected instance of child abuse or neglect, and when there is agreement among them, the telephone report shall be made by a member of the team selected by mutual agreement and a single written report made and signed by the selected member of the reporting team. However, if any member of the reporting team knows or should know that the selected member failed to make the report, that member thereafter has a duty to do make the report.
5. The duty to report child abuse is an individual duty and no supervisor or administrator may impede or inhibit such reporting duties. Furthermore, no person making such a report shall be subject to any sanction.

Victim Interviews

Upon request, a child protective agency representative may interview a suspected victim of child abuse during school hours, on school premises, concerning a report of suspected child abuse or neglect that occurred within the child's home or out-of-home care. The child shall be given the choice of being interviewed in private or in the presence of any adult school employee or volunteer aide selected by the child.

A staff member or volunteer aide selected by a child may decline to be present at the interview. If the selected person accepts, the principal or designee shall inform him/her, before the interview takes place, of the following legal requirements:

1. The purpose of the selected person's presence at the interview is to lend support to the child and enable him/her to be as comfortable as possible.
2. The selected person shall not participate in the interview.
3. The selected person shall not discuss the facts or circumstances of the case with the child.
4. The selected person is subject to the confidentiality requirements of the Child Abuse and Reporting Act, a violation of which is punishable as specified in Penal Code 11167.5.

If a staff member agrees to be present, the interview shall be held at a time during school hours when it does not involve an expense to the school

Release of Child to Peace Officer or Child Protective Services Agent

When a child is released to a peace officer or child protective services agent and taken into custody as a victim of suspected child abuse, the Campus Principal, Vice Principal or designee shall not notify the parent/guardian as required in other instances of removal of a child from school, but rather shall provide the peace officer or agent with the address and telephone number of the child's parent/guardian. It is the responsibility of the peace officer or agent to notify the parent/guardian of the situation.

Peace officers and child protective services agents will be asked to sign an appropriate release or acceptance of responsibility form before removing a child from school grounds.

When School Employees are Accused of Child Abuse

Regardless of the identity of the suspected child abuser, the major responsibilities of Mandated Reporters are to: 1) identify incidents of suspected child abuse, and 2) comply with laws requiring the reporting of suspected abuse to the proper authorities. Determining whether or not the suspected abuse actually occurred is not the responsibility of the school employee. Such determination and follow-up investigation will be made by a child protective agency. Failure to report suspected child abuse may result in disciplinary action up to and including release from at-will employment.

Training

The Charter School shall provide training to all new personnel regarding the obligations as Mandatory Reporters and the steps required to report suspected abuse. Child abuse reporting procedures are reviewed yearly for all returning Charter School employees.

Notifications

The Campus Principal, Vice Principal or designee shall provide all new employees who are mandated reporters a statement that informs them of their status as mandated reporters and their reporting obligations under Penal Code 11166. Before beginning employment, employees shall sign the statement indicating that they have knowledge of the reporting obligations under Penal Code 11166 and that they will comply with those provisions. The signed statements shall be retained by the Campus Principal, Vice Principal or designee

(B) Emergency Preparedness and Crisis Response Plan

Additional code references: Educational Code 35295-35297; Government Code 8607 and 3100

The GVA Board recognizes that all district staff and students must be prepared to respond quickly and responsibly to emergencies, disasters, and threats of disaster. The CEO or designee shall develop and maintain a disaster preparedness plan which details provisions for handling emergencies and disasters and which shall be included in the district's comprehensive school safety plan. These plans will be developed in compliance with the California Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS). School employees are considered disaster service workers and are subject to disaster service activities assigned to them.

The Great Valley Academy emergency preparedness and crisis response plans are included in the appendices, and accomplish the following:

- **Appendix C: GVA Emergency Operations and Response**, incorporates strategies of the Incident Command System (ICS), SEMS and NIMS, and
- **Appendix C.1: GVA Crisis Response Team with Contacts – Confidential** provides emergency contact information for district staff
- **Appendix C.2: GVA Emergency Response Procedures Flipchart – For Official Use Only (FOUO) Flipchart** describes detailed steps to be taken by all personnel and students for a safe and effective response to emergencies and provides specific

evacuation procedures for the School Office and school sites developed with considerations for students with physical disabilities

(i) Earthquake and Multi-hazard Emergency Response Procedure System

GVA has defined emergency response procedures for earthquakes and other hazards in the Crisis Response Plans described in the appendices of this plan. This district follows the recommended “drop, cover and hold on” procedures for earthquake response. The plans also align with standards established by NIMS and SEMS and call for response actions to be coordinated using ICS. Additional details on the implementation of these plans, including roles and responsibilities for school personnel, are included as part of the School Emergency Response Procedures flipcharts. These additional supporting plans are provided to school personnel as references and are not included as part of this public document.

(ii) Use of School Buildings for Emergency Shelters

The Board shall grant the use of school buildings, grounds, and equipment to public agencies, including the American Red Cross, for mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare. The Board shall cooperate with such agencies in furnishing and maintaining whatever services they deem necessary to meet the community’s needs.

(C) School Suspension, Expulsion and Mandatory Expulsion Guidelines

Additional code reference: Education Code 48900, 48915 (d) and (c)

The GVA Board desires to prepare students for responsible citizenship by fostering self-discipline and the acceptance of personal responsibility. The Board believes that high expectations for student behavior, effective classroom management and parent involvement can minimize the need for discipline. This policy also states that staff shall use preventative measures and positive conflict resolution techniques whenever possible.

The GVA Board has established policies and standards of behavior in order to promote learning and protect the safety and wellbeing of all students. When these policies and standards are violated, it may be necessary to suspend or expel a student from regular classroom instruction. Except where suspension for a first offense is warranted in accordance with law, suspension shall be imposed only when other means of correction fail to bring about proper conduct.

The policy also describes the guidelines, in accordance with state and federal law, Suspension and Expulsion Procedure.

For campus-specific guidelines for suspension and expulsion of students, including behavior that may result in suspension or expulsion on the first offense, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office, and filed under Appendix D: Student and Parent Handbooks.

(D) Procedures to Notify Teachers of Dangerous Pupils

Additional code reference: Education Code 49079

The CEO or designee shall ensure that employees are informed, in accordance with law, regarding crimes and offenses by students who may pose a danger in the classroom.

When any individual directs violence against an employee and the employee so notifies the CEO or designee, the CEO or designee shall take steps to ensure that appropriate legal measures are instituted. When the employee notifies the CEO or designee of a threat of bodily harm, the CEO or designee shall take appropriate measures to enable the employee to request assistance if a threat occurs on school grounds.

The CEO or designee shall ensure that employees are trained in crisis prevention and intervention techniques in order to protect themselves and students. Staff development may include training in classroom management, effective communication techniques and crisis resolution.

(E) Discrimination, Harassment, Intimidation and Bullying Policies

Additional code reference: Education Code 200-262.4

GVA's comprehensive prohibition of discrimination and harassment across all school programs and activities states that the Board of Education is committed to equal opportunity for all individuals in education. School programs and activities shall be free from discrimination based on gender, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation or the perception of one or more of such characteristics. The Board shall promote programs that ensure that discriminatory practices are eliminated in all activities.

Among the policies included in this comprehensive set of anti-discrimination and harassment policies are four that clearly define the expectations and procedures regarding occurrences of discrimination, harassment, intimidation and bullying:

GVA determines that district programs and activities shall be free from discrimination, including harassment, with respect to a student's actual or perceived sex, gender, ethnic group identification, race, national origin, religion, color, physical or mental disability, age or sexual orientation.

The Board of Education shall ensure equal opportunities for all students in admission and access to the educational program, guidance and counseling programs, athletic programs, testing procedures, and other activities. School staff and volunteers shall carefully guard against segregation, bias and stereotyping in instruction, guidance and supervision.

Students who harass other students shall be subject to appropriate discipline, up to and including counseling, suspension and/or expulsion. An employee who permits or engages in harassment may be subject to disciplinary action, up to and including dismissal.

The CEO of GVA is committed to maintaining an educational environment that is free from harassment. The Board prohibits sexual harassment of students by other students, employees or other persons, at school or at school-sponsored or school-related activities. The Board also prohibits retaliatory behavior or action against persons who complain, testify, assist or otherwise participate in the complaint process established pursuant to this policy and the administrative regulation.

Any student who engages in harassment, including sexual harassment, of anyone at school or at a school-sponsored or school-related activity is in violation of this policy and shall be subject to disciplinary action. For students in grades 4 through 12, disciplinary action may include suspension and/or expulsion, provided that in imposing such discipline the entire circumstances of the incident(s) shall be taken into account.

For campus-specific bullying and cyber-bullying policies, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office.

(F) School-wide Uniform Policy

Additional code reference: Education Code 35183

The GVA Board expects that students will present themselves in an orderly manner conducive to the advancement of education. Their appearance should be neat and acceptable to the general society and appropriate to activities at school. The Board considers this to be a judgment area for the principal of each school and specific rules will be an administrative decision.

Uniforms

Students and staff at Great Valley Academy will wear uniforms daily. We have chosen uniforms because they:

- Allow students and staff to focus on learning
- Help eliminate student or staff judging each other because of brand names, etc.
- Improve the safety and security of the school
- Improve behavior and discipline in the school
- Help develop a sense of unity
- Ensure that appropriate clothing will be worn to school
- Emphasize the individuality of each child

For campus-specific uniform policies, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office.

(G) Procedure for Safe Ingress and Egress to and from School

Great Valley Academy has established procedures to ensure the Safe Ingress and Egress of students, parents, and school employees to and from school. The list below shows applicable board policies and administrative regulations and how they contribute to this safety component:

- To assist students in safely crossing streets adjacent to or near school sites, the Board may establish a safety patrol. The CEO or designee shall periodically examine traffic patterns within school attendance areas in order to identify locations where crossing assistance may be needed.
- GVA holds students accountable for conduct not only on campus but also on their way to and from school.
- GVA holds visitors accountable to signing in at the front office. Visitors will be asked to show identification if not recognized. Visitors will be asked to place a visitors label on their shirt.

- Checking students out of school. Parents will need to sign their child out and will be giving a pass to give to their child's teacher.
- Parents will be required to sign their child in at the office.
- GVA prohibits the possession of weapons, imitation firearms or dangerous instruments of any kind, including when on their way to and from school.

Each school site will also identify emergency evacuation routes identifying locations where students may assemble in response to fire, earthquake, bomb threats or other similar hazards. A map showing emergency evacuation procedures for each campus is included in **Appendix C.2: GVA Emergency Response Procedures Flipchart**.

In addition to the safety measures defined above, student safety will also be ensured through the control of the ingress and egress of campus visitors.

To ensure the safety of students and staff and avoid potential disruptions, all visitors shall register immediately upon entering any school building or grounds.

For purposes of school safety and security, the principal or designee will develop and ensure use of a visible means of identification for visitors while on school premises.

Additional code references: Education Code 32210-32211, Penal Code 627

(H)School Discipline Rules and Consequences

Additional code references: Education Code 35291 and 35291.5

GVA identifies school-wide standards for student conduct:

The GVA Board believes that all students have the right to be educated in a positive learning environment free from disruptions. Students shall be expected to exhibit appropriate conduct that does not infringe upon the rights of others or interfere with the school program while on school grounds, while going to or coming from school, while at school activities, and while on school trips.

The CEO or designee shall ensure that each school site develops standards of conduct and discipline consistent with district policies and administrative regulations. Students and parents/guardians shall be notified of school rules related to conduct.

Refer to Student/Parent Handbook for Prohibited Behaviors.

Students who violate school rules and regulations may be subject to discipline including, but not limited to, suspension, expulsion, and contact with local law enforcement as appropriate.

Students also may be subject to discipline for any off-campus conduct during non-school hours that poses a threat or danger to the safety of students, staff, or district property or disrupts the orderly delivery of the educational program.

At GVA, students may possess or use on school campus personal electronic signaling devices including, but not limited to, pagers and cellular/digital telephones, tablets, as well as other mobile communications devices including, but not limited to, digital media players, personal digital assistants (PDAs), compact disc players, portable game consoles, cameras, digital scanners, and laptop computers, provided that such devices do not disrupt the educational program or school activity and are not used for illegal or unethical activities such as cheating on assignments or tests. Devices are turned off during class time and at any other time directed by a GVA employee.

If a disruption occurs or a student uses any mobile communications device for improper activities, a school employee shall direct the student to turn off the device and/or shall confiscate it. If the school employee finds it necessary to confiscate the device, he/she shall return it at the end of the class period or school day.

A school official may search a student's mobile communications device, including, but not limited to, reviewing messages or viewing pictures.

For a comprehensive description of conduct and student behavior expectations, please refer to the Student and Parent Handbook distributed to all students at the start of each school year. Current versions will be available for review alongside this comprehensive safety plan in the school office, and filed under Appendix D: Student and Parent Handbooks.

GVA describes standards for discipline and provides administrative guidance for the consequences of misconduct:

The GVA Board desires to prepare students for responsible citizenship by fostering self-discipline and personal responsibility. The Board believes that high expectations for student behavior, effective classroom management and parent involvement can minimize the need for discipline. Staff shall use preventative measures and positive conflict resolution techniques whenever possible.

When misconduct occurs, staff shall implement appropriate discipline and attempt to identify and address the causes of the student's behavior. At all times, the safety of students and staff and the maintenance of an orderly school environment shall be priorities in determining appropriate discipline.

Additional Policies are listed below, which describe overarching discipline standards for specific area of concern. Violation of these items will result in student referral to campus administration and may lead to suspension or expulsion. These include:

(I) Hate Crime Reporting Procedures and Policies

The GVA Board desires to protect the right of every student to be free from hate-motivated behavior. The Board will promote harmonious relationships that enable students to gain a true understanding of the civil rights and social responsibilities of people in our society. GVA prohibits discriminatory behavior or statements that degrade an individual on the basis of his/her race, ethnicity, culture, heritage, gender, sexual orientation, physical/mental attributes, or religious beliefs or practices.

Any student who feels that he/she is a victim of hate-motivated behavior shall immediately contact the principal or designee. Staff who receive notice of hate-motivated behavior or personally observe such behavior shall notify the principal or designee, and/or law enforcement, as appropriate. Students demonstrating hate-motivated behavior shall be subject to discipline in accordance with law, Board policy and administrative regulation.

In addition, the GVA shall provide counseling, guidance, and support to students who are victims of hate-motivated behavior and to students who exhibit such behavior.

Safety Plan Review, Evaluation and Amendment Procedures

The Great Valley Academy comprehensive safety plan will be reviewed, evaluated and amended (if necessary) in March of each school year.

Great Valley Academy adopted this annual comprehensive school safety plan at the regular meeting of the Board of Education as noted on the cover page. An opportunity for public comment was provided during this meeting, prior to the plan's adoption. Documentation of this meeting, which may include the meeting agenda, minutes and copies of materials provided for the plan presentation, will be filed alongside the plan and recorded in Appendix A: Documented Safety Planning Process.

An updated file containing all appropriate or required safety related plans and materials are available for public inspection in Great Valley Academy front office.

Safety Plan Appendices

Protected Information

The preceding Comprehensive School Safety Plan is a public document to be available for review in the School Office at any time during regular business hours, as mandated by Education Code 32282 (e). However, some appendices within this section may include proprietary information that shall not be released to the general public including personal contact information for staff members, detailed security procedures for campus crisis response and campus vulnerability assessment information.

As protected under the California Public Records Act (Government Code 6254 parts *c* and *aa*) and prescribed by GVA, the following items will be identified as “**Confidential**”, reviewed only in a closed session of the GVA Board of Education and withheld from public release of the Comprehensive District Safety Plan:

- Any appendices containing personnel information that the disclosure of which would constitute an unwarranted invasion of personal privacy.
(Further detail on protected information is also defined in Government Code Section 6254.3.)
- Any appendices prepared to assess School Office and/or school site vulnerabilities to terrorist or other criminal acts intended to disrupt School Office operations.

According to the procedures developed by the Department of Homeland Security and defined in DHS Management Directive 11042.1, the following items will be designated “**For Official Use Only (FOUO)**”, reviewed only in a closed session of the GVA Board and released only for official safety assurance or crisis response use:

- Any appendices containing detailed crisis response information that, if disclosed, would undermine plans or procedures designed to protect students from harm by revealing safety strategies such as but not limited to critical communications systems, crisis response facilities (i.e. command post, staging areas, etc), and supplies storage.

Appendix A: Documented Safety Planning Process

Activity Description <i>(i.e. review steps, meetings conducted, approvals, etc)</i>	Date
GVA Salida/Modesto- Site Safety Meeting/Roar training	8/26/21
GVA Salida- Site Safety campus walk	9/3/21
GVA Site Safety Meeting (Discussion of modifications to the flip chart)	10/14/21
GVA Site Safety Meeting (Discussion of modifications to the flip chart-JH specific)	11/11/21
GVA Salida/Modesto- Site Safety meeting	12/6/21
GVA Salida Site Safety meeting	1/7/22 1/14/22 1/21/22

Appendix B: Forms

Cover sheet only – insert all appropriate forms behind this page.

Included Forms:

- 1) Mandated Reporter Child Abuse Report Form

Appendix C: GVA Emergency Operations and Response

The following sections provide key information for crisis response for GVA. While this information represents the basic tools needed for an effective crisis response, GVA will continue to assess, revise and expand on the plan for continuous improvement in student safety. Additional documentation will be referenced in this Comprehensive School Safety Plan as it is developed and implemented.

***Appendix C.1: GVA Crisis Response Team with Contacts –
Confidential***

Cover sheet only – insert the GVA Crisis Response Team Roster behind this page, except in any publicly distributed versions of this document.

***Appendix C.2: GVA Emergency Response Procedures Flipchart –
(For Official Use Only)***

Cover sheet only – insert the GVA Emergency Response Procedures Flipchart in preview format (un-cut and not assembled in flipchart folder) behind this page behind this page, except in any publicly distributed versions of this document.

Appendix D: Student and Parent Handbooks

This section shall include current copies of student and parent handbooks for Great Valley Academy.

BOARD REPORT

GREAT VALLEY ACADEMY OPEN SESSION

March 29, 2022

TOPIC/AGENDA ITEM:

Executive Compensation Comparability Study

BACKGROUND:

The California Nonprofit Integrity Act of 2004 mandates that the Board of Directors ("Board") review comparable executive compensation packages for educational executives (Executive Director or equivalent) upon any of the following events: (1) initially upon hiring the educational executive; or (2) whenever the executive's term of employment is renewed or extended; or (3) whenever the executive's compensation is modified, unless the modification extends to substantially all employees in the organization (see Government Code §12586(g)).

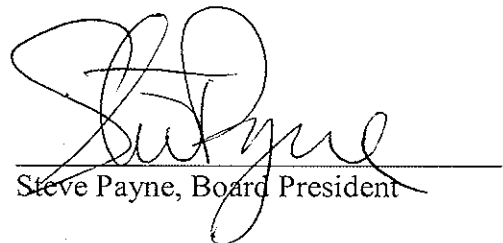
In connection with the Board's review of the Great Valley Academy ("Great Valley") Chief Executive Officer's employment agreement, the Board must meet this due diligence requirement by reviewing and adopting a comparability study.

This review is essential in order to protect Great Valley (as a corporation) and the Board from IRS sanctions for "excess benefit transactions" and to establish a rebuttable presumption that the executive's compensation is reasonable. Thus, the Board must meet the criteria set out by the IRS for conducting this review prior to any of the above changes in employment occurring. This review must occur without the participation of any individuals who possesses a conflict of interest. Under the IRS regulations, any employees under the supervision of the CEO are automatically conflicted and must recuse themselves from any participation whatsoever in any aspect of this process.

Accordingly, staff has produced a compensation comparability study (attached) for the Board's review.

BOARD PRESIDENT'S RECOMMENDATION:

Recommended approval



Steve Payne, Board President

Great Valley Academy Board

Summary of Compensation and Benefits Survey Data of Public School Leaders for Chief Executive Officer March 2022

Prior to any Board action to approve any decisions regarding executive compensation (including approval of base salary increases, incentive compensation, bonuses, etc.), the Board must first exercise due diligence (review of comparable compensation practices) to ensure compliance with IRS restrictions on excess compensation for nonprofit executives, including a charter school Chief Executive Officer. The Board's review and approval of the executive compensation must occur: initially upon hiring the executive; whenever the term of employment, if any, is renewed or extended; and whenever the officer's compensation is modified. However, separate review and approval is not required if the modification of compensation extends to substantially all employees.

In reviewing the reasonableness of compensation for nonprofit executives, the IRS considers "compensation" broadly and will look at the value of salary, as well as non-fixed compensation (incentive compensation/bonuses), and benefits. If the IRS determines compensation is not reasonable, severe consequences may result.

The following is a summary of findings subsequent to a review and comparison of a sampling of total compensation levels received by public school leaders in California. Compensation figures are from the State Controller's Office or from the Internal Revenue Service (Form 990) for the 2019 and 2020 calendar years (the most recent available). The Chief Executive Officer at Great Valley Academy oversees three charter schools serving approximately 1,814 students in Stanislaus County. Based on these facts, this study compared salary packages of similarly situated public school leaders. Of the four public school districts and two charter schools included in this survey, the average population is approximately 1,800 students. The average total compensation package (base salary plus other compensation) for comparable public-school leaders is approximately \$203,460. The average base salary is approximately \$170,883. The base salary ranges from \$144,117 to \$194,512. Salaries can range based on many factors such as experience, tenure at the school, staff size, and location of the charter school.

Hart-Ransom Union Elementary (Stanislaus County)	1,173 Students
Superintendent	
Total Compensation Package	\$198,676
Base Salary	\$189,676
Other compensation (benefits and retirement)	\$9,000
Hughson Unified (Stanislaus County)	2,058 Students
Superintendent	
Total Compensation Package	\$200,061
Base Salary	\$169,000
Other compensation (benefits and retirement)	\$31,061
Denair Unified (Stanislaus County)	1,273 Students
Superintendent	
Total Compensation Package	\$188,139
Base Salary	\$154,587
Other compensation (benefits and retirement)	\$33,552
Connecting Waters Charter School (Alameda and Stanislaus Counties)	2,226 Students
Executive Director	
Total Compensation Package	\$235,126
Base Salary	\$194,512
Other compensation (benefits and retirement)	\$40,614
Natomas Charter (Sacramento County)	1,833 Students
Executive Director	
Total Compensation Package	\$185,434
Base Salary	\$144,117
Other compensation (benefits and retirement)	\$41,317
Galt Joint Union High (Sacramento County)	2,226 Students
Superintendent	
Total Compensation Package	\$213,321
Base Salary	\$173,407
Other compensation (benefits and retirement)	\$39,914

Great Valley Academy Modesto

February 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Feb 22	Jul 21 - Feb 22	Mar 22-Jun 22	Mar 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	4,549,548	4,545,296	2,840,099	2,844,350	8,290,756	7,389,646	7,389,647
8100 · Federal Revenue	428,512	442,086	696,601	683,027	1,300,605	1,125,113	1,125,113
8300 · Other State Revenues	552,124	25,353	373,643	900,415	630,743	925,768	925,768
8600 · Other Local Revenue	286,102	261,012	-16,102	8,988	458,500	270,000	270,000
8700 · Selpa	284,137	313,642	178,903	149,398	463,040	463,040	463,040
Total Income	6,100,423	5,587,390	4,073,144	4,586,177	11,143,644	10,173,567	10,173,567
Gross Profit	6,100,423	5,587,390	4,073,144	4,586,177	11,143,644	10,173,567	10,173,567
Expense							
1000 · Certificated Salaries	2,281,175	2,326,310	1,546,117	1,500,984	3,906,294	3,827,293	3,827,292
2000 · Classified Salaries	1,331,339	1,394,016	1,020,137	957,460	2,231,245	2,351,476	2,351,476
3000 · Employee Benefits	950,349	961,490	837,329	826,188	1,705,219	1,787,678	1,787,678
4000 · Books & Supplies	609,423	679,212	353,207	283,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	826,172	914,820	538,952	450,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	50,335	58,365	25,365	78,000	75,700	75,700
7430 · All Other Financing Uses	141,374	141,374	106,005	106,005	247,379	247,379	247,379
Total Expense	6,157,168	6,467,556	4,460,112	4,149,724	11,008,402	10,617,280	10,617,280
Net Ordinary Income	-56,744	-880,167	-386,969	436,454	135,241	-443,713	-443,713

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	P1 5,770,450.89	5,779,897.16	5,929,813.23	5,675,975.89	5,226,850.93		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00		395,405.00	237,350.19	237,350.19	237,350.19	79,295.38	(0.00)	3,207,708.94
EPA Funding	8012		0.00	534,335.00				534,336.00		604,207.69			674,079.37	0.00	2,346,958.06
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	270,932.00	135,466.00	142,240.00	142,240.00	142,240.00	142,240.00	142,240.00	1,693,330.00
Selpa Prop Tax	8097							0.00	82,384.00					59,266.00	141,650.00
Federal IDEA	8181													118,486.00	118,486.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	0.00	133,889.02	34,420.00	34,420.00	34,420.00	20,000.00	13,752.76	414,821.00
Title 1, Part A	8290							0.00						117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				83,774.53	0.00		162,398.26			160,998.71	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	0.00	9,906.72	1,000.00	1,000.00	1,000.00	500.00	(2,003.83)	22,000.00
Educator Effectiveness	8550													251,726.00	251,726.00
Mandated Cost Reimb	8550							15,255.00						0.46	15,255.46
Lottery	8560							65,433.41			39,889.35			39,165.33	144,488.09
Lottery, prop 20	8561										0.00				57,617.95
In Person Inst Grant 7422	8590		0.00	0.00				198,847.65					28,808.98	28,808.98	198,848.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							94,922.00						77,664.00	172,586.00
Other	8590							201,250.00					11,629.00	(154,633.00)	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			1,567.37	0.00	833.33			48,254.41	(0.00)	5,000.00
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	1,189.00	2,208.00				(42,367.12)	0.00	52,500.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	23,026.70	30,738.26	10,000.00	9,000.00	9,000.00	441.61	0.00	210,000.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,545.00	1,401.32	5,008.64	800.00	800.00	800.00	751.57	(5,328.48)	7,500.00
Selpa	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	46,495.00	45,000.00	45,000.00	45,000.00	43,903.00	0.00	463,040.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	905,373.21	1,491,934.98	841,500.64	1,075,851.21	672,097.80	469,810.19	1,007,536.20	847,848.27	10,173,567.00
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	316,887.27	317,333.92	339,677.73	339,677.73	339,677.73	527,083.48	0.00	3,827,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	158,090.27	184,913.42	202,840.45	202,840.45	202,840.45	411,615.97	0.00	2,351,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	142,489.32	137,860.15	145,745.20	145,745.20	145,745.20	400,093.65	0.00	1,787,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	71,994.19	28,217.32	85,000.00	85,000.00	85,000.00	98,206.98	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	79,906.85	81,445.64	125,000.00	125,000.00	125,000.00	163,952.12	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	0.00	0.00	10,000.00	10,000.00	3,000.00	35,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	52,989.64	0.00	247,379.00
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	787,039.66	767,442.21	925,935.14	925,935.14	918,935.14	1,689,306.84		10,617,279.89
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,853.77	704,895.32	74,058.43	149,916.07	(253,837.34)	(449,124.95)	(681,770.65)	847,848.27	(443,712.89)
Accruals Received		73,335.00		1,100,107.07				59,845.00							1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82	(216,187.44)	(64,612.16)						
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	5,770,450.89	5,779,897.16	5,929,813.23	5,675,975.89	5,226,850.93	4,545,080.29		

Great Valley Academy Salida
February 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Feb 22	Jul 21 - Feb 22	Mar 22-Jun 22	Mar 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	4,386,806	4,761,284	2,779,733	2,405,255	7,646,195	7,166,539	7,166,539
8100 · Federal Revenue	396,757	401,775	536,946	531,928	974,454	933,703	933,703
8300 · Other State Revenues	439,828	20,274	352,338	771,892	598,889	792,166	792,166
8600 · Other Local Revenue	131,450	129,265	78,550	80,735	327,500	210,000	210,000
8700 · SELPA	272,757	299,526	155,654	128,885	428,411	428,411	428,411
Total Income	5,627,599	5,612,124	3,903,220	3,918,695	9,975,449	9,530,819	9,530,819
Gross Profit	5,627,599	5,612,124	3,903,220	3,918,695	9,975,449	9,530,819	9,530,819
Expense							
1000 · Certificated Salaries	2,105,163	2,139,721	1,545,963	1,511,405	3,663,528	3,651,126	3,651,126
2000 · Classified Salaries	1,109,674	1,133,224	762,990	739,440	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	954,240	963,360	677,145	668,026	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	523,875	594,851	330,220	259,244	967,595	854,095	854,095
5000 · Services & Other Operating Exp	830,378	865,040	452,957	418,295	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	238,960	238,960	154,952	154,952	393,912	393,912	393,912
Total Expense	5,821,604	5,994,470	3,962,913	3,790,048	9,816,985	9,784,518	9,784,518
Net Ordinary Income	-194,005	-382,346	-59,693	128,647	158,464	-253,699	-253,699

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	3,861,225.65	3,792,566.44	3,682,296.27		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	0.00	579,433.00	548,010.20	548,010.20	548,010.20	516,587.40	0.00	5,701,597.00
EPA Funding	8012	0.00	0.00	42,546.00		0.00	0.00	42,546.00		37,054.67			31,563.33	0.00	153,710.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	188,042.00	94,021.00	98,721.20	98,721.20	98,721.20	98,721.20	98,721.20	1,175,257.00
Selpa Prop Tax	8097							0.00	79,084.00					56,891.00	135,975.00
Federal IDEA	8100-8299												0.00	115,665.00	115,665.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	0.00	135,055.24	30,000.00	30,000.00	30,000.00	5,000.00	6,146.85	375,044.68
Title 1	8290				0.00								74,205.00	0.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00	2,492.92		16,660.64	61,509.00		102,384.88				143,543.81	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	0.00	10,033.27	900.00	900.00	900.00	900.00	(4,679.25)	19,000.00
Educator Effectiveness	8550							174,749.00						43,687.00	218,436.00
Mandated Cost Reimb	8550							14,644.00					0.00	0.68	14,644.68
Lottery	8560							62,886.81			41,610.97			34,205.44	138,703.22
Lottery, prop 20	8561										0.00			55,311.10	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00				137,889.30					0.00	(0.30)	137,889.00
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							79,655.00						65,172.00	144,827.00
Other	8590												0.00	58,355.00	58,355.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	1,506.37	0.00	400.00	400.00	400.00	400.00	53,475.31	5,000.00
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,350.27	17,616.59	16,666.67	16,666.67	16,666.67	16,666.67	6,542.55	200,000.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	2,187.96	964.24	800.00	800.00	800.00	2,940.37	0.00	10,000.00
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	0.00	44,633.00	35,700.92	35,700.92	35,700.92	35,700.92	12,850.33	428,411.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	809,173.09	186,135.88	1,281,842.56	781,965.71	960,840.34	870,638.53	772,809.95	731,198.98	782,684.89	745,887.73	9,530,818.93
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	301,292.22	306,874.43	321,362.06	321,362.06	321,362.06	581,877.07	0.00	3,651,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	139,526.68	166,107.14	164,592.04	164,592.04	164,592.04	269,213.52	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	132,182.99	137,202.16	139,252.38	139,252.38	139,252.38	259,388.16	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	64,846.53	25,442.47	80,632.89	80,632.89	80,632.89	88,321.38	0.00	854,094.70
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	78,111.25	98,746.68	105,759.79	105,759.79	105,759.79	135,677.33	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	65,342.11	0.00	393,912.00
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	745,829.66	764,242.87	841,469.15	841,469.15	841,469.15	1,438,505.95		9,784,517.75
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	65,783.07	(588,846.46)	430,890.31	36,136.05	196,597.47	29,169.38	(68,659.21)	(110,270.17)	(655,821.06)	745,887.73	(253,698.82)
Accruals Received		25,326.89	55,932.54	2,082,840.92	65,517.05			71,409.70							2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	3,861,225.65	3,792,566.44	3,682,296.27	3,026,475.21		

Regular Meeting of the Board of Trustees

April 25, 2022, 5:30 pm

Great Valley Academy

1209 Woodrow Ave. Suite A-4 Modesto, CA 95350

and

Via Phone from

256 Curtis Dr.

Forsyth, Missouri

1-669-900-6833

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

- i. Letter to the GVA Board of Directors from Megan Ybarra
- ii. Letter to the GVA Board of Directors from Lindsey Duran
- iii. Letter to the GVA Board of Directors from Amy Applegarth-O'Donnell

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

c. MODESTO PRINCIPAL'S REPORT

d. SALIDA PRINCIPAL'S REPORT

e. HOMESCHOOL PRINCIPAL'S REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of March 29, 2022

f. ACTION ITEMS

- a. Approval of SELPA MOU
- b. Approval of Updated 2022.2023 Modesto Academic Calendar
- c. Approval of Updated 2022.2023 Salida Academic Calendar
- d. Approval of Updated 2022.2023 Classified Holiday Schedule
- e. Approval of 2022.2023 Board Meeting Calendar
- f. Approval of Modesto Student Parent Handbook
- g. Approval of Salida Student Parent Handbook
- h. Approval of Employee Handbook

g. INFORMATION AND DISCUSSION

- a. Monthly Financials

h. FUTURE AGENDA ITEMS

- a. **NEXT REGULAR BOARD MEETING** – Monday May 23, 2022

~1209 Woodrow Ave. Suite A4 Modesto, 5:30 pm

i. CLOSED SESSION

- a. Public Employment
Title: Chief Executive Officer

j. ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.

Megan Ybarra
209-456-4832
Meg.ybarra@icloud.com

April 6, 2022

School Board
Great Valley Academy
3200 Tully Road
Modesto, CA 95350

Dear School Board Members,

I am writing today to express my continuing concerns regarding the newly established pay scales for certified employees at Great Valley Academy. First, I would like to thank our multi-campus leadership for investing time and effort into this project, as I know it was not a light undertaking.

As I finish my 7th year teaching ELA and History on the Salida campus, I cannot help but reflect on my time here at GVA and what makes our school unique. When I began, initially on the Manteca Campus, the staff had a family atmosphere and was founded on a sense of community. Indeed, having a family member attend the school when it was established opened my eyes to the excellent teachers and educational methods that put student learning and emotional safety at the forefront. Ultimately, it led me to want to join the team myself. Unfortunately, this sense of community and family seems to no longer be the case over the years, a point which saddens me to no end.

Further reflecting, the same smiling faces that I once saw are no more. Looping teams that were once stable for multiple are loops now seeing yearly turnover within the team, stripping both the team and the students of the stability GVA was founded upon. While movement is expected within any organization, I have recently seen a dramatic shift in turnover due explicitly to the compensation teachers receive at our organization. And while teachers at GVA understand that there are both perks and drawbacks at our sites, such as minimum days on Fridays, less prep time, more autonomy, more responsibilities with students, and endlessly supportive administration; the privilege of working at GVA should not come as a burden to livelihood.

Following my preliminary placement on the new scale, I will receive a baseline increase as my new placement is below my current salary. As I mentioned in the last board meeting, this is roughly \$15000 less than the lowest-paid local district and \$35000 lower than the highest. In my opinion, a baseline increase of approximately 3% -as indicated during the last board meeting- for my seven years as a teacher on campus while simultaneously earning my master's degree and becoming a doctoral candidate while the current inflation rate is 8.1%, according to the U.S. Bureau of Labor and Statistics, does not seem comparable. While I understand these numbers are contingent upon my meeting with Marisa Meeks, this initial compensation was a shock indeed.

Furthermore, this pay scale seems not to reflect the hard work and dedication that veteran teachers have invested into our great school. For years, the GVA staff has striven to better ourselves academically, not because we were compensated for it, but because we love our positions, our students, and, as the GVA pledge states, “it was the right thing to do.” However, it does not seem that those efforts are rewarded on either the initial new pay scale or the scale for the following years.

Again, I applaud and am grateful for the time and effort that went into creating this new pay scale. I love working at GVA and wish to continue at the organization for as long as possible. Likewise have every faith that our administration will continue to seek avenues to support, strengthen, and restore the sense of community and employee morale that once went without thought, as I have witnessed infinite times over my tenure with the school. However, I cannot sit idly by as we continue to lose qualified teachers that every stakeholder has put time, effort, emotional, physical, and financial investment into because our pay scale is dramatically different for those teachers who have invested in themselves. Additionally, it is hard to create meaningful, lasting relationships within the staff with higher turnover, contributing to a seemingly strained campus culture.

Quite frankly, it is exhausting for those who joined the team because of all the great things GVA has to offer to now choose whether to help onboard and train yet another new teacher or leave behind a job we genuinely love because we can’t afford to stay. It is similarly disheartening to watch our peers leave for other opportunities as GVA seemingly becomes a feeder school for other districts with higher salaries.

I respectfully encourage the board to reconsider the approved pay scale in favor of a higher rate which will assist in the retention of the already highly qualified educators invested in the “GVA Way” and the organization’s success.

I look forward to hearing from the board. Thank you for your time and consideration.

Sincerely,

A handwritten signature in black ink that reads "Megan Ybarra". The signature is fluid and cursive, with the first name "Megan" written in a larger, more prominent script than the last name "Ybarra".

Megan Ybarra, M. Ed
Doctoral Candidate, Doctor of Organizational Leadership
7th-year GVA Teacher- 7th grade ELA/History

Lindsey Duran
(209) 968-3908
LDuran333@gmail.com

April 10, 2022

School Board
Great Valley Academy
3200 Tully Road
Modesto, CA 95350

Dearest School Board Members,

My name is Lindsey Duran and I am writing today to express my concerns for the new salary scales for certificated employees recently approved by the Great Valley Academy School Board. I know that Multi campus leadership listened to what staff had to say and worked tirelessly to create something that would better serve their teachers. I appreciate the hard work and time spent in the process, but unfortunately, I feel that the attempt fell short of meeting the needs of all GVA teachers.

I am one of the founding teachers of GVA Manteca. While teaching full time, I started creating the GVA Smart Reading System (with the help and support of admin and fellow teachers). I moved with the school to our Salida campus, where I then stepped into a part time classroom teacher role, as well as creating an entirely new intervention program based on our SRS program which services 55 students. It was at this time I also began working alongside Dr. Rosenow and the GVS team. In my SRS Coordinator role, I am in charge of consistent teacher training and support, all SRS assessment organization and data, as well as SRS curriculum roll out and usage. I work as a liaison between the multi campus GVS team and our teachers, helping to serve students in need of extra support, communication and organization. Dr. Rosenow and I have worked closely through the past five years. I am lucky enough to be the recipient of many hours of training: both book work and hands-on instruction. I serve Salida students by completing vision screenings alongside Dr. Rosenow, taking notes and communicating with parents and teachers. This year I have piloted a new math intervention program as well. I have represented GVA twice as a presenter at the CSDC conference. I have remained on the leadership team nine out of the eleven years I have worked for GVA. I am also the mother of 3 children- all of whom know nothing other than GVA. I truly believe in what GVA stands for, what GVA strives for, and this is my home. My coworkers are my family. This is where I want to be.

I was taken by surprise to see that the new salary scales were a harsh shift from strictly time and merit based, to completely time and unit based. While I know the intent was to match the layout of nearby districts, we aren't them and have never operated like them. This is the beauty of being a charter! One of the things I love most about working for GVA is that my hard work and dedication has always been rewarded by administration when they see the work I'm doing. My fear is that this new scale will reward mediocrity within our classrooms. Units do not equal quality and effort. How can we alter these new scales to be more of a hybrid model?

One thing that I do like and appreciate about the new scales is that beginning teachers are now boosted to a higher rate, similar to other districts, and aligns more with what they deserve for the hard work they put in. We need these young teachers coming into GVA. They add fresh faces and ideas and have so much wisdom to share. In contrast, the upper side of the scale did not seem to progress nearly as much. We talk year after year about teacher retention. This new scale will only make GVA a stepping stone for other districts. It does not pay to stay and be loyal to GVA. Unfortunately, this upper end of the scale is going to be forcing hard-working leaders out of our school- not because they want to go, but because they quite literally couldn't afford to stay. I am currently one of these teachers. I don't want to be forced to make that decision.

I most definitely could go back to school and gain more units. However, one of the things I have loved most about working for GVA is that I can put my time and efforts into what truly drives me, and not just units for money. GVA is special. Many of the things that I would get in a university program would rarely transfer directly to GVA. I've chosen to spend my time and energy reading chapters out of Dr. Rosenow's extensive library. I've chosen to stay up late at night on my weekends creating programs that serve our students and teachers. I've chosen to spend my efforts submitting conference proposals to share the amazing things that we do at GVA with the broader charter community. I've chosen to pour my heart into designing staff training and teaching materials so that my coworkers feel more confident and supported in the classroom. I've spent endless hours researching how to better serve our students, our administration and our teachers. I have grown in so many ways through the years. Now, here I sit, 11 years later, looking at a pay scale that will not compensate me for any of this. In fact, it will put me below many of my teaching peers who may just be starting out. I have poured my heart and soul into making GVA a better place. I will get a 2% raise. And nothing beyond that for years to come unless I go back to school. This news broke my heart and left me feeling greatly underappreciated.

GVA is known for its community, its culture. A staff compiled of only a few foundational teachers, mixed with a high turnover rate for younger teachers is not going to maintain our culture. I understand that we are working at a deficit because of COVID. I understand that we don't have the ability to pay everyone what admin and multi campus leadership truly wishes they could. However, I stand before you today to ask that you seriously reconsider what has previously been approved. I stand before you tonight offering my help and support to work alongside leadership to come up with something better, something that serves all members of our family. This is my home. I want to stay. But my family deserves more. Please help us stay.

I look forward to continuing this conversation with you all.

Thank you,



Lindsey Duran
11-year GVA Teacher
SRS Coordinator
Intervention Teacher

Dear Members of the Board,

My name is Amy Applegarth-O'Donnell. I am a proud member of the GVA family. I started my teaching career with Great Valley Academy in Manteca, when the school first opened. That year, as well as every year that followed, presented its own unique challenges. However, the past two years have presented challenges beyond our imagination. As a staff we have overcome these challenges together and our families continue to have a school family to support them.

Since starting with GVA Manteca in 2011, I have taught full time in Kindergarten, First Grade, and Second Grade. In 2014 I became a mother and was fortunate enough to be able to continue my GVA career as a part-time Math Intervention teacher. GVA has always supported me both professionally and personally, and I am thankful to be a part of this community. My children attend GVA as well now and I wouldn't have it any other way.

As challenges present themselves, we often do not have power or control over the outcome. As the school year is quickly coming to a close, I find myself in a position where I feel that I may be able to contribute to a solution to helping retain quality teachers and help support our staff in the years to come. GVA has always valued high quality teachers and I have appreciated that our dedication is not overlooked and has always been reflected in our end of the year assessments, and ultimately our pay. Initially, I was excited to hear that our pay scale would be adapting to include a unit based progression. I was under the impression that this would build upon our current pay scale and would only benefit teachers, including myself, who have put so much time and energy into a performance based review. I had not considered that our new pay scale would only be based on units. Each year I have focused on professional development for the sake of growing as a professional. I was not choosing professional development opportunities solely for the sake of acquiring units or increasing my pay. I was choosing professional development opportunities based on my interests and what I felt would best benefit my students. I am extremely discouraged by the new pay scale because after 11 years with GVA, not focusing on building up units, I almost feel as though I am starting over. I am happy that new and incoming teachers are more closely being paid what they deserve, but am saddened that our veteran teachers may not feel valued, or that the pay scale does not reflect their hard work and commitment to GVA.

Ultimately, my position in Math Intervention is where I feel I am making the most difference, which is why I went into teaching in the first place. I want to stay at GVA for as long as possible. My children deserve to be here, as do I. I want quality teachers for my children as they progress through their journey at GVA. I am fearful that our pay scale will only discourage other veteran teachers from staying at GVA, additionally not motivating other teachers to stay long term. I am hopeful that the board will reconsider the current pay scale, and move towards a version that GVA teachers are deserving of. I know there are limitations, but there have to be other options to make everyone working for GVA feel more valued, appreciated, and compensated.

Sincerely,

Amy Applegarth-O'Donnell
Math Intervention Teacher
Great Valley Academy Salida
Year 11 GVA Teacher

Great Valley Academy Modesto

Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Mar. 16-April 14

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	85	76.882	90.50	79.324	88.69
1	72	67.823	93.54	68.702	89.73
2	77	71.470	91.97	76.682	90.47
3	91	86.352	94.69	88.168	90.67
4	90	82.941	91.32	85.506	90.12
5	72	68.000	94.44	70.135	90.19
6	91	86.352	93.13	86.033	89.43
7	101	95.235	93.46	96.155	91.49
8	72	68.529	94.77	70.540	92.10
Total	751	703.588	93.06	721.250	90.33

2. Key Accomplishments:

Clubs

40 Book Challenge (151 students have meet 40 books)

Live Broadcast of Assemblies- student run

Jog-A-Thon Kick Off!

Lottery for Enrollment 22-23

Eagle Project- Planter Benches

Book Bags for K-3 students

Tutoring

NWEA Testing

3. Upcoming Key Events/Activities:

Spirit Day- Neon Day!

Jog-A-Thon - May

Parents back on Campus-Walking students to class

CAASPP Testing

Great Valley Academy Salida

Charter School Monthly Summary Report

April 25, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA %
K	80	73.36	91.25	74.50	89.33
1	95	88.09	92.24	90.25	90.17
2	88	83.28	94.62	83.21	90.14
3	99	91.81	91.64	92.16	90.34
4	86	80.55	93.65	80.78	90.02
5	89	83.73	93.56	86.71	90.59
6	89	84.09	94.48	84.69	90.59
7	80	74.45	94.31	83.35	89.91
8	80	73.55	91.93	73.28	89.55
Total	786	733.27	93.07	738.93	90.12

2. Key Accomplishments:

- a. NWEA testing
- b. April 8th: Incoming kindergarten parent orientation
- c. April 11th: Parents begin walking students to class in the morning
- d. April 12th: After school tutoring begins
- e. April 13th: Jog-a-thon materials sent home
- f. April 22nd: Jog-a-thon kick-off
- g. April 25th: On-campus Science Camp begins for 6th grade

3. Upcoming Key Events/Activities:

- a. April 28th: Salida Leadership meeting
- b. April 28th: Collaborative Coffee
- c. April 30th: Spirit Day – 50s Day
- d. May 6th: Teacher in-service
- e. May 9th: CAASPP testing

- f. May 13th: Jog-a-thon water balloon day!
- g. May 13th: Incoming kinder assessment day
- h. May 17th: 8th grade Great Wolf Lodge trip
- i. May 20th: Jog-a-thon!
- j. May 26th: Salida leadership meeting
- k. May 30th: No school – Memorial Day
- l. June 1st: Kinder promotion
- m. June 1st: 8th grade graduation
- n. June 2nd: End of year party
- o. June 3rd: Last day of school

Great Valley Academy Homeschool

Charter School Monthly Summary Report

April 25, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	9	9	100	7.6	99.7
1	10	9.3	100	9.3	96.4
2	8	7.8	98	6.4	96.9
3	3	3	100	2.0	96.3
4	9	9	100	9.5	99.7
5	5	4	80	3.9	95.1
6	9	8.9	98	7.0	95.3
7	7	7	100	5.6	93.6
8	7	7	100	7.1	98.3
Total	67	65	98	58.9	97.1

2. Key Accomplishments:

- a. March 31st—Enrichment Spirit Day—College/Career Day; Physical Fitness Test
- b. April 1st—Lexia PowerUp Training
- c. April 5th—Homeschool Parent Orientation
- d. April 6th—Spring NWEA Testing begins
- e. April 7th—Enrichment: Country Reports
- f. April 14th—Assignment Work Record #8, Lockdown Drill

3. Upcoming Key Events/Activities:

- a. April 29th—Spring NWEA Testing ends
- b. May 2nd—CAASPP testing begins
- c. May 3rd—Homeschool Parent Orientation
- d. May 5th—Jog A Thon, Thursday Park Days begin
- e. May 6th—Teacher In-Service
- f. May 9th—Assignment Work Record #9

Chief Operating Officer's Report
April 25, 2022
Board Meeting



Process and Policy Updates

- ❖ Updated Student/Parent & Employee Handbooks – For Board Review
- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ Continued Refinement of Salary Projections for 22/23 – In Progress
- ❖ Continued Marketing Efforts for 22/23 Enrollment – In Progress
- ❖ Budget Planning & Analysis for 22/23 – In Progress
- ❖ Serve on Interview Teams for CEO and Homeschool Principal – In Progress
- ❖ Evaluate Additional Medical Benefit Options for Staff – In Progress
- ❖ Hiring for Campus Maintenance and Modesto KC Director – In Progress
- ❖ Preparation for Annual Audit – In Progress
- ❖ Restructuring Kids' Care Programs – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Managing COVID contact tracing – Ongoing
- ❖ Launch of SchoolWise Parent Portal – Summer 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ March 2022
 - ❑ 2,929 Users Visited (91.2% New/8.8% Returning)
 - ❑ 9,162 Page Views
 - ❑ Users Averaged 1:45 Minutes on the Site
 - ❑ 54.73% Mobile – 44.55% Desktop – 0.72% Tablet
 - ❑ Type: Organic 65.0% – Direct 27.1% – Referral 2.7% – Social 5.2%

Training

- ❖ Governor's Budget Workshop – May 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing

Chief Executive Officer's Report
April 25th, 2022
Board Meeting



State Accountability

- No data available (no testing 2020/21)
- NWEA data coming in Spring

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021 (virtual attendance)
- Governor's budget virtual conference: January 2022 + May 2022

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program-good participation
 - Intentional outreach to prior families-some response
 - Marketing collateral, delivered to area preschools
 - Enrollment meetings in progress-Lottery March 4th, 2022
- Facilitation of CEO replacement process



Homeschool

- Ongoing support of principal
 - Principal search 3.2022
 - Interviews week of 4/25
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Oversight of new staff onboarding

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved March 29, 2022



Founders Report
Great Valley Academy School Board
April 25, 2022

The Great Valley Smart staff have done a wonderful job covering for each other when someone is absent and being flexible when student group sizes change.

Vision screenings for staff and on campus students continue to be done on a weekly basis. Having the opportunity to see students in GVS 4 days per week on both campuses has been very positive. We have been able to graduate more students out of the GVS program, making room for other students in need.

We have been working closely with the home school staff and families.

Trainings have continued with the GVS staff and they continue to gain more knowledge in how to improve visual skills in GVA students.

I am pleased with the progress of the GVS staff to eventually do student evaluations and to establish training programs for students that need GVS intervention. They can also aid teachers in understanding the importance of visual skills for successful learning.

Eldon Rosenow, Founder

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
March 29, 2022

MINUTES

Members Present: Steve Payne, Vince Jamison, Twila Tosh

Members Absent: Yolanda Meraz, Susan Nisan

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Russ Howell, Mike Ruehle, Tarah Heilman, Megan Ybarra, Kellie Allen

Audience Present: Jeremy Coe

Call to Order/

Pledge of Allegiance: Mr. Payne welcomed everyone and led the Pledge of Allegiance

Communications: **COMMUNICATIONS**

Written

Communications: Mr. Payne read a letter to the Board from Megan Barajas. The letter was discussed.

Public Participation: Megan Ybarra addressed the Board about teacher salaries.

Modesto Principal

Report: Mr. Ruehle reported about the public enrollment lottery. There was a positive vibe and lots of excitement among the packed crowd. Lots of positivity! He also spoke about speaking with former students about leadership positions that they are taking in High School and said that they are flourishing!

Salida Principal

Report: Mr. Howell talked about after school clubs including Arts & Crafts, Drama, Flag Football, Volleyball, and Theatre. They are focusing on finishing strong and building momentum.

Homeschool Principal

Report: Mrs. Heilman reported on enrichment classes that are happening every Thursday. Students come to the Homeschool center and have advisory teachers. There has been drastic improvements in these classes this semester!

MINUTES

Regular Meeting of the Board

March 29, 2022

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Chief Operating

Officer's Report:

Mrs. Meeks highlighted and showed the swag bags that parents got if they referred other families to GVA. We received about 50 referrals!

Chief Executive

Officer's Report:

Ms. Silvestre Franklin reported that ADA is catching back up on both campuses with 93% weekly and 90% daily. There are no COVID numbers to report and no updates on vaccination mandates for staff. Tarah Heilman will not be returning as Principal of Homeschool next year, but she is moving to a teaching role on the Salida Campus. While we will miss her, we are thrilled that she will still be part of the GVA family! The Homeschool Principal position has been posted on Edjoin.

Founder's Report:

Dr. Rosenow thanked the administration and principals for allowing GVS to go to 4 days a week this year. It has made a huge difference and has been a big boost for our students.

Approval of Agenda/

Order of Agenda:

The motion was made by Mr. Jamison, seconded Ms. Tosh, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

March 29, 2022

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Action Items:

ACTION ITEMS

a. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Fiscal Policy Manual Revision. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

b. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Modesto 2022/2023 Academic Calendar Revision. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

c. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Salida 2022/2023 Academic Calendar Revision. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

d. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Classified Holiday Schedule. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

March 29, 2022

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e. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Classified Salary Schedule. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

f. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Certificated Teacher Salary Scale. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

g. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Certificated Administrator Salary Schedule. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

h. The motion was made by Ms. Tosh, seconded by Mr. Jamison accepting the CEO's Resignation Letter. A roll call vote was taken.,

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

i. The motion was made by Mr. Jamison, seconded by Ms. Tosh approving the Modesto Updated Safety Plan. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

March 29, 2022

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j. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the Salida Updated Safety Plan. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

k. The motion was made by Ms. Tosh, seconded by Mr. Jamison approving the CEO Compensation Comparability Study. A roll call vote was taken.

AYES: Payne, Jamison, Tosh

NOES: None

ABSENT: Meraz, Nisan

ABSTENTIONS: None

Information and Discussion:

Monthly Financials

Future Agenda Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Monday April 25, 2022- 5:30 p.m.
~ 1209 Woodrow Ave. Suite A4, Modesto CA

Adjournment:

The meeting was adjourned at 6:51 p.m.

**MEMORANDUM OF UNDERSTANDING
BETWEEN
LOCAL EDUCATIONAL AGENCIES OF THE STANISLAUS COUNTY SPECIAL
EDUCATION LOCAL PLAN AREA**

This is a memorandum of understanding ("MOU") made and entered into between the local educational agency ("LEA") members of the Stanislaus County Special Education Local Plan Area ("SELPA"), a political subdivision of the State of California, which include CBK Charter, Ceres Unified School District, Chatom Union School District, Connecting Waters Charter, Denair Unified School District, Empire Union School District, Fusion Charter School, Gratton School District, Great Valley Academy Modesto, Great Valley Academy Salida, Hart-Ransom Union School District, Hickman Community Charter District, Hughson Unified School District, Keyes Union School District, Knights Ferry School District, Newman-Crows Landing Unified School District, Oakdale Joint Unified School District, Paradise Elementary School District, Patterson Joint Unified School District, Riverbank Unified School District, Roberts Ferry School District, Salida Union School District, Shiloh School District, Stanislaus County Office of Education, Stanislaus Union School District, Sylvan Union School District, Turlock Unified School District, Valley College High School, Valley Home Joint School District, and Waterford Unified School District, that execute this MOU (hereinafter, collectively, "Parties").

The purpose of this MOU is to ensure that, when necessary, students have access to special education programs and/or services operated by an LEA member district/county office of education of service ("DOS") when appropriate program(s) and/or appropriate services are not available in the LEA member district of special education accountability/charter school ("DSEA") for the pupil. The DSEA is the District in which the pupil resides or the charter school in which the pupil is enrolled.

RECITALS

WHEREAS, the federal Individuals with Disabilities Education Improvement Act ("IDEA") and related California law entitle students with disabilities to a free appropriate public education ("FAPE") consisting of special education and related services; and

WHEREAS, the DSEA is responsible to ensure that eligible students with disabilities, who are enrolled in the DSEA, receive special education and related services in the least restrictive environment to meet their individual needs; and

WHEREAS, the DSEA is responsible to develop individualized education programs ("IEPs"), and make available a continuum of program options, including related services, to eligible students with disabilities who are enrolled in the DSEA; and

WHEREAS, the DOS operates special education programs and services that are available for access by a DSEA that is a party to this Agreement to provide DSEA students with DOS placement and services in accordance with that student's IEP and this MOU; and

THEREFORE, in consideration of the mutual covenants, terms, and conditions, it is understood and agreed by and between the Parties as follows:

AGREEMENT

I. DESCRIPTION OF PLACEMENTS AND SERVICES

The DOS shall provide the placements and/or services to DSEA students, consistent with a student's IEP and this MOU, and in exchange for the Fee for Service set forth in Section III of this MOU.

- A. Placement. The DOS shall provide placement (including special education and general education) for the DSEA student in accordance with the student's IEP:
 - 1. The DOS shall provide the placement, including qualified personnel, in accordance with all applicable federal and state statutes and regulations.
 - 2. The DOS shall be the properly assigned regionalized provider for the associated classroom or service. See SELPA policy on Regional Programs and Services/Geographical Zones for further information.
 - 3. DOS personnel shall attend all IEP team meetings in accordance with Section I.D. for the DSEA student for whom the DOS is providing the placement.
 - 4. A DSEA representative may do on-site visits of the placement provided by giving the DOS a minimum of two (2) school days advance notice.
 - 5. The DSEA and DOS will confer to determine how the DSEA student will be provided with the other rights and benefits available to other DOS students (e.g., access to after-school programs, counseling, tutoring, participation in extracurricular activities).
- B. Related Services: The DOS shall provide the related service(s) to the DSEA student in accordance with the student's IEP:
 - 1. The DOS shall provide the related service(s), including qualified personnel, in accordance with all applicable federal and state statutes and regulations.
 - 2. DOS personnel shall attend all IEP team meetings in accordance with Section I.D. for the DSEA student for whom the DOS is providing the related service(s) unless the DSEA indicates that the DOS personnel are not necessary members of the IEP team for a specific IEP team meeting.

C. Prior to Placement and/or Services:

1. Prior to placement and/or services by the DSEA of a student into the DOS placement and/or services, the DSEA must conduct all necessary assessments to determine the DSEA's student needs. Further, the DSEA must convene an IEP meeting to identify potential placement and service options, and document the need for placement and/or services to be provided outside of the DSEA. The DSEA must either:
 - i. determine the availability and appropriateness of placement and/or services in a member LEA DOS by contacting the special education administrator for the DOS, coordinate observations and an IEP meeting with the DOS, and arrange for and provide/fund transportation for the student to attend the placement and/or service within the DOS; or
 - ii. invite the member LEA DOS to the IEP meeting noted in Section I.C.2, above, as part of the discussion of all placement options considered by the IEP team. If requested by the DOS, prior to beginning the placement and/or service in the DOS, the DSEA must coordinate observations and IEP meetings with the DOS. The DSEA must arrange for and provide/fund transportation for the student to attend a placement and/or service within the DOS.
2. As an exception to the process identified in I.C.1, when a student transfers into the DSEA during the school year pursuant to Education Code section 56325, the DSEA shall consult with the DOS prior to placement and/or services as to the appropriateness of the DSEA student in the DOS placement.

D. IEPs and IEP Team Meetings: The DOS is responsible for scheduling and issuing a Notice of Meeting for all IEP team meetings, and for ensuring that the IEP team has all legally-mandated members. The DSEA is responsible for making the offer of FAPE.

1. The DSEA and the DOS shall cooperate in scheduling IEP team meeting dates, times, and locations, and in determining which personnel are necessary members of an IEP team. A DSEA representative shall attend every IEP meeting for a DSEA student attending a DOS placement and/or related service.
2. Where the DOS personnel are required members of an IEP team, but need to be excused in whole or in part, the DOS agrees to comply with federal and state statutes and regulations pertaining to IEP team meeting excusals, including providing the parent/guardian and the

IEP team with written input into the development of the IEP prior to the IEP team meeting when required by law.

3. The DOS shall assist the DSEA in developing and implementing the IEP by doing the following:
 - i. Tracking referral, assessment, and IEP timelines;
 - ii. Conducting assessments;
 - iii. Drafting IEPs;
 - iv. Developing its offer of FAPE;
 - v. Ensuring that progress reports from DOS service providers are provided to parents in accordance with the student's IEP; and
 - vi. Investigating and responding to compliance complaints, special education audits, and other investigations or complaints related to the placements and/or services provided by the DOS.
4. DOS personnel will provide input and make recommendations during IEP team meetings regarding the student's present levels, goals, placement, related services, accommodations, modifications, and supports needed to provide the student with a FAPE.
5. The IEP team shall have responsibility for determining the appropriate placement and related services for the student in accordance with applicable federal and state statutes and regulations.
6. DOS personnel shall sign as participants in the IEP team meeting on the IEP signature page.
7. The DOS may hold an IEP meeting based on concerns regarding a student's performance and/or the need to discuss a possible change in the student's IEP. The DOS shall invite a representative from the DSEA to attend any IEP meeting held for a DSEA student.
8. The DOS shall notify the DSEA in writing of any significant parent or guardian concerns regarding a student for whom the DOS is providing a placement and/or service within two (2) business days of receipt. Significant parent or guardian concerns are those in which an administrator is involved.

- E. Present Levels and Progress Reports: The DOS agrees to provide to the student's parents/guardians and to the DSEA present levels of academic achievement and functional performance and progress on goals for students being served by the DOS pursuant to the IEP. The DOS shall comply with all applicable federal and state statutes and regulations in developing the present levels of academic achievement and functional performance and the progress on goals.

II. NOTICES TO PARTIES

- A. All notices required or authorized by this MOU shall be in writing and shall be deemed to have been served if delivered personally or deposited in the United States Mail, postage prepaid for first class mail, and properly addressed to the individual and address information determined by each LEA. Electronic mail or facsimile are also deemed acceptable forms of written notice. Changes in contact person or address information shall be made by notice, in writing, to the other party.
- B. The Parties shall notify each other as soon as possible if any party becomes aware of any circumstances that prevent a student from receiving services under this MOU (e.g. hospitalization, admission to juvenile hall, placement in foster care, etc.).
- C. The Parties shall notify each other of a change in a student's residence within five (5) business days of the party's knowledge of that change.

III. FEE FOR SERVICE

- A. The Parties agree that the placements and/or services provided by the DOS under this MOU will first be funded, if applicable, from Medi-Cal or other non-educational local, state, and federal funding sources subject to parent consent, or as otherwise available by law. Once the Medi-Cal or other non-educational local, state, and federal funding sources have been exhausted or determined inapplicable, the net costs of the services provided in this MOU shall be billed to the DSEA based on the actual net cost for the DOS to serve the student.
- B. Billing rates: The applicable billing rates for placements and/or services provided by a DOS under this MOU are listed in Exhibit A and are hereby incorporated into this MOU. Changes to billing rates shall only be made on November 1st, February 1st, and April 15th of the academic year at issue, and only if the DOS's cost to run the specific placement or provide the service for the student changes.
- C. Billing To and Payment By DSEA: Billing shall happen through the SELPA office and accounting system and the payments automatically deducted according to the Fee For Service (FFS) Transfer Authorization Schedule. The FFS Transfer Authorization Schedule shall be established by the

SELPA office annually at the beginning of each school year. (See SELPA Policy on Administrative Regulations Revenue & Expenditures; 2020-2021 Fee for Service Transfer Authorization Schedule; Policy: Fee for Service and Cost Parameters; Fee for Service Descriptors).

1. The DOS will ensure the SELPA provides the following documentation with each monthly billing statement, that will allow the DSEA to reference the placement and/or services provided to a DSEA student:
 - i. Name of each student served;
 - ii. Date of birth for each student served;
 - iii. Date(s) of placement and/or service;
 - iv. Location(s) where placement and/or services were provided;
 - v. Type(s) of placement and/or services provided; and
 - vi. Number of days enrolled.
2. The final determination of cost for the school year will be calculated pursuant to the true-up process, which is explained in the SELPA Policy, Administrative Regulation: Revenue and Expenditures.

D. Fee for Service for Placement and/or Services Provided:

1. The DOS shall be entitled to compensation under this MOU only for the cost(s) to run the placement and/or services for the student identified in their IEP.
2. However, the DOS shall not be entitled to compensation for placements and/or services provided to an individual student per the terms of this MOU if:
 - i. The DOS provided placement and/or services to an individual student that was not listed specifically within the student's IEP as a placement or service to be provided by the DOS at the time the DOS provided the placement and/or services; or
 - ii. The DOS failed to provide the placement and/or services in accordance with this MOU and applicable federal and state statutes and regulations.

- E. The DSEA agrees to pay the DOS for the cost of the actual placements and/or services delivered under this MOU to which the DOS is entitled to

compensation under Section III.C. In the event the DSEA contests a portion of the billing statement, the DSEA and the DOS shall cooperate with the SELPA office to resolve the contested portion of the billing, but the remainder of the billing statement shall continue to be due and payable.

IV. PRIVACY AND RECORDS

The Parties acknowledge and agree to act to ensure the protections afforded to student records under the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. section 1232g; and under provisions of state law relating to privacy. The Parties shall ensure that all activities undertaken under this MOU will conform to the requirements of these laws, when applicable. When requested by the DSEA, the DOS will provide, within five (5) calendar days, documentation related to services provided under the terms of this MOU to the extent permitted by law.

V. INDEMNITY

- A. The DOS shall indemnify and hold harmless the DSEA (and its governing board, officers, administrators, agents, employees, independent contractors, subcontractors, consultants, and other representatives) from and against any and all liabilities, penalties, fines, claims, demands, costs, losses, damages, or expenses, including reasonable attorneys' fees and costs, and including, but not limited to, consequential damages, loss of use, extra expense, cost of facilities, death, sickness, or injury to any person(s) or damage to any property, from any cause whatsoever arising from or connected with its service hereunder, that arise out of or result from, in whole or in part, the negligent, wrongful or willful acts or omissions by the DOS, its employees, agents, subcontractors, independent contractors, consultants, or other representatives, provided that this shall not apply to injuries or damage to the extent that the DSEA has been found in a court of competent jurisdiction to be liable by reason of its own negligence or willful misconduct.
- B. The Parties agree that failure by DOS to:
 - 1. Properly provide special education or related services listed in a student's IEP, including maintaining and providing proper documentation of such placement and/or services; or
 - 2. Attend student's IEP where the DOS has provided student with special education or related services, or
 - 3. Comply with IDEA and California special education law,shall constitute negligence, willful misconduct, and/or wrongful or willful acts of omission for purposes of Section V.A.

C. The DSEA shall indemnify and hold harmless the DOS (and its governing board, officers, administrators, agents, employees, independent contractors, subcontractors, consultants, and other representatives) from and against any and all liabilities, penalties, fines, claims, demands, costs, losses, damages, or expenses, including reasonable attorneys' fees and costs, and including, but not limited to, consequential damages, loss of use, extra expense, cost of facilities, death, sickness, or injury to any person(s) or damage to any property, from any cause whatsoever arising from or connected with its service hereunder, that arise out of or result from, in whole or in part, the negligent, wrongful or willful acts or omissions by the DSEA, its employees, agents, subcontractors, independent contractors, consultants, or other representatives, provided that this shall not apply to injuries or damages to the extent that the DOS has been found in a court of competent jurisdiction to be liable by reason of its own negligence or willful misconduct.

D. The Parties agree that failure by DSEA to:

1. Offer FAPE to the DSEA student; or
2. Comply with IDEA and California special education law,

shall constitute negligence, willful misconduct, and/or wrongful or willful acts of omission for purposes of Section V.C.

E. In the event any action or proceeding is brought against any Party by reason of any claim or demand discussed in this section, upon notice, the indemnifying Party shall defend the action or proceeding, at the indemnifying Party's expense, through counsel reasonably satisfactory to the other Party. The obligation to indemnify set forth in this section shall include reasonable attorneys' fees and investigation costs and all other reasonable costs, expenses, and liabilities from the first notice that any claim or demand is made.

F. The indemnifying Party's obligations under this section shall apply regardless of whether the other Party (or any of its officers, employees, trustees, or agents) is actively or passively negligent, but shall not apply to any liabilities, penalties, fines, claims, demands, costs, losses, damages, or expenses, including reasonable attorneys' fees and costs determined by an arbitrator or court of competent jurisdiction to be caused by the sole active negligence or willful misconduct of the other Party, its officers, employees, trustees, or agents.

G. This indemnity provision shall survive the term of this MOU and is in addition to any other rights or remedies that the Parties may have under law and this MOU.

VI. DUE PROCESS HEARINGS AND OTHER LEGAL PROCEEDINGS

- A. For purposes of Section VI, "other legal proceedings" include, but are not limited to, any complaint, administrative, or civil action or related appeals, filed with any civil or administrative adjudicative agency or court, including, but not limited to, the Office of Administrative Hearings ("OAH"), California Department of Education ("CDE"), Office for Civil Rights ("OCR"), or a court of competent jurisdiction.
- B. The DOS agrees to continue providing services under the terms of this MOU to any student where required as "stay put."
 - 1. The DOS and DSEA shall cooperate in administrative or other legal proceedings involving special education students receiving services from the DOS pursuant to this MOU, including, but not limited to, complaints, resolution sessions, mediations, hearings, and appeals. Cooperation between the DOS and DSEA shall include, but not be limited to, making witnesses available for interview and attendance at hearing, as necessary; providing copies of all relevant documentation related to special education and related services provided under the terms of this MOU; and, collaborating in the drafting and execution of settlement agreements regarding DSEA students in DOS placement and/or services.

VII. INTEGRATION

This MOU represents the entire understanding of the Parties as to those matters contained herein, and supersedes and cancels any prior oral or written understanding, promises or representations with respect to those matters covered hereunder. This MOU may not be modified or altered except in writing, specifying the changes and effective date(s), signed by all Parties hereto. This is an integrated agreement.

VIII. LAWS AND VENUE

This MOU shall be interpreted in accordance with the laws of the state of California. If any action is brought to interpret or enforce any term of this MOU, the action shall be brought in a state or federal court situated in the County of Stanislaus, state of California, unless otherwise specifically provided for under California law.

IX. THIRD PARTY RIGHTS

Nothing in this MOU shall be construed to give any rights or benefits to anyone other than the Parties.

X. SEVERABILITY

The unenforceability, invalidity or illegality of any provision(s) of this MOU shall not render the other provisions unenforceable, invalid, or illegal.

XI. TERM

- A. This MOU shall cover the two-year period of July 1, 2022, through June 30, 2024. This MOU shall terminate as of the close of business on June 30, 2024.
- B. This MOU will be effective among any SELPA LEA members that execute this MOU.

XII. INTERAGENCY DISPUTE RESOLUTION

In the event that any Party disputes the meaning of the terms of this MOU, the disagreeing Parties shall attempt to resolve the dispute in good faith first through a joint meeting of their representatives. If an agreement cannot be reached through the joint meeting, then the Parties agree to attempt to resolve the disagreement under the dispute resolution procedures developed pursuant to the SELPA Local Plan and the policies therein.

XIII. INDEPENDENT CONTRACTOR

In the performance of this MOU, the Parties are at all times, acting and performing as independent contractors, and this MOU creates no relationship of employer and employee as between the Parties, including their respective agents and employees. The Parties agree that none of the Parties, nor their agents and employees, have any rights, entitlement or claim against any other party for any type of employment benefits or workers' compensation or other programs afforded to the other Party's employees. Each Party shall be responsible for its applicable state and federal income, payroll and taxes, and agrees to provide any workers' compensation coverage as required by California State laws.

XIV. INSURANCE

- A. It is agreed that the Parties shall each maintain at all times during the performance of this MOU, insurance coverage or programs of self-insurance in the amounts of not less than:
 - 1. One Million Dollars (\$1,000,000) per occurrence, and Two Million Dollars (\$2,000,000) aggregate for General Liability;
 - 2. One Million Dollars (\$1,000,000) per occurrence, and One Million Dollars (\$1,000,000) for Automobile Liability;
 - 3. Two Million Dollars (\$2,000,000) aggregate for Professional Liability coverage;
 - 4. Workers' Compensation Insurance shall be maintained as required by any applicable law or regulation;

5. Employer's Liability Insurance shall be maintained in an amount of not less than One Million Dollars (\$1,000,000),
- B. Subrogation: The Parties hereby waive, and will cause their respective insurers to waive, their respective rights of recovery against one another for workers' compensation claims.

XV. SUBCONTRACTING

It is agreed by the DSEA that the DOS may subcontract with other organizations to provide the services in this MOU. Such subcontracts will be between the DOS and the subcontractors, and the DOS shall be responsible to manage the services of its subcontractors to fulfill the responsibilities of this MOU. The DSEA may subcontract with other organizations to provide the services in the MOU with the DOS's collaboration and agreement.

XVI. DEFAULTS

The Parties to this MOU shall be responsible for assuring the provisions included in this MOU are implemented. Notwithstanding any other terms and conditions herein, in the event that a Party is materially unable to perform any of its obligations in this MOU because of a Force Majeure event beyond the Party's control, then such Party shall, upon written notice to the other impacted Party or Parties, be relieved from its performance of such obligations to the extent, and for the duration, that such performance is prevented by such Force Majeure event; provided that such Party claiming Force Majeure shall at all times use its best efforts to resume such performance. Force Majeure events shall mean acts of a public enemy; fires; floods; explosions; incidences of disease or illness that reach epidemic, endemic, or pandemic proportions; quarantine restrictions; freight embargos; strikes; boycotts; obstructive actions by labor organizations; demonstrations; riots; earthquakes; tidal waves; landslides; tsunamis; tornados; named storms; and other acts of God not attributable to the fault, negligence, or willful misconduct of the Party claiming Force Majeure, is outside of the reasonable control of such Party, and could not have been prevented through the exercise of due care and reasonable diligence by the Party claiming Force Majeure. The Party claiming Force Majeure shall use reasonable diligence to correct the cause of the delay, if correctable, and if the condition that caused the delay is corrected, the Party claiming Force Majeure shall immediately give the other impacted Party or Parties written notice, thereof, and shall resume performance of the terms of this MOU.

XVII. SIGNATURES IN COUNTERPARTS

This MOU may be signed in counterparts such that signatures appear on separate signature pages. A copy or original of this document with all signature pages appended together shall be deemed a fully executed MOU. The Parties agree that faxed and scanned signatures are binding for this MOU.

IN WITNESS WHEREOF, the Parties hereto have caused their duly authorized representatives to execute this MOU as of the dates below.

SELPA MEMBERS:

Jeff Albritton, Assistant Superintendent
CBK Charter

DATE

Dr. Denise Wickham, Superintendent
Ceres Unified School District

DATE

Cherise Olvera, Superintendent
Chatom Union School District

DATE

Sherri Nelson, Executive Director
Connecting Waters Charter

DATE

Dr. Terry Metzger, Superintendent
Denair Unified School District

DATE

David Garcia, Superintendent
Empire Union School District

DATE

Susan Nisan, Principal
Fusion Charter School

DATE

Wendy Williams, Superintendent
Gratton School District

DATE

Leah Silvestre, Chief Executive Officer
Great Valley Academy Modesto

DATE

Leah Silvestre, Chief Executive Officer
Great Valley Academy Salida

DATE

Matthew Shipley, Superintendent
Hart-Ransom Union School District

DATE

Paul Gardner, Superintendent
Hickman Community Charter District

DATE

Brenda Smith, Superintendent
Hughson Unified School District

DATE

Dr. Helio Brasil, Superintendent
Keyes Union School District

DATE

Dr. Janet Skulina, Superintendent
Knights Ferry School District

DATE

Shawn Posey, Superintendent
Newman-Crows Landing Unified School District

DATE

Dr. David Kline, Superintendent
Oakdale Joint Unified School District

DATE

Heath Thomason, Superintendent
Paradise Elementary School District

DATE

Dr. Phil Alfano, Superintendent
Patterson Joint Unified School District

DATE

Christine Facella, Superintendent
Riverbank Unified School District

DATE

Bob Loretelli, Superintendent
Roberts Ferry School District

DATE

Twila Tosh, Superintendent
Salida Union School District

DATE

Seth Ehrler, Superintendent
Shiloh School District

DATE

Scott Kuykendall, Superintendent
Stanislaus County Office of Education

DATE

Shannon Sanford, Superintendent
Stanislaus Union School District

DATE

Eric Fredrickson, Superintendent
Sylvan Union School District

DATE

Dana Trevethan, Superintendent
Turlock Unified School District

DATE

Jeff Albritton, Assistant Superintendent
Valley College High School

DATE

Bill Slikker, Superintendent
Valley Home Joint School District

DATE

Dr. Don Davis, Superintendent
Waterford Unified School District

DATE

Great Valley Academy Modesto 2022-2023 Academic Calendar

1-8 Staff In-Service- No School

9 1st Day of School

22-31 NWEA Testing

AUGUST 2022						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

17 days

FEBRUARY 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

18 days

End of Trimester = Feb. 24

1-3 NWEA Testing

13 Staff In-Service- No School

20 Presidents' Day- No School

1-15 NWEA Testing

5 Labor Day- No School

16 Staff In-Service- No School

SEPTEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

20 days

MARCH 2023						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

18 days

15 Character Report Cards

15 Academic Report Cards

15-17 Parent Teacher Conferences

20-24 Spring Break- No School

5 Character Report Cards

5-7 Parent/Teacher Conferences

10-14 Fall Break – No School

OCTOBER 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

16 days

APRIL 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

18 days

7-10 Spring Holiday- No School

11-28 SBAC Testing

11 Veterans Day- No School

16 Academic Report Cards

23-25 Thanksgiving Break- No School

NOVEMBER 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

18 days

End of Trimester- Nov. 4

MAY 2023						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

21 days

5 Staff In-Service- No School

2-5 Smarter Balanced

29 Memorial Day- No School

31 Academic Report Cards

31 Character Report Cards

19-30 Winter Break- No School

DECEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

12 days

JUNE 2023						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

2 days

End of Trimester = June 2

2 Last Day of School

5 Staff In-Service Day

2 Winter Break- No School

10-31 NWEA Winter Testing

16 M.L King Day- No School

JANUARY 2023						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

JULY 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Teacher In-Service Days

180 School Days

Great Valley Academy Salida 2022-2023 Academic Calendar

1-8 Staff In-Service- No School 9

1st Day of School

AUGUST 2022						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

17 days

FEBRUARY 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

18 days

End of Trimester = Feb. 24

8-10 Parent/Teacher Conferences

13 Staff In-Service- No School

20 Presidents' Day- No School

5 Labor Day- No School

16 Staff In-Service- No School

SEPTEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

20 days

MARCH 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

18 days

20-24 Spring Break- No School

5-7 Parent/Teacher Conferences

10-14 Fall Break – No School

OCTOBER 2022						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

16 days

APRIL 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

18 days

7-10 Spring Holiday- No School

11 Veterans Day- No School

23-25 Thanksgiving Break- No School

NOVEMBER 2022						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

18 days

End of Trimester = Nov. 4

MAY 2023						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

21 days

5 Staff In-Service- No School

29 Memorial Day- No School

19-30 Winter Break- No School

DECEMBER 2022						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

12 days

JUNE 2023						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

2 Last Day of School

5 Staff In-Service Day

2 Winter Break- No School

16 M.L King Day- No School

JANUARY 2023						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

20 days

JULY 2023						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Pending Board Approval

NO SCHOOL

MINIMUM DAY

10 Staff In-Service Days

180 School Days



Holiday Schedule Classified Staff 2022-2023 School Year

Monday, July 4, 2022	Independence Day
Monday, September 5, 2022	Labor Day
Friday, November 11, 2022	Veteran's Day
Thursday & Friday, November 24 & 25, 2022	Thanksgiving Holidays
Friday & Monday, December 23 & 26, 2022	Winter Holidays
Friday, December 30, 2022 & Monday, January 2, 2023	New Year's Holidays
Monday, January 16, 2023	Martin Luther King Jr. Day
Monday, February 20, 2023	President's Day
Friday & Monday, April 7 & 10, 2023	Spring Holidays
Monday, May 29, 2023	Memorial Day

Pending Board Approval



Board Meeting Dates 2022.2023

August 1, 2022 – 5:30 pm IF NEEDED

August 29, 2022 - 5:30 pm

September 26, 2022 - 5:30 pm

October 24, 2022- 5:30 pm

November 28, 2022- 5:30 pm

January 30, 2023- 5:30 pm

February 27, 2023- 5:30 pm

March 27, 2023- 5:30 pm

April 24, 2023- 5:30 pm

May 22, 2023- 5:30 pm

June 26, 2023- 5:30 pm

Meetings will be held at 1209 Woodrow Ave., Suite A4 Modesto CA 95350



2022-23 Student/Parent Handbook

Great Valley Academy (Modesto Campus)
3200 Tully Road
Modesto, CA 95350
Phone: 209-576-2283

www.greatvalleyacademy.com

Board Approval – Pending

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Mission and Core Philosophy

Vision

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

Mission

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Philosophy

At Great Valley Academy, we believe:

- Every child is unique and can learn like a gifted learner – visually.
- Students deserve the opportunity to have instruction delivered in a way that is relevant and meaningful.
- School should be a non-threatening environment that emphasizes relationships.
- Character education should be taught, modeled, and assessed.
- Highly-trained, motivated teachers are essential.
- Parental involvement and support is an essential element of a quality educational experience.

Great Valley Academy's inquiry-based curriculum will help students become self-motivated, competent, lifelong learners who are critical thinkers; demonstrating confidence and creativity. We believe that all students can achieve high standards even though they may enter Great Valley Academy with different strengths, abilities, and life experiences.

5 Pillars

1. Great Valley Smart (GVS)

GVA trains the brain, unlocking gifted learning through the utilization of visual strategies and purposeful movement.

2. Character Development

GVA equips students to become caring and responsible citizens through choice theory, character reflection, and assessment.

3. Climate: Safe, Loved, Learning

GVA nurtures a community where all are safe, loved, and learning.

4. Mastery Learning

GVA empowers students to influence the pace and content of their academic experience through the demonstration of mastery.

5. Highly Qualified and Dedicated Staff

GVA develops a highly-dedicated team through extensive and interactive hiring practice and continuous professional growth.

2022 - 2023 Student Calendar – Subject to Change

August	1-8	Staff Training Days
August	9	First Day of School
September	5	Labor Day – No School
September	TBD	Kindergarten Extension Begins
September	16	Teacher In-Service – No School
October	10-14	Fall Break – No School
November	11	Veterans Day – No School
November	23-25	Thanksgiving Vacation – No School
December	19-30	Winter Vacation – No School
January	2	Winter Vacation – No School
January	16	Martin Luther King's Birthday – No School
February	13	Teacher In-Service – No School
February	20	Presidents' Day – No School
March	20-24	Spring Break – No School
April	7-10	Spring Holiday – No School
May	5	Teacher In-Service – No School
May	29	Memorial Day – No School
June	2	Last Day of School

School Hours

Monday – Thursday (Morning Start Times)

<u>Grade Level</u>	<u>Start Time</u>
Kindergarten AM	8:00am
1 st – 8 th	8:00am
Kindergarten PM	11:40am

Monday – Thursday (Ending Times)

<u>Grade Level</u>	<u>End Time</u>
Kindergarten AM	11:20am
Kindergarten PM, 1 st – 3 rd	3:00pm
4 th – 8 th	3:00pm

Friday (Morning Start and Ending Times)

<u>Grade Level</u>	<u>Start and End Times</u>
Kindergarten	8:00am – 11:40am
1 st – 3 rd	8:00am – 11:40am
4 th – 8 th	8:00am – 11:40am

Student Wellness

We are committed to the optimal development for every student. The school wellness policy outlines GVA's approach to ensuring supportive environments and opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. The GVA wellness policy can be found in the main campus office or on the home page of our website at www.greatvalleyacademy.com.

Breakfast

Breakfast is served during morning recess. GVA contracts with Revolution Foods for healthy options for your child. For more information, go to www.greatvalleyacademy.com.

Lunch

Students will eat in their classroom, family-style, with their teachers. Teachers use this time to chat with students, teach good table manners, conduct conferences with students, as well as eat.

Students may either bring a lunch from home, or they may receive a lunch through our lunch program. Students will not have access to a microwave. GVA contracts with Revolution Foods for healthy options for your child. For more information, go to www.greatvalleyacademy.com.

Students who forget their lunch may call home to have a lunch brought to the office. The office is not responsible for lunches not picked up by the student. Meal delivery services (i.e. Grub Hub, Door Dash) should not be used to bring your student lunch. GVA desires that all students receive a lunch, if you are unable to deliver a lunch, please make sure your student has checked with Food Services regarding the availability of a lunch.

Free and Reduced-price qualifying students must apply each year and receive notification from the Great Valley Academy Food Services program. Information can be found at www.greatvalleyacademy.com.

Snacks

Students in grades 1st-8th will have a snack in the morning and afternoon. We ask **parents to provide** their child with **two healthy snacks each day**. AM/PM Kindergarten students need to also have a snack. If you have a PM Kindergarten please make sure they have lunch before coming to school.

Water Bottles

We encourage students to drink water throughout the day by keeping reusable water bottles with them at all times while they are in school. GVA has refilling stations on campus to reduce plastic waste.

Uniforms

Students and staff at Great Valley Academy will wear uniforms daily. We have chosen uniforms because they:

- Allow students and staff to focus on learning.
- Improve the safety and security of the school.
- Improve behavior and discipline in the school.
- Help develop a sense of unity.
- Ensure that appropriate clothing will be worn to school.
- Emphasize the individuality of each child.

GVA Administration reserves the right to address, at their discretion, uniform issues that present themselves as a distraction to the students, the educational process or prevent student safety.

Required Uniform - K-6 Grades

Bottoms

- Black or khaki color straight, jean/denim or cargo pants/shorts.
- Black or khaki color capris, skirts, skorts and jumpers. Must be no shorter than the end of a students' fingertips when their arms are down at their sides – both front and back.
- Bottoms must be plain material without designs or patterns. No decorative holes, rips or tears. Yoga, sweat pant, athletic (workout) styles are not allowed.
- Leggings/tights may only be worn under skirts, skorts, shorts and jumpers and must be solid white, black, grey or navy.
- All bottoms must allow non-restrictive movement.
- All bottoms must be worn at the waist and not excessively baggy; at no time should undergarments show.

Tops

- Solid dark green, collared polo shirt with a white embroidered Great Valley Academy logo on the left side chest.
- Solid white, collared button-up dress shirt or blouse with green or maroon embroidered Great Valley Academy logo on the left side chest.
- All tops must have either short or long sleeves.
- All tops must allow non-restrictive movement.
- Undershirts that extend past the uniform shirt (sleeves and bottom of shirt) must be solid white, black, navy, grey, or dark green.
- Solid navy blue sweatshirts, sweaters and jackets with a white embroidered Great Valley Academy logo on the left side chest are allowed to be worn inside.
- Great Valley Academy sponsored sweatshirts and jackets may be worn inside.
- All non-navy and non-sponsored sweatshirts, sweaters and jackets may be worn outside but must be removed when inside.

Required Uniform - 7th & 8th Grades

Bottoms

- Black or khaki color straight, jean/denim or cargo pants/shorts.
- Black or khaki color capris, skirts, skorts and jumpers. Must be no shorter than the end of a students' fingertips when their arms are down at their sides – both front and back.
- Bottoms must be plain material without designs or patterns. No decorative holes, rips or tears. Yoga, sweat pant, athletic (workout) styles are not allowed.
- Leggings/tights may only be worn under uniform skirts, skorts, shorts and jumpers must be solid white, black, grey or navy.
- All bottoms must allow non-restrictive movement.
- All bottoms must be worn at the waist and not excessively baggy; at no time should undergarments show.

Tops

- Solid maroon, collared polo shirt with a white embroidered Great Valley Academy logo on the left side chest.
- Solid white, collared button-up dress shirt or blouse with maroon or green embroidered Great Valley Academy logo on the left side chest.
- All tops must have either short or long sleeves.
- All tops must allow non-restrictive movement.
- Undershirts that extend past the uniform shirt (sleeves and bottom of shirt) must be solid white, black, navy, grey, or maroon.
- Solid navy blue sweatshirts, sweaters and jackets with a white embroidered Great Valley Academy logo on the left side chest are allowed to be worn inside.

- Great Valley Academy spirit sweatshirts and jackets may be worn inside.
- All non-navy and non-spirit sweatshirts, sweaters and jackets may be worn outside but must be removed when inside.

Required Uniform – All Students

Friday Spirit Days

- Every Friday students may wear school spirit shirts that include but are not limited to jog-a-thon, athletics, Kids Care, grade level designs, performing arts, music, etc.
- Periodically each campus will announce dress-up or special spirit days. Details for these days will be outlined in campus newsletters and/or announcements.

Shoes

- Athletic shoes must be worn at all times. Students will be involved in fitness/movement activities throughout the day and thus shoes must be well fitting and secured at all times.
- No sandals, flip-flops, open-toed shoes, wedged tennis shoes, shoes with heels or wheels, slip-on shoes (i.e. Vans, Toms) or boots. Rain boots are permitted on rainy days only but athletic shoes must be brought to put on once inside.



Head Coverings

- Hats, beanies and other head coverings may be worn outside only and in a practical manner as to block eyes from the sun or to keep warm.
- Head coverings worn for religious reasons are allowed.

Appearance/Accessories/Hair

Please keep in mind the intent of the uniform policy is for students to have a simple, professional and unified appearance – both in clothing and personal appearance. The focus at GVA is on learning. Our ultimate guide for clothing and appearance is to be sure it does not distract from learning. We are preparing students for professional careers and professional appearance is important.

- Excessive and/or extreme jewelry, such as chains or spikes, are not allowed.
- Ear and facial piercings are allowed to the extent that they do not cause a distraction or create a safety concern for the student or others. Body piercings may not be visible.
- Extreme and/or excessive make-up is not allowed.
- Visible tattoos are not allowed.
- Great Valley Academy does not have a hair length requirement but it is important that students are able to make eye contact, so hair must not cover the eyes.
- Clothing should be free of rips and tears or reasonably mended.
- Clothing should be kept clean without excessive stains and discoloration.

Purchasing Uniforms

You may purchase uniforms directly from Great Valley Academy. Visit the online store at www.gvauniformstore.com.

In addition to Great Valley Academy, uniform apparel may be purchased from major retailers for convenience.

Uniform top embroidery may be done at the following Great Valley Academy approved establishments:

- Margo's Logo – 3616 Morristown Rd. Modesto – (209) 571-3413
- J & J Printing – 129 W. Yosemite Ave. Manteca – (209) 239-9567

Uniform Policy Enforcement

1st incident: Parent is informed that their child is out of uniform. Parent reviews the policy and agrees to correct uniform issue the next day.

2nd incident: Student is sent to the school office. Parent is contacted to bring appropriate clothing right away. Student returns to class until their parent arrives.

3rd incident: Student is sent to the school office. Parent is contacted for one-on-one meeting to address policy adherence and to bring appropriate clothing right away. Student remains in the office until parent arrives. GVA may offer any reasonable assistance necessary to ensure the student adheres to the school uniform policy.

GREAT VALLEY ACADEMY ATTENDANCE POLICY POLICY NO. [Attend082015]

Please call, text or email our office at (209) 213-2333 or modesto.attendance@greatvalleyacademy.com by 8:15am on the day of the absence, tardy or if the student will be leaving early. Please leave a voicemail if you call after school hours. Please provide us your child's name, teacher and reason for absence. Absences must be reported within 5 days of the absence to avoid being considered truant.

It is the intent of the governing Board of the Great Valley Academy ("Charter School") to ensure that students attend school every day on time. Consistent school attendance is critical to school success. Being present for classroom instructional time is essential for students to reach their goals and achieve their dreams. Chronic absenteeism has been linked to an increased likelihood of poor academic performance, disengagement from school and behavior problems.

Excused Absences for Classroom Based Attendance

Absence from school shall be excused only for health reasons, family emergencies and justifiable personal reasons, as permitted by law or Board policy.

A student's absence shall be excused for the following reasons:

1. Personal illness
2. Quarantine under the direction of a county or city health officer
3. Medical, dental, optometric, or chiropractic appointments
4. Attendance at funeral services for a member of the immediate family
 - a. Excused absence in this instance shall be limited to one day if the service is conducted in California or three days if the service is conducted out of state.
 - b. "Immediate family" shall be defined as mother, father, grandmother, grandfather, spouse, son/son-in-law, daughter/daughter-in-law, brother, sister or any relative living in the student's immediate household.
5. Participation in religious instruction or exercises in accordance with Charter School policy:
 - a. The student shall be excused for this purpose on no more than four school days per month.

In addition, a student's absence shall be excused for justifiable personal reasons such as:

1. Appearance in court
2. Attendance at a naturalization ceremony
3. Attendance at a funeral
4. Observation of a holiday or ceremony of his/her religion
5. Attendance at religious retreats for no more than four hours during a trimester

Method of Verification

When students who have been absent return to school, they must present a satisfactory explanation verifying the reason for the absence. The following methods may be used to verify student absences:

1. Signed, written note from parent/guardian, parent representative;
2. Conversation, in person or by telephone, between the verifying employee and the student's parent/guardian or parent representative. The employee shall subsequently record the following:
 - a. Name of student
 - b. Name of parent/guardian or parent representative
 - c. Name of verifying employee
 - d. Date or dates of absence
 - e. Reason for absence
3. Visit to the student's home by the verifying employee, or any other reasonable method, which establishes the fact that the student was absent for the reasons stated. A written recording shall be made, including information outlined above.
4. Healthcare provider verification
 - a. When excusing students for confidential medical services or verifying such appointments, Charter School staff shall not ask the purpose of such appointments but may contact a medical office to confirm the time of the appointment.
 - b. A healthcare provider's note of illness will be accepted for any reported absence. When a student has had 14 absences in the school year for illness verified by methods listed in #1-#3 above without a healthcare provider's note, any further absences for illness must be verified by a healthcare provider.

Insofar as class participation is an integral part of students' learning experiences, parents/guardians and students shall be encouraged to schedule medical appointments during non-school hours.

Students should not be absent from school without their parents/guardians' knowledge or consent except in cases of medical emergency. Student absence for religious instruction or participation in religious exercises away from school property may be considered excused subject to administrative regulations and law.

Unexcused Absences/Truancy for Classroom Based Attendance

Students shall be classified as truant if the student is absent from school without a valid excuse three full days in one school year, or if the student is tardy or absent for more than any 30-minute period during the school day without a valid excuse on three occasions in one school year, or if the student is tardy or picked up early for any length of time during the school day without a valid excuse on five occasions in one school year, or any combination thereof. Such students shall be reported to the Principal or designee. Adopted/Ratified: [September 28, 2015] Revision Date: 3

In addition, students shall be classified as a chronic truant if the student is absent from school without a valid excuse for 10 percent or more of the school days in one school, from the date of enrollment to the current date.

The Principal, or designee, shall implement positive steps to reduce truancy, including working with the family in an attempt to resolve the attendance problem. A student's progress and learning may be affected by excessive unexcused absences. In addition, the Charter School is fiscally dependent on student attendance and is negatively impacted by excessive unexcused absences. If all attempts to resolve the student's attendance problem are unsuccessful, the Charter School will implement the processes described below.

Process for Upholding the Attendance Policy

First Day of School Process

When students are not in attendance on the first five (5) days of school, the Charter School will attempt to reach the parent/guardian on a daily basis for each of the first five days to determine whether the student has an excused absence, consistent with the process outlined in this policy. If the student has a basis for an excused absence, parents must notify the school of the absence and provide documentation consistent with this policy. However, consistent with process below, students who are not in attendance due to an unexcused

absence by the fifth day of school will be dis-enrolled from the school roster, as it will be assumed that the student has chosen another school option.

1. Students who are not in attendance on the first day of school will be contacted by phone to ensure their intent to enroll.
2. Students who have indicated their intent to enroll, but have not attended by the third day will receive a letter indicating the student will be dis-enrolled after the fifth day of school if the student has not attended school without valid excuse.
3. Students who have indicated their intent to enroll, but have not attended by the fifth day will receive a phone call reiterating the content of the letter.
4. Students who have not attended by the sixth day, and do not have an excused absence as defined above for not being in attendance will be dis-enrolled from the roster.
5. The School will use the contact information provided by the parent/guardian in the registration packet.
6. The District of Residence will be notified of the student's failure to attend Charter School and the disenrollment.

Truancy Process

1. Each of the first two (2) unexcused absences will result in a call home to the parent/guardian by the Principal or designee. The student's classroom teacher may also call home.
2. Each of the third (3rd) and fourth (4th) unexcused absences will result in a call home to the parent/guardian by Principal or designee. In addition, the student's classroom teacher may also call home and/or the School may send the parent an e-mail notification. In addition, upon reaching three (3) unexcused absences or three (3) over 30 minute unexcused tardies in a school year, the parent/guardian will receive "Truancy Letter #1" from the school. This letter must be signed by the parent/guardian and returned to the school. This letter shall also be accompanied by a copy of this Attendance Policy. This letter, and all subsequent letter(s) sent home, shall be sent by Certified Mail, return receipt requested, or some other form of mail that can be tracked.
3. Upon reaching seven (7) unexcused absences including unexcused tardies, the parent/guardian will receive "Truancy Letter #2 – Conference Request," and a parent/guardian conference will be scheduled to review the student's records and develop an intervention plan/contract.
4. Upon reaching ten (10) unexcused absences including unexcused tardies, the student will be referred to a Student Success Team (SST) and the School Attendance Review Team (SART). In addition, the parent/guardian will receive a "Habitual Truancy Re-classification Letter #3," and may be asked/invited to attend an evening assembly for parents/guardians of chronically absent students.
5. The SART panel will be composed of the Principal, and other staff members as deemed necessary. The SART panel will discuss the absence problem with the Parent/Guardian to work on solutions, develop strategies, discuss appropriate support services for the student and his/her family, and establish a plan to resolve the attendance issue.
 - a. The SART panel shall direct the parent/guardian that no further unexcused absences or tardies can be tolerated.
 - b. The parent shall be required to sign a contract formalizing the agreement by the parents to improve the child's attendance or face additional administrative action. The contract will identify the corrective actions required in the future, and indicate that the SART panel shall have the authority to order one or more of the following consequences for non-compliance with the terms of the contract:
 - i. Student retention
 - ii. Required school counseling
 - iii. Loss of field trip privileges
 - iv. Loss of school event privileges
 - v. Required remediation plan as set by the SART
 - vi. Notification to the District Attorney
 - c. The SART panel may discuss other school placement options.
 - d. Notice of action recommended by the SART will be provided in writing to the parent/guardian.

6. If the conditions of the SART contract are not met, the student may incur additional administrative action up to and including disenrollment from the school and notification of the disenrollment sent to the student's district of residence.
7. For all communications set forth in this process, the Charter School will use the contact information provided by the parent/guardian in the registration packet. It is the parent's or guardian's responsibility to update the Charter School with any new contact information.
8. If student is absent ten (10) or more consecutive school days without valid excuse and parent/guardian cannot be reached at the number or address provided in the registration packet and does not otherwise respond to the Charter School's communication attempts, as set forth above, the student will be in violation of the SART contract, and the SART panel will recommend that the student be deemed to have voluntarily dis-enrolled and notification of the disenrollment be sent to the student's district of residence.

Removal from Charter School

If, after the above procedures have been followed, the student continues to have unexcused absences, the parent/guardian may receive notice that the student is in violation of the SART contract. The student will then be required to appear before the SART panel again to discuss the unexcused absences. After such meeting, or after reasonable attempts by the SART panel to schedule the meeting if the parent/guardian is nonresponsive, the SART panel may recommend that the student be deemed to have voluntarily dis-enrolled from the Charter School. The parent will receive written notice of the SART panel's recommendation.

The SART panel shall then forward its recommendation to the Governing Board for review of the matter and final decision. The parent/guardian will receive written notice of the date and time of the Governing Board review. Such notice shall be sent at least five (5) days prior to the Board review. The Board's decision shall be final as to that recommendation.

If there is a Board decision to dis-enroll, notice will be sent to the student's district of residence within thirty (30) days.

A Board decision not to dis-enroll the student does not prevent the SART panel from making a similar recommendation in the future.

Referral to Appropriate Agencies or County District Attorney

It is the Charter School's intent to identify and remove all barriers to the student's success, and the School will explore every possible option to address student attendance issues with the family. For any unexcused absence, the Charter School may refer the family to appropriate school-based and/or social service agencies.

If a child's attendance does not improve after a SART contract has been developed according to the procedures above, or if the parents fail to attend a required SART meeting, the Charter School shall notify the District's Attorney's office, which then may refer the matter for prosecution through the court system. Students 12 years of age and older may be referred to the juvenile court for adjudication.

These policies will be enforced fairly, uniformly, and consistently without regard to the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code or association with an individual who has any of the aforementioned characteristics).

Reports

The Principal, or designee, shall gather and report to the Board the number of absences both excused and unexcused as well as students who are truant, and the steps taken to remedy the problem.

Coming Late or Leaving School Early

When a child comes to school late or leaves early, it puts the child in a poor position to learn and sets a bad example for the entire class. It is important to arrive at school on time and stay until dismissal to maximize learning potential, develop positive work ethic, and show respect for all other students.

If your child arrives late to school, you must check in at the office to sign your student(s) in prior to your child going to his/her classroom in order to receive the appropriate pass. You will be issued a C.A.R.E. Package Pass (Child Admission for Road to Education) for your child to give to his/her teacher.

Because of our concern for the safety of our students, no student is to leave the school grounds at any time without permission from the office. **Parents must check in at the school office** when picking up their child before dismissal. You will be issued a B.Y.E. Pass (Bridge to Your Home Environment) to present to your child's teacher for early dismissal.

The following guidelines will apply:

- Leaving early will be determined excused or unexcused by the same criteria used for attendance.
- Children will be released only to the people listed on the emergency card.
- Written permission from parent/guardian will be required for children to be released to someone not on the emergency card.
- The person to whom the child is to be released will be required to sign a log in the school office indicating time of the release.
- Identification will be required if the person is not known to the office staff.
- Teachers may release a child to an adult only after receiving notification from the principal or secretary.
- No child will be permitted to leave school alone during school hours.
- A parent/guardian or authorized adult must pick up the child inside the school.

Students are transported to and from school by parents or carpool drivers.

Morning Drop-off Times

- **K-8 7:45 AM – 8:00 AM**

After 8:15 your Kindergarten AM child is tardy.

After 8:15 your 1st-8th grade child is tardy.

After 11:55 your Kindergarten PM child is tardy.

Please sign them in at the front office.

Kids Care is available as early as 7:00 AM for a fee for those that need to be dropped off prior to drop off times.

Independent Study

If you know your student is not going to be at school at least three days due to family vacation, religious instruction or extended illness, you may request an independent study packet from your teacher for your child.

All requests for independent study **MUST** go through the teacher and **need to be at least two weeks** (if possible) **in advance** of their absence. If the teacher has concerns granting the independent study for a particular student, the teacher will forward the request to administration for review and determination. This allotted time is needed to collect work and make sure all paperwork is signed properly. Independent study is a way for your student to stay up to date with their classroom work while being absent from school. It also helps our school maintain our Average Daily Attendance. Initial independent study requests will not be granted for more than 30 school days. Subsequent requests will require meeting with the school administration to determine longer term needs of the student.

GVA Parking Lot Procedures

Tully Road Drop Off (Opens at 7:45 AM - Closes at 8:15 AM)

1. Please wait for Parking Lot Attendants to safely open your car door and escort your child/children out of the car.
2. Please remember **ONLY RIGHT TURNS** allowed when exiting the Tully Road Parking lot (for safety reasons - **NO LEFT TURNS**)
3. **NO Parking in ANY Red Tow Away Zones.** These are **Fire Lanes** and we would not want any of our GVA parents to get a **costly ticket**.

Woodrow Road Drop Off (Opens for Pedestrian Use ONLY at 7:45AM)

1. Parking lot will close to vehicle access from 7:30 AM and 8:15 AM (for safety reasons **NO Vehicles** will be allowed to enter or exit the parking lot during this time)
2. Arrival time is 7:45 AM please wait for the Parking Lot Attendants to open the pedestrian gate before walking onto the lot.
3. **NO Parking in ANY Red Tow Away Zones.** These are **Fire Lanes** and we would not want any or our GVA Parents to get a **costly ticket**.
4. **NO Parking** in the business parking lot across from GVA.

Afternoon Pick-up

Sibling Pick-up

Kindergarten students with older siblings will be picked up by a teacher and escorted to the foyer of the auditorium where Sibling Pick-Up is located. All other students in grades 1-8 that have older siblings will be released from their teacher a few minutes early to walk over to Sibling Pick-Up. Older siblings are responsible for picking up their younger siblings and taking them back to the oldest siblings' pick-up location.

Tully Road Parking lot Pick-Up (Opens at 2:55 PM)

- Please make sure to have your student's sign in the windshield of your car before you pull into the parking lot to pick up your child. Student signs should say, grade and last name.
- Cars will pull into the parking lot and will stop at the stop sign designated for their students' grade and wait for a Parking Lot Attendant to collect their child/children and make sure they are safely placed into their vehicle before exiting the parking lot.
- NO Pedestrians are permitted in Tully Lot.
- Please remember **ONLY RIGHT TURNS** allowed when exiting the Tully Road Parking Lot (for safety reasons- **NO LEFT TURNS**)
- **No Parking in RED zones.** These are tow away zones.

Woodrow Road Parking lot Pick-Up (Open to pedestrians at 2:50 PM)

- Parking Lot will close to vehicle access from 2:40 PM- 3:15 PM (for safety reasons **NO Vehicles** will be allowed to enter or exit the parking lot during this time)
- **ALL K-8: For** students to exit campus through the Woodrow Lot they **MUST** have a PERMISSION TO WALK form on file in the front office.
- **K-2:** Please meet your K-2 students in the Woodrow Lot to walk off campus together. They will stand near the east gate entrance with Parking Lot Attendants until you arrive.
- Only K-2 Students with a 3-8 sibling may walk off campus as designated on the permission to walk form.
- **NO Parking in ANY Red Tow Away Zones.** These are **Fire Lanes** and we would not want any or our GVA Parents to get a **costly ticket**.
- **NO Parking** in the business parking lot across from GVA.

At any time, GVA can contact appropriate law enforcement agencies and/or child protective services for a child who is left unattended by a parent/guardian.

Inappropriate behavior or driving may lead to revocation of a parent's right to utilize school premises for drop off/pickup.

Students dropped-off prior to school gates opening or after designated pick-up times will be directed to Kids' Care. Parents/Guardians will be charged according to the standard drop-in rates.

Classroom Celebrations and Activities

Celebrations will occur at various times and for various reasons throughout the year. Please check ParentSquare or with your student's teacher for information. When celebrating specific holidays, Great Valley Academy will attempt to respect the beliefs of all families. Please contact your child's classroom teacher if you would like to share information regarding your family's beliefs. **Birthdays** - Please contact your child's teacher regarding birthday celebrations.

Emergency Contacts/Registration Card

If your child is injured or becomes ill at school, we will make every effort to contact you. Please be sure that your emergency contact information on your Student Registration Card is filled out completely and accurately. Also make sure that it is on file in the school office so we may reach you at home or work. The registration card should also list the names and numbers of at least two people we can call if we are unable to contact you. Please be sure that the people you list as emergency contacts are aware of this and are willing and able to take responsibility for your child. **Please update the information as any changes occur.**

Illness

To protect the health of your child and other students, we expect children to be picked up from school if they have a **fever of 100.4 or above, rash, head lice, or similar communicable symptoms**. Please notify the school if your child has been diagnosed with a communicable disease, and keep the student home until fully recovered. A student should be fever free and not vomited for 24 hours before returning to school.

Immunizations

Pursuant to the California Health and Safety Code and the California Code of Regulations, children must have a minimum number of immunizations (shots) before they can attend school. Immunization records will be required for all incoming students. Verification of immunizations will be completed with written medical records from the child's doctor or immunization clinic. To ensure a safe learning environment for all students, the Charter School follows and abides by the health standards set forth by the state of California. Students will not attend school until all required records have been received. The immunization status of all students will be reviewed periodically. Those students who do not meet the State guidelines may be excluded from school until the requirements are met. Students who have been exposed to a communicable disease for which they have not been immunized may be excluded from school at the discretion of the Charter School.

These required immunizations include:

Child's Grade	List of shots required to attend school
Entering Kindergarten	Diphtheria, Pertussis, and Tetanus (DTaP) - Five (5) doses Polio - Four (4) doses Measles, Mumps, and Rubella (MMR) - Two (2) doses Hepatitis B (Hep B) - Three (3) doses Varicella (chickenpox) – Two (2) doses NOTE: Four doses of DTaP are allowed if one was given on or after the fourth birthday. Three doses of Polio are allowed if one was given on or after fourth birthday. MMR doses must be given on or after first birthday.
Entering 7th Grade	Tetanus, reduced Diphtheria, and acellular Pertussis (Tdap) - One (1) dose Varicella - Two (2) doses

	NOTE: In order to begin 7th grade, students who had a valid personal belief exemption on file with a public or private elementary or secondary school in California before January 1, 2016 must meet all requirements for children 7-17 years old (i.e., polio, MMR, chickenpox and primary series for diphtheria, tetanus, and pertussis), <u>in addition to</u> the 7th grade requirements for Tdap and two (2) doses of Varicella.
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A copy of Great Valley Academy's full Immunization Policy is available in the School Office.

Medication

GVA staff is responsible for overseeing the administration of medication to students attending GVA during regular school hours, including before or after-school programs, field trips, extracurricular or co-curricular activities, and camps or other activities that typically involve at least one overnight stay from home. It is imperative that practices followed in the administration of medication be carefully delineated to ensure the safety of our students and the legal protection of our employees. Any pupil who is required to take, during the regular school day medication prescribed for him or her by a physician or surgeon, or ordered for him or her by a physician assistant practicing in compliance with Chapter 7/7 (commencing with Section 3500) of Division 2 of the Business and Professions Code, may be assisted by the school nurse or designated school personnel or may carry and self-administer prescription auto-injectable epinephrine if GVA receives the appropriate written statements as follows:

1. In order for a pupil to carry and self-administer prescription auto-injectable epinephrine, GVA shall obtain both a written statement from the physician or surgeon or physician assistant detailing the name of the medication, method, amount, and time schedules by which the medication is to be taken, and confirming that the pupil is able to self-administer auto-injectable epinephrine and a written statement from the parent, foster parent or guardian of the pupil consenting to the self-administration, providing a release for the school nurse or designated school personnel to consult with the health care provider of the pupil regarding any questions that may arise with regard to the medication, and releasing GVA and school personnel from civil liability if the self-administering pupil suffers an adverse reaction as a result of self-administering medication.
2. Additionally, the school nurse or trained personnel who have volunteered may use epinephrine auto-injectors to provide emergency medical aid to persons suffering or reasonably believed to be suffering from an anaphylactic reaction. GVA will ensure it has the appropriate type of epinephrine auto-injector on site (i.e. regular or junior) to meet the needs of its pupils. GVA will ensure staff properly store, maintain, and restock the epinephrine auto-injectors as needed.
3. GVA will ensure any school personnel who volunteer are appropriately trained regarding the storage and emergency use of epinephrine auto-injectors based on the standards developed by the Superintendent of Public Instruction. GVA will distribute an annual notice to all staff describing the request for volunteers who will be trained to administer an epinephrine auto-injector to person if that person is suffering or reasonably believed to be suffering from anaphylaxis. The annual notice shall also describe the training the volunteer will receive.
4. In order for a pupil to be assisted by the school nurse or other designated school personnel in administering medication other than emergency epinephrine auto-injectors, or inhaled asthma medications, GVA shall obtain both a written statement from the physician or surgeon or physician assistant detailing the name of the medication, method, amount, and time schedules by which the medication is to be taken and a written statement from the parent, foster parent, or guardian of the pupil indicating the desire that GVA assist the pupil in the matters set forth in the statement of the physician or surgeon or physician assistant.

Guidelines:

- The primary responsibility for the administration of medication rests with the parent/guardian, student and medical professional.
- Medication shall be administered only during school hours if determined by a physician to be necessary.
- Medication must be in original packaging.

- For prescribed medication, the medication must be prescribed and labeled with the student's name.
- Designated staff shall keep records of medication administered at GVA.
- All medication will be kept in a secure and appropriate storage location and administered per physician's instructions by appropriately designated staff.
- Designated staff shall return all surplus medication to the parent/guardian upon completion of the regimen or prior to extended holidays.
- Designated staff shall establish emergency procedures for specific medical conditions that require an immediate response (i.e. allergies, asthma, diabetes).
- The written statements specified in this policy shall be provided at least annually and more frequently if the medication, dosage, frequency of administration or reason for administration changes.
- A pupil may be subject to disciplinary action if that pupil uses auto-injectable epinephrine in a manner other than as prescribed.
- Any pupil requiring insulin shots must establish a plan for administration of insulin shots with the Executive Director in consultation with the parent or guardian and the pupil's medical professional.

Head Lice

Great Valley Academy recognizes that head lice infestations among students require treatment but do not pose a risk of transmitting disease. Great Valley Academy shall encourage early detection and treatment in a manner that minimizes disruption to the educational program and reduces student absences.

- School employees shall report all suspected cases of head lice to the school health clerk or designee as soon as possible.
- If a student is found with active, adult head lice, the parent/guardian will be called to pick-up the child. The parent/guardian of any such student shall be given information about treatment of head lice and encouraged to begin treatment immediately and to check all members of the family.
- The parent/guardian shall be informed that the student shall be checked upon return to school the next day and allowed to remain in school if no active head lice are detected.
- Upon the student's return to school, the school health clerk or designee shall check the student for active head lice. If it is determined that the student remains infected with head lice, the school health clerk or designee shall contact the student's parent/guardian to discuss treatment and have the parent/guardian pick-up the child.
- If a student is found consistently infested with head lice, the student may be referred to a wellness team which may consist of the school health clerk, Principal, local health services and other appropriate individuals, to determine the best approach for identifying and resolving problems contributing to the student's head lice infestations.
- When it is determined that one or more students in a class or school are infested with head lice, the Principal or designee may, at their discretion, notify parents/guardians of students in that class or school and provide them with information about the detection and treatment of head lice.
- School staff shall maintain the privacy of students identified as having head lice.

Mental Health Services

In accordance with AB 2022, Pupil mental health services: school notification, Great Valley Academy wants to ensure that parents, guardians, and students are informed about resources available for anyone who believes they are in a mental health crisis. We encourage parents/guardians and student to talk with any staff member of Great Valley Academy if they are concerned about another student and possible mental health needs. Take all threats of suicide seriously.

There are a number of resources available in our community for students who struggle with social/emotional related issues. If your child experiences social/emotional challenges that are impacting his/her ability to succeed, please contact your school administrator or one of the mental health resources listed below. This document is also available on our website at www.greatvalleyacademy.com

Resource	Contact Info	Services Provided
Aspiranet	(209) 576-1750 1620 Cummins Drive	Individual, group and family counseling. Culturally sensitive staff available who speak English and Spanish. FEE: Medi-Cal insurance only.
The Bridge	(209) 571-8430 605 Chicago Avenue	Interpretation and translation (Cambodian, Hmong, and Laotian); referral services; cultural liaison for clients with public/private agencies; ESL class; youth activities and tutoring. FEE: None
Center For Human Services	(209) 526-1440 2000 W. Briggsmore Ave, Ste. I	Individual, group and family counseling. Services offered in English and Spanish. FEE: Sliding scale; accepts Medi-Cal.
Children's Crisis Center	(209) 577-0138/(209) 577-4413 1244 Fiori Avenue	Parenting classes, advocacy program, 24-hour crisis line, emergency child care. FEE: Free to qualifying families.
Community Hospice	(209) 578-6300 4368 Spyres Way	Support groups for people grieving loss of a parent, child, sibling, friend or significant other. Culturally competent bilingual staff available. FEE: None
El Concilio	(209) 523-2860 1314 H Street	Counseling, referrals and education. Free ESL/citizenship classes, immigration, first time home buying/financial literacy, assistance, support groups, counseling/referrals, health and parent education. FEE: None
Haven Women's Center	(209) 524-4331 (888) 454-2836 24hr crisis line 618 13 th Street, Suite I	Education/ emotional support groups, individual counseling, rape crisis intervention help, domestic violence, restraining orders, battered women's shelters. Youth groups for children and teens impacted by DV or sexual abuse. FEES: Free support groups; no fee for any services.
Health Net (MHN)	(888) 426-0030	For Medi-Cal consumers who have been determined to meet criteria for mild to moderate mental health services. Contact the number for referrals and further information. FEE: None
Josie's Place Drop-In Center	(209) 558-4464 1208 9 th Street	Provides a safe environment for 16-25 year olds with serious emotional disturbance or mental illness. Employment and housing resources, access to computers, games, billiards, organized activities. FEE: None
Parents, Families, and Friends of Lesbians and Gays (PFLAG)	(209) 566-2468 324 College Avenue	A supportive group that believes in the dignity and worth of all individuals. Confidential emotional support, education, and opportunities for advocacy. FEE: None
Parent Resource Center	(209) 549-8822/(209) 549-8193 530 S. Santa Cruz Avenue/ 811 5 th Street	Resource centers provide a wide range of services from support (clothes closets and food) to mental health counseling. FEE: None
Parents United	(209) 524-4858 610 14 th Street	One-on-one counseling for adults molested as children and adult offenders; groups for children. FEE: Medi-Cal, Private Insurance, Victim Witness. Free for uninsured Stanislaus County residents.
Sierra Vista Child and Family Services	Children: (209) 550-5869 1400 K Street, Ste. B Adults: (209) 524-6371 1030 15 th Street	Variety of child, adult and family services including individual/family and divorce counseling, court ordered counseling, parent education, anger management, domestic violence programs. FEE: Sliding scale, private insurance, Medi-Cal, no-fee parenting classes.

Lost and Found

Please **mark your child's name on all personal items** such as sweaters, hats, gloves, coats, lunch containers, and book bags. Check for lost items in our lost and found. Items not claimed are periodically donated to charity. GVA is not responsible for lost or stolen personal items brought to campus

Kids' Care (Before/After School Child Care)

Great Valley Academy commits to serving families by providing high- quality before and after school care that provides a nurturing and enriched environment for children. Students will have the opportunity to participate in a range of age- appropriate activities. Please contact Kids' Care for details in securing a space for your child. Information can be found at <https://www.greatvalleyacademy.com/pages/Kids-Care.html> Depending on the program, a contract will need to be signed and payment arrangements made.

Kids Care – Days Closed for 2022-2023

September 5 th	November 11 th	November 23 rd – 25 th	December 23 rd , 26 th , 30 th
January 2 nd	January 16 th	February 20 th	April 7 th & 10 th
May 5 th	May 29 th	July 4 th	

Kindergarten Extension

Kindergarten Extension is a unique program offered to GVA Kindergartners. It is either an extension at the end of the day for morning kindergartners or prior to the day for afternoon kindergartners. The program offers GVS (Great Valley Smart) type activities that will help to make our kindergartners better learners in the classroom. This program starts in September each year.

Recess

Recesses are scheduled. Each grade level has a scheduled time that they will be out for recess. If you want to know your student's time, check with your child/children's teacher. Recess times are subject to change based on classroom needs.

Electronic Devices

All personal electronic devices (including, but not limited to, cell phones, computers, music players, game systems, smart watches, recording devices, cameras, etc.) **must be** turned off and put away at all times while on the school campus. Additionally, the use of personal electronic devices are **prohibited** during school-sponsored events, such as field trips, sporting events, after school clubs, etc. For a variety of reasons, these devices are not conducive to a social school community atmosphere. Headphones of any kind are not to be worn unless they are plugged into a school device for education purposes.

Great Valley Academy may grant permission to use devices for special events or under certain circumstances. The school will communicate these opportunities to parents and students.

At no time may any person use an electronic listening or recording device (including but not limited to cell phones, smart watches, video cameras, cameras, remote applications, etc.) without the prior consent of the teacher and principal.

Great Valley Academy is not responsible for the **loss, theft, or damage** to personal electronic devices.

Great Valley Academy reserves the right to search content of personal electronic devices if there are reasonable grounds for suspecting that the search will turn up evidence that the student has violated or is violating either the law or GVA rules and regulations. Articulate facts at the inception of the search must support a school official's reasonable suspicion that a search of a personal electronic device is justified. The scope of the search shall be reasonably related to the objectives of the search and not excessively intrusive in light of the age and sex of the pupil and the nature of the infraction. In no case shall a GVA official search a personal electronic device based on curiosity, rumor, or hunch. GVA reserves the right to contact law enforcement at its discretion in order to preserve the safety of all students and staff at the school.

Suggestions and Complaints

All suggestions and complaints should be of a constructive nature and be in line with the values, mission, and philosophy of the school. Staff members are open to the opinions of students who would like to contribute in this positive way. Students may approach appropriate staff members directly and offer suggestions. If the suggestion cannot be dealt with at that level, the staff member will relay the suggestion to the school administration. A copy of the schools general complaint policy is available at the office.

FERPA Rights, Student Records and Directory Information

NOTIFICATION OF RIGHTS UNDER FERPA

The Family Educational Rights and Privacy Act ("FERPA") affords parents and students over 18 years of age ("eligible students") certain rights with respect to the student's education records. These rights are:

1. The right to inspect and review the student's education records within 45 days of the day Great Valley Academy receives a request for access. Please note that the California Education Code permits access within 5 days of the request.

Parents or eligible students should submit to the Great Valley Academy Office Manager, a written request that identifies the record(s) they wish to inspect. The Officer Manager will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected. A student's education records will be available for review during the regular business hours of the school day.

2. The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.

Parents or eligible students who wish to ask Great Valley Academy to amend a record should write Great Valley Academy, Campus Principal, and clearly identify the part of the record they want changed, and specify why it should be changed. If Great Valley Academy decides not to amend the record as requested by the parent or eligible student, Great Valley Academy will notify the parent or eligible student of the decision and advise them of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.

3. The right to provide written consent before Great Valley Academy discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent.

One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. A school official is a person employed by the school as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the Great Valley Academy Board of Directors. A school official also may include a volunteer or contractor outside of the school who performs an institutional service or function for which Great Valley Academy would otherwise use its own employees and who is under the direct control of Great Valley Academy with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

Upon request, Great Valley Academy discloses education records without consent to officials of another school district in which a student seeks or intends to enroll, or is already enrolled if the disclosure is for purposes of the student's enrollment or transfer.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by Great Valley Academy to comply with the requirements of FERPA. The name and address of the Office that administers FERPA are:

Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202-8520

5. FERPA permits the disclosure of PII from students' education records, without consent of the parent or eligible student, if the disclosure meets certain conditions found in §99.31 of the FERPA regulations. Except for disclosures to school officials, disclosures related to some judicial orders or lawfully issued subpoenas, disclosures of directory information, and disclosures to the parent or eligible student, §99.32 of the FERPA regulations requires the school to record the disclosure. Parents and eligible students have a right to inspect and review the record of disclosures. A school may disclose PII from the education records of a student without obtaining prior written consent of the parents or the eligible student –

- To other school officials, including teachers, within the educational agency or institution whom the school has determined to have legitimate educational interests. This includes contractors,

consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in §99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(2) are met. (§99.31(a)(1))

- To officials of another school, school system, or institution of postsecondary education where the student seeks or intends to enroll, or where the student is already enrolled if the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of §99.34. (§99.31(a)(2))
- To authorized representatives of the U. S. Comptroller General, the U. S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as the State educational agency in the parent or eligible student's State (SEA). Disclosures under this provision may be made, subject to the requirements of §99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf. (§§99.31(a)(3) and 99.35)
- In connection with financial aid for which the student has applied or which the student has received, if the information is necessary to determine eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid. (§99.31(a)(4))
- To State and local officials or authorities to whom information is specifically allowed to be reported or disclosed by a State statute that concerns the juvenile justice system and the system's ability to effectively serve, prior to adjudication, the student whose records were released, subject to §99.38. (§99.31(a)(5))
- To organizations conducting studies for, or on behalf of, the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction. (§99.31(a)(6))
- To accrediting organizations to carry out their accrediting functions. (§99.31(a)(7))
- To parents of an eligible student if the student is a dependent for IRS tax purposes. (§99.31(a)(8))
- To comply with a judicial order or lawfully issued subpoena. (§99.31(a)(9))
- To appropriate officials in connection with a health or safety emergency, subject to §99.36. (§99.31(a)(10))
- Information Great Valley Academy has designated as "directory information" under §99.37. (§99.31(a)(11))
- To an agency caseworker or other representative of a State or local child welfare agency or tribal organization who is authorized to access a student's case plan when such agency or organization is legally responsible, in accordance with State or tribal law, for the care and protection of the student in foster care placement. (20 U.S.C. § 1232g(b)(1)(L))
- To the Secretary of Agriculture or authorized representatives of the Food and Nutrition Service for purposes of conducting program monitoring, evaluations, and performance measurements of programs authorized under the Richard B. Russell National School Lunch Act or the Child Nutrition Act of 1966, under certain conditions. (20 U.S.C. § 1232g(b)(1)(K))

NOTICE FOR DIRECTORY INFORMATION

FERPA requires that Great Valley Academy, with certain exceptions, obtain your written consent prior to the disclosure of personally identifiable information from your child's education records. However, Great Valley Academy may disclose appropriately designated "directory information" without written consent, unless you have advised Great Valley Academy to the contrary in accordance with Great Valley Academy's procedures. The primary purpose of directory information is to allow Great Valley Academy to include this type of information from your child's education records in certain school publications. Examples include:

- A playbill, showing your student's role in a drama production;
- The annual yearbook;
- Honor roll or other recognition lists;
- Graduation programs; and
- Sports activity sheets, such as for wrestling, showing weight and height of team members.

Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent's prior written consent. Outside organizations include, but are not limited to, companies that publish yearbooks. In addition, two federal laws require local educational agencies ("LEAs") receiving assistance under the Elementary and Secondary Education Act of 1965 ("ESEA") to provide military recruiters, upon request, with the following information – names, addresses and telephone listings – unless parents have advised the LEA that they do not want their student's information disclosed without their prior written consent.

If you do not want Great Valley Academy to disclose any or all of the types of information designated below as directory information from your child's education records without your prior written consent, you must notify Great Valley Academy in writing at the time of enrollment or re-enrollment. Great Valley Academy has designated the following information as directory information:

- Student's name;
- Address;
- Parent's/Legal Guardian address
- Telephone listing;
- Students' electronic mail address;
- Photograph;
- Date and place of birth;
- Dates of attendance;
- Grade level;
- Participation in officially recognized activities and sports;
- Weight and height of members of athletic teams;
- Degrees, honors, and awards received;
- The most recent educational agency or institution attended;
- Student ID number, user ID, or other unique personal identifier used to communicate in electronic systems but only if the identifier cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user. (A student's SSN, in whole or part cannot be used for this purpose.)

All written requests should be directed to Great Valley Academy, Campus Office Manager.

Visiting/Volunteering

Great Valley Academy – Board Policy No. 2018.040

While Great Valley Academy ("GVA") encourages parents/guardians and interested members of the community to visit the charter school and view the educational program, GVA's priority is creating a safe environment for students and staff. Parents volunteering in the classroom can be extremely helpful to our teachers and valuable to our students, and we are grateful to parents for their willingness to volunteer in this manner.

Volunteers are individuals who donate their time, without financial compensation, to benefit GVA. The volunteer's participation may occur in a classroom setting during the school day or outside the school setting, as part of an extracurricular activity. School policy prohibits discrimination of volunteers on the basis of race, color, national origin, creed, marital status, sex, religion, age, disability, or any other protected status as defined by federal, state or local law.

Volunteer Opportunities include:

- Tutoring/Mentoring
- Athletics
- Performing Arts/Music programs
- Classroom assistance
- School/classroom events like career fairs and field trips
- Before/After-school programs
- Non-classroom (main office, library/media center, etc.) assistance
- Playground/Recess supervision

- Fundraising events

To ensure the safety of students and staff as well as to minimize interruption of the instructional program, GVA has established the following procedures, to facilitate volunteering and visitations during regular school days:

Volunteering

Parents or guardians who are interested in volunteering in the classroom must adhere to the following guidelines:

1. Volunteers shall be (1) fingerprinted and (2) receive Department of Justice background clearance prior to volunteering. GVA reserves the right to restrict certain activities performed by a volunteer based on their background report. Additionally, background reports with serious or felony convictions (pursuant to Ed Code 45122.1) or the requirement to register as a sex offender under California law (Penal Code 290) will be prohibited from volunteering.
2. A volunteer shall also have on file with GVA a certificate showing that, upon initial volunteer assignment, the person submitted to a tuberculosis risk assessment dated within the last 60 days and, if tuberculosis risk factors were identified, was examined and found to be free of infectious tuberculosis within the last 60 days before volunteering. If no risk factors are identified, an examination is not required and only a certificate be provided. Volunteers who are found to be free of infectious TB shall thereafter be required to have a TB Risk Assessment every four years.
3. Volunteer hours must be arranged with the classroom teacher at least forty-eight (48) hours in advance.
4. Prior to volunteering in the classroom, the volunteer should communicate with the teacher to discuss the expectations for volunteering needs. Classroom volunteers are there to benefit the entire class and are not in class solely for the benefit of their own child. Classroom volunteers must follow the instructions provided by the classroom teacher or aide. Classroom rules also apply to volunteers to ensure minimal distraction to the teacher. If a volunteer is uncomfortable following the direction of the teacher or aide the volunteer may leave their volunteer position for that day.
5. In accordance with federal law, all school volunteers are expected to maintain strict confidentiality while volunteering at the school. All things that are seen and heard at school about employees or children and their families should be considered privileged/confidential information. Trust must be established and maintained in order for our volunteer program to be successful.
6. Volunteers shall follow and be governed by all other guidelines indicated elsewhere in this policy. This includes, but is not limited to, the process of registering and signing out of the campus at the main office as indicated below.
7. This policy does not authorize GVA to permit a parent/guardian to volunteer or visit the campus if doing so conflicts with a valid restraining order, protective order, or order for custody or visitation issued by a court of competent jurisdiction.
8. Volunteers understand that they will not receive any compensation or salary, or any other health or retirement benefits, or workers' compensation insurance coverage while volunteering. Volunteers agree to waive all claims against GVA and hold GVA, its officers, agents, employees, authorizer, and volunteers harmless from any and all liability or claims which may arise out of or in connection with their participation in volunteering at GVA.

Visitation

1. Visits during school hours should first be arranged with the teacher, at least forty-eight (48) hours in advance. If a conference is desired, an appointment should be set with the teacher during non-

instructional time, at least forty-eight (48) hours in advance. Parents seeking to visit a classroom during school hours must first obtain the approval of the classroom teacher.

2. All volunteers and visitors shall register in the Visitors Log Book and affix a Visitor's Sticker in a visible location on their clothing in the main office immediately upon entering any school building or grounds when during regular school hours. When registering, the visitor is required to provide his/her name, address, his/her purpose for entering school grounds, and proof of identity. For purposes of school safety and security, the campus Principal or designee may design a visible means of identification for visitors while on school premises.
3. While on campus, visitors are to enter and leave classrooms as quietly as possible, not converse with any student, teacher, or other instructional assistant unless permitted, and not interfere with any school activity. No electronic listening or recording device may be used in a classroom without the teacher, Principal and Chief Executive Officer's written permission.
4. Before leaving campus, the visitor shall sign out of the Visitors Log Book in the main office.
5. The Principal, or designee, may refuse to allow a visitor or volunteer if it is believed that the presence of the visitor or volunteer would cause a threat of disruption or physical injury to teachers, other employees, or students.
6. The Principal or designee may withdraw consent to be on campus even if the visitor has a right to be on campus whenever there is reason to believe that the person has willfully disrupted or is likely to disrupt GVA's orderly operation. Consent can be withdrawn for up to fourteen (14) days.
7. The Principal or designee may request that a visitor who has failed to register, or whose registration privileges have been denied or withdrawn, promptly leave school grounds. When a visitor is directed to leave, the Principal or designee shall inform the visitor that if he/she reenters the school without following the posted requirements he/she will be guilty of a misdemeanor pursuant to California Penal Code 626.8.
8. Any visitor that is denied registration or has his/her registration revoked may request a conference with the Principal. The request shall be in writing, shall state why the denial or revocation was improper, shall give the address to which notice of conference is to be sent, and shall be delivered to the Principal within fourteen (14) school days of the denial or revocation of consent. The Principal shall promptly mail a written notice of the date, time, and place of the conference to the person who requested the conference. A conference with the Principal shall be held within seven (7) school days after the Principal receives the request. If no resolution can be agreed upon, the Principal shall forward notice of the complaint to GVA's Chief Executive Officer. The Chief Executive Officer shall address the complaint with the Principal and make a final determination.
9. The Principal or designee shall seek the assistance of the police in managing or reporting any visitor in violation of this policy.

Penalties

1. Pursuant to the California Penal Code 626.8, if a visitor does not leave after being asked or if the visitor returns without following the posted requirements after being directed to leave, he/she will be guilty of a crime as specified which is punishable by a fine of up to \$500.00 (five hundred dollars) or imprisonment in the County jail for a period of up to six (6) months or both.
2. Under California Education Code section 44811, disruption by a parent, guardian or other person at a school or school sponsored activity is punishable, upon the first conviction by a fine or no less than \$500.00 (five hundred dollars) and no more than \$1,000.00 (one thousand dollars) or by imprisonment in a County jail for no more than one (1) year, or both the fine and imprisonment.

3. Disruptive conduct may lead to GVA's pursuit of a restraining order against a visitor, which would prohibit him/her from coming onto school grounds or attending school activities for any purpose for a period of up to three (3) years.

Field Trip Chaperones

Parent chaperones are often needed for field trips during the school year. **Parents must be fingerprinted and have a clear TB certification on file before chaperoning a field trip.** When needed, teachers will notify parents of the opportunity to chaperone. If the number of parent volunteers is greater than the number of spots available for the field trip, a lottery will be held to determine the parents able to chaperone. **Siblings are NOT allowed to attend field trips.**

Assessment and Grading

Parents will be informed of their child's progress in school by an academic report card, a character education report card, or a conference. Parents receive academic and character report cards three times a year. Character building is an important part of our curriculum. GVA adheres to Common Core Standards.

Assessment of student progress will take several forms at GVA:

- NWEA
- CAASPP/CST - Standardized Testing and Reporting
- Curriculum/Local/Benchmark Assessments
- We report to students and parents by alternating academic report cards, character education report cards, and conferences. On our report cards we use a grading scale of:
 - **4** - Work that **exceeds** the standards for competence
 - **3** - Work that **demonstrates** the standards for competence.
 - **2** – Work that meets **partial** standards for competence
 - **1** – Work that meets **minimal** standards for competence

4: Above and beyond: A score of 4 is reserved for students who surpass mastery. "4" work requires exceptional accuracy (percentages), unique perspectives, rationales, applications, or effort that results in exemplary quality.

3: Mastery: A score of 3 indicates a student has achieved the learning outcome.

2: Nearing mastery: A score of 2 indicates that a student has not yet met the learning objective. Ideally, this would result in re-teaching or specific feedback that would support the student in earning at least a "3."

1: Not there yet: A score of 1 indicates that a student lacks understanding of the specific content standard. As with a score of 2, support is required to help this student progress to mastery.

Note: "3" and "4" work may be defined by the teacher from the onset. "4" work may also be undefined and left to the student to determine. Either way, Above and Beyond is a central idea in the GVA classroom.

Character Education

We recognize that character is a developmental process. All GVA community members will be expected to understand the different stages of maturation and the behaviors that correlate to each stage. Training will be provided for all teachers, para's, students, and parents. Teachers will assess throughout the day. Students will self-assess and set goals.

Getting Extra Help for Your Student

If you feel your child is in need of extra support, talk with your child's teacher. We have an SST (Student Success Team) process for assessing needs and organizing more support.

Homework

Elementary: In order for children to grow and mature into competent young adults, they need to have time to spend with their families and participate in extra-curricular activities as well as have time to “just be kids” and play. To support our students with this, we will limit homework to reading 20 minutes a night, unfinished work, home projects, and math and spelling facts as needed. In an effort to prepare sixth graders for Junior High, sixth grade students will do math homework nightly.

Jr. High: Students should not be inundated by homework, but they need to have some on a regular basis in order to extend their learning and develop a good work habit. In general, Jr. High students will be given about one hour of homework each school night. Every assignment needs to be turned in on time. Turning in a late assignment means the child will not be prepared to fully

Achievement Testing

It is important that all schools regularly measure students’ progress in learning. This has been shown by the Effective Schools Research to be one of the most important things we can do to make sure we have high student achievement. Here are the ways that we measure student learning at Great Valley Academy:

- Teacher- developed or textbook chapter and unit tests – All teachers routinely give assessments to their students on various lessons and units that they are teaching. These assessments are graded and make up the report card grade that parents receive.
- Reading Tests – All students in grades 1-8 are tested several times per year with the Developmental Reading Assessment or Quantitative Reading Inventory. These are national standard tests of reading fluency and comprehension that indicate which grade level an individual student can successfully read and comprehend. These results are reported to parents on our report cards.
- State/Federal Tests – California requires testing each year
- Cooperative and Individual Projects – In various subjects, projects are frequently assigned and assessed by teachers. These are designed for students to demonstrate learning within our curriculum.
- NWEA – North West Evaluation Association is an organization that provides research based computerized assessments for teachers that help them hone in on their students’ needs and abilities.

Most of the parents with whom we have spoken are pleased that we do not spend all year preparing for one test. They’re also pleased their child is not experiencing a lot of pressure to perform satisfactorily on only one test. GVA teachers and parents consider the reading tests and growth shown on the internal benchmarks to be the most important measures of achievement. We are happy to discuss with you the measurements of achievement that we have chosen and to show you samples at any time.

Special Education

GVA is dedicated to the belief that all students can learn and must be guaranteed equal opportunity to become contributing members of the academic environment and society. GVA provides special education instruction and related services in accordance with the Individuals with Disabilities in Education Improvement Act (IDEIA), Education Code requirements. These services are available for special education students enrolled at GVA.

GVA offers high quality educational program and services for all its students in accord with the assessed needs of each student. GVA collaborates with parents, the student, teachers and other agencies as may be indicated, in order to best serve the educational needs of each student. If you have any questions or concerns related to special education services for GVA students, please contact the principal, Mr. Ruehle at (209) 576-2283 or m.ruehle@greatvalleyacademy.com. Likewise, if you have any questions regarding Section 504 or would like a copy of our policies, please contact Mr. Ruehle.

Textbook & Chromebook Policy

Students may be issued textbooks and/or Chromebooks from their classroom teacher. Students are responsible for the care of their textbook and Chromebook. Textbooks and Chromebooks are assigned to students and the condition is noted. **Any textbook or Chromebook checked out to a student that is not returned or is returned in poor condition will have to be replaced at the parents cost.**

Students are expected to meet financial obligations to the school for such items as lost textbooks, Chromebooks, sports uniforms, fundraiser items, etc. Students **must** meet their current obligations as it may affect their ability to purchase yearbooks, purchase tickets to special events, participate in promotion ceremonies, etc.

Discipline Philosophy and Practice

At all times we will treat the students kindly and respectfully, and work to have warm relationships. At Great Valley Academy we have one school rule for all students and adults within the school. That rule is “**Do The Right Thing, Because It Is The Right Thing To Do.**” That is exactly what we want to teach our students.

We do the right thing as we go through our daily lives not because someone is going to give us a reward, or because we will be punished, but because it is the right thing to do. It will make us happier and those around us happier. Doing the right thing helps promote better learning.

At our school we believe that talking it through will solve many problems. Teachers engage the students in reflecting on their behavior. We teach our students a process for talking through problems that promotes self-evaluation for improved behavior. The prevention of all discipline problems by developing good relationships with our students and creating classrooms that are need-fulfilling for students is a primary goal at Great Valley Academy. If a student does disrupt learning, we will:

- Ask the student to please do his/her work in another area of the room.
- A student may be asked to go to another classroom (which has been arranged ahead of time) until he/she is ready to rejoin his/her regular classroom.

If the student is disruptive in the hosting classroom, or the student’s teacher believes the disruption is severe, then the student may go to the connecting room or alternate supervised location. During the time out of the classroom, the connector or an administrator will work with the child in order to help the student calm down and feel happier.

- If there is defiance, violence or threat of violence, administration will be contacted.

If the incident is severe enough (violence, threats, or repeated disruption of learning), it may warrant a suspension. Progressive discipline may be used in order to help the child improve behavior. For example progressive discipline may look like this:

1st Incident – The student goes home that day and also the next day.

2nd Incident – The student goes home, two-day suspension.

3rd Incident – The student goes home, three-day suspension.

State of California Law Regarding School Safety

It is the policies of the State Board of Education that all students enrolled in public schools in California have the right to safe schools. The State Board believes that students cannot benefit fully from an educational program unless they attend school regularly in an environment that is free from physical and psychological harm.

Drug and Alcohol Free School

Great Valley Academy will take a firm but compassionate approach toward students using drugs and/or alcohol. Our policy is aimed at taking a firm disciplinary stance for drug and alcohol related incidents at school. At the same time, we recognize that some students may require drug and/or alcohol treatment information and access to drug and/or alcohol treatment programs in order to truly become drug and alcohol free.

Gun-Free School Zone Act

Pursuant to Penal Code 626.9 known as the Gun-Free School Zone Act of 1995, any person who possess a firearm in a place that the person knows, or reasonably should know, is a school zone, shall be punished according to PC 626.9.f. A “school zone” means an area in, or on the grounds of, a public or private school providing instruction in kindergarten or grades 1 – 12, inclusive, or within a distant of 1,000 feet from the grounds of the public or private school. Great Valley Academy has zero tolerance for gun and weapon possessions on campus or GVA sponsored events. Local authorities will be contacted for any violation.

Tobacco Use

State of California law prevents anyone from using any form of tobacco on school premises. Please extinguish cigarettes, cigars, pipes and discard any other forms of tobacco before entering our parking lot/driveways and other school property.

Suicide Prevention Policy

In response to California State Assembly Bill 2246, Great Valley Academy has adopted a suicide prevention policy. If you would like to review the suicide prevention policy, please contact the campus office.

Student/Staff Interaction Policy

Adopted Board Policy 2019.47- April 2019

GVA recognizes its responsibility to make and enforce all rules and regulations governing student and employee behavior to bring about the safest and most learning-conducive environment possible.

Corporal Punishment

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student. For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent excessive damage to property.

Acceptable and Unacceptable Staff/Student Behavior

This policy is intended to guide all GVA staff in conducting themselves in a manner that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between students and staff.

Although this policy gives direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders.

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing the boundaries of a student/staff relationship is deemed an abuse of power and a betrayal of public trust.

Some activities may seem innocent from a staff member's perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct, harmful, or abusive. Staff must understand their own responsibility for ensuring that they do not violate the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Violations could subject the employee to discipline up to and including termination. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interactions must have boundaries surrounding potential activities, locations and intentions.

The following examples are not exhaustive lists:

Unacceptable Staff/Student Behaviors (Violations of this Policy)

- (a) Giving gifts to an individual student that are of a personal and intimate nature.
- (b) Any type of inappropriate physical contact with a student. This includes but is not limited to; massages, lingering touches, squeezing, stroking of hair, touches to private body areas.
- (c) Intentionally being alone with a student away from the school.
- (d) Making or participating in sexually inappropriate comments, storytelling or jokes.
- (e) Seeking emotional involvement with a student for your benefit.
- (f) Becoming involved with a student such that a reasonable person may suspect inappropriate behavior.

Acceptable and Recommended Staff/Student Behaviors

- (a) Getting parents' written consent for any off school property or after-school activities.
- (b) Emails, text, phone and instant messages to students must be very professional and pertaining to school activities or classes.
- (c) Keeping the door open when alone with a student.
- (d) Keeping reasonable space between you and your students.
- (e) Stopping and correcting students if they cross your own personal boundaries.
- (f) Keeping parents informed when a significant issue develops about a student.
- (g) Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries.
- (h) Involving your supervisor if conflict arises with the student or has the potential to become severe.
- (i) Making detailed notes about an incident that could evolve into a more serious situation later.
- (j) Recognizing the responsibility to stop unacceptable behavior of students or coworkers.
- (k) Recommend asking another staff member to be present if you will be alone with a student.
- (l) Pats on the back, high fives and handshakes are acceptable.
- (m) Hugs of an appropriate nature, often student initiated, that are quick, non-sexual, and side to side when possible. For the purpose of this policy, the term "hug" is defined as a quick and appropriate embrace between a staff member and student as form of admiration, respect and/or care. GVA's philosophy of Safe, Loved and Learning allows for safe interactions such as hugs in order to support students overall well-being and foster authentic adult interactions. Hugs should in no way be excessive, aggressive, lasting for a prolonged period of time.
- (n) Keeping your professional conduct a high priority.

This policy does not prevent: 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; 3) engaging in a rescue or application of Cardio Pulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Excessive force is prohibited.

Boundaries Reporting

When any staff member, parent, or student becomes aware of a staff member (or volunteer, guest, vendor) having violated the boundaries specified in this policy, or has a strong suspicion of misconduct, he or she must report the suspicion to an Administrator promptly. Reasonable suspicion means something perceived in spite of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the school as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse. The Administrator will notify the Chief Executive Officer or designee promptly upon investigation.

Child Abuse / Sexual Abuse Reporting (Mandatory Reporting)

If, within your professional capacity or within the scope of your employment, you observe or obtain possession of knowledge that a child has been a victim of child abuse or sexual abuse, or you reasonably suspect it, California Penal Code Section 11166 requires you to immediately report this information or suspicion directly to a child protective agency or the police. The report shall be made by phone immediately and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse. Please refer to GVA policy resolution 2019.046 for detailed reporting requirements.

Investigating

The Administrator will promptly investigate, document and report to the Chief Executive Officer or designee the investigation of any allegation of sexual misconduct or inappropriate behavior, using such support staff or outside assistance, as he or she deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating Administrator, and all others privy to the investigation, shall protect the

privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as reasonably as possible. The Chief Executive Officer or designee shall promptly notify the Governing Board in closed session of the existence and status of any investigations. Upon completion of any such investigations, the Chief Executive Officer or designee shall report to the Governing Board any conclusions reached. The Chief Executive Officer or designee shall consult with legal counsel, as appropriate, prior to, during, and after conducting any investigation.

Consequences

Staff members who violate this policy will be subject to disciplinary action up to and including termination, and where appropriate, will be reported to authorities for potential legal action.

Non-Discrimination Statement

GVA shall not discriminate against any student or employee on the basis of (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, religious affiliation, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in the California Penal Code or association with an individual who has any of the aforementioned characteristics).

The School adheres to all provision of federal law related to students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990 (ADA) and the Individuals with Disabilities In Education Improvement Act of 2004 (IDEIA).

GVA is committed to providing a work and educational atmosphere that is free of unlawful harassment under Title IX of the Education Amendments of 1972 (sex); Title IV, VI, and VII of the Civil Rights Act of 1964 (race, color or national origin); The Age Discrimination in Employment Act of 1967; The Age of Discrimination Act of 1975; the IDEIA; and Section 504 and Title II of the ADA (mental and physical disability). GVA also prohibits sexual harassment, including cyber sexual bullying, and harassment based upon pregnancy, childbirth or related medical conditions, race, religion, religious affiliation, creed, color, gender, gender identity, gender expression, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation, or any other basis protected by federal, state, local law ordinance or regulation. GVA does not condone or tolerate harassment of any type, including discrimination, intimidation, or bullying, including cyber sexual bullying, by any employee, independent contractor or other person with which GVA does business, or any other individual, student, or volunteer. This applies to all employees, students, volunteers and relationships, regardless of position or gender. GVA will promptly and thoroughly investigate a complaint of harassment and take appropriate corrective action, if warranted. Inquiries, complaints, or grievances regarding harassment as described in this section, above, should be directed to the GVA Uniform Complaint Procedures (UCP) Compliance Officer:

Brianna deVisser, Vice-Principal (209) 576-2283

Suspected Child Abuse

All GVA staff members are mandated to report any and all known or suspected incidents of child abuse to Child Protective Services (CPS) as soon as practically possible. This mandate represents a legal and ethical responsibility to protect children and ensure that their physical, mental, and emotional needs are met and nurtured. This mandate also aligns with GVA's commitment to ensure that all students are safe, loved, and learning. As such, GVA staff accepts their responsibility as mandated reporters and will act in accordance to this mandate at all times and in all circumstances.

Homeless Students

The term "homeless children and youth" means individuals who lack a fixed, regular and adequate nighttime residence due to economic hardship. It includes children and youths who (42 USC 11434 (a)):

1. Are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting foster care placement;
2. Have a primary nighttime residence that is a public or private place not designed for or ordinarily used as regular sleeping accommodations for human beings;

3. Are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings;
4. Runaway children or children who are abandoned; and
5. Migratory children and unaccompanied youth (youth not in the physical custody of a parent or guardian) may be considered homeless if they meet the above definition of "homeless."

Homeless status is determined in cooperation with the parent or guardian. In the case of unaccompanied youth, status is determined by the School Liaison.

School Liaison

The Chief Executive Officer or designee designates the following staff person, Vice Principal, Brianna deVisser as the School Liaison for homeless students (42 USC 11432(g)(1)(J) & (e)(3)(C).). The School Liaison shall ensure that (42 USC 11432(g)):

1. Homeless students are identified by school personnel and through coordination activities with other entities and agencies.
2. Homeless students enroll in, and have a full and equal opportunity to succeed at Charter School.
3. Homeless students and families receive educational services for which they are eligible, including Head Start and Even Start programs.
4. Parents/guardians are informed of the educational and related opportunities available to their children and are provided with meaningful opportunities to participate in the education of their children.
5. Public notice of the educational rights of homeless children is disseminated at places where children receive services, such as schools, shelter and soup kitchens.
6. Enrollment/admissions disputes are mediated in accordance with law, the Charter School charter and Board policy.
7. Parents/guardians are fully informed of all transportation services as applicable.
8. The School Liaison collaborates with State coordinators and community and school personnel responsible for the provision of education and related services to homeless children and youths.

For any homeless student who enrolls at GVA, a copy of the School's complete policy shall be provided at the time of enrollment and at least twice annually.

Bullying/Harassment

Harassment is a violation of state and federal law as well as Federal Charter School policy. It can take the form of verbal or physical threatening and conduct of a racial or sexual nature. Such behavior will not be tolerated at Great Valley Academy. Examples of harassment include, but are not limited to, vulgar or obscene comments and/or jokes, unwelcome hugging or touching, referring to someone in demeaning terms, starting or spreading demeaning rumors about the life of another individual.

Title IX, Harassment, Intimidation, Discrimination, and Bullying Policy

It is the policy of the State of California to afford all persons in public schools equal rights and opportunities in the educational opportunities of the state, regardless of their disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, association with a person or group with one or more of these actual or perceived characteristics, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of Penal Code (and as amended).

Great Valley Academy Charter School believes that all students have a right to a safe and healthy school environment. Schools and their respective communities have an obligation to promote mutual respect, tolerance, and acceptance.

Great Valley Academy Charter School will not tolerate behavior that infringes on the safety or wellbeing of any student. As used in this policy, "discrimination, harassment, intimidation, and bullying" describe the intentional conduct, including verbal, physical, written communication, or cyberbullying, including cyber sexual bullying, that is based on the actual or perceived characteristics of disability, mental health condition, gender, gender identity, gender expression, nationality, race or ethnicity, religion, religious affiliation, sexual orientation, or

association with a person or group with one or more of these actual or perceived characteristics. In addition, bullying encompasses any conduct described in the definitions set forth in this policy. A student shall not intimidate, harass, discriminate against or bully another student through words or actions. Such behavior includes: direct physical contact, such as hitting or shoving; verbal assaults, such as teasing, threatening, or name-calling; and social isolation or manipulation.

To the extent possible, the Charter School will make reasonable efforts to prevent student from being discriminated against, harassed, intimidated and /or bullied, and will take action to investigate, respond and address any reports of such behaviors in a timely manner. Charter School staff who witness acts of discrimination, harassment, intimidation, and bullying will take immediate steps to intervene, so long as it is safe to do so.

Moreover, the Charter School will not condone or tolerate misconduct prohibited by this Policy by any employee, independent contractor or other person with which Charter School does business, or any other individual, student, or volunteer. This policy applies to all employee, student, or volunteer actions and relationships, regardless of position or gender. Charter School will promptly and thoroughly investigate any complaint of such misconduct prohibited by this Policy and take appropriate corrective action, if warranted.

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

Michael Ruehle (Principal) or Brianna deVisser (Vice-Principal) – (209) 576-2283

Prohibited Unlawful Harassment

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

Prohibited Unlawful Harassment under Title IX

Title IX (20 U.S.C. § 1681 et. seq; 34 C.F.R. § 106.1 et. seq) and California state law prohibit harassment on the basis of sex. In accordance with these existing laws, discrimination on the basis of sex education institutions is prohibited. All persons, regardless of sex, are afforded equal rights and opportunities and freedom from unlawful discrimination in education programs or activities conducted by the Charter School.

GVA is committed to provide a workplace and educational environment free of sexual harassment and considers such harassment to be a major offense, which may result in disciplinary action.

Sexual harassment consists of sexual advances, request for sexual favors and other verbal or physical conduct of a nature when: (a) submission to the conduct is explicitly or implicitly made a term or a condition of an individual's employment, academic status, or progress; (b) submission to, or rejection of, the conduct by the individual is used as the basis or employment or academic decisions affecting the individual; (c) the conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidation, hostile, or offensive work or educational environment; and/or (d) submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

It is also unlawful to retaliate in any way against an individual who has articulated a good faith concern about sexual harassment against him/her or against another individual.

Sexual harassment may include, but is not limited to:

- Physical assaults of a sexual nature
- Unwanted sexual advances, propositions or other sexual comments
- Sexual or discriminatory displays or publications anywhere in the workplace or educational environment

The above list is not to be construed as an all-inclusive list of prohibited acts under this policy.

Prohibited Bullying

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

1. Placing a reasonable pupil* or pupils in fear or harm to that pupil's or those pupil's person or property.
2. Causing a reasonable pupil to experience a substantially detrimental effect on his or her physical or mental health.
3. Causing a reasonable pupil to experience a substantial interference with his or her academic performance.
4. Causing a reasonable pupil to experience a substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by GVA.

*"Reasonable pupil" is defined as a pupil, including, but not limited to, an exceptional needs pupil, who exercises care, skill and judgement in conduct for a person of his or her age, or for a person of his or her age with his or her exceptional needs.

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

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

1. A message, text, sound, video, or image.
2. A post on a social network Internet Web site including, but not limited to:
 - a. Posting to or creating a burn page. A "burn page" means an Internet Website created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - b. Creating a credible impersonation of another actual pupil for the above. "Credible impersonation" means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
 - c. Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
3. An act of "Cyber sexual bullying" including, but not limited to"
 - a. The dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in definition or "bullying," above. A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable for the photograph, visual recording, or other

electronic act.

- b. “Cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.

- 4. Notwithstanding the definitions of “bullying” and “electronic act” above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

Grievance Procedures

Reporting

- GVA Charter School expects students and/or staff to provide appropriate supervision to enforce standards of conduct and, if they observe or become aware of misconduct prohibited by this policy, to immediately report such incidents to the Principal or Vice Principal (who will inform the Principal). For purposes of this policy, the Principal serves as the “Policy Coordinator” for implementation of this policy, and can be reached at (209) 576-2283. Staff members are required to intervene and report as indicated in this policy. This policy applies to students on school grounds, while traveling to and from school or a school-sponsored activity, during the lunch period, whether on or off campus, and during a school-sponsored activity.
- Staff members that witness alleged acts of misconduct prohibited by this policy shall take immediate steps to intervene when safe to do so and call for assistance, as needed. Other members of the school community, including students, parents/guardians, volunteers, and visitors witnessing or experiencing bullying are strongly encouraged to report the incident to the Policy Coordinator; such reporting will not reflect on the target/victim or witnesses in any way.
- Students are expected to immediately report alleged acts of misconduct prohibited by this policy, as well as any other form of teasing or other verbal or physical abuse to the campus Principal or Vice-Principal (within 60 days of occurrence). Any student who feels she/he is a target of such behavior should immediately contact a teacher, counselor, principal, or staff person so that she/he can get assistance in resolving the issue consistent with this policy.
- While submission of a written report is not required, the reporting party is encouraged to use the report form available in the Main Office. However, oral reports shall also be considered. Reports may be made anonymously, but formal disciplinary action cannot be based solely on anonymous information. Complaints regarding such misconduct may also be made to the U.S. Department of Education, Office of Civil Rights.
- GVA Charter School prohibits retaliatory behavior against any complainant or any participant in the complaint process.
- All supervisors of staff will receive sexual harassment training within six (6) months of their assumption of a supervisory position and will receive further training once every two (2) years thereafter. All staff will receive sexual harassment training and/or instruction concerning sexual harassment in the workplace as required by law. Great Valley Academy will also provide staff development training in bullying prevention and cultivate acceptance and understanding in all students and staff members to build each school’s capacity to maintain a safe and healthy learning environment.

Investigation

- Each and every complaint of misconduct prohibited by this policy will be promptly and thoroughly investigated by the Policy Coordinator or designee, upon notification of the complaint. Students can rely on staff to investigate each complaint in the most confidential manner possible under the circumstances.
- At the conclusion of the investigation, the Policy Coordinator or designee will notify the complainant of the outcome of the investigation, including any actions necessary to resolve the incident/situation. However, in no case may the Policy Coordinator or designee reveal confidential student information related to other students, including the type and extent of discipline issued against such students.
- Complaints shall be investigated and resolved within (30) school days, unless circumstances reasonably require additional time.

- All records related to any investigation of misconduct prohibited by this policy will remain in a secure location in the District Office of Great Valley Academy.
- In those instances when the complaint filed under this policy also requires investigation under the Uniform Complaint Procedures, such investigation will be undertaken concurrently.
- The school will make reasonable efforts to keep a report of misconduct by this policy and the results of investigation confidential.

Consequences

- Students or employees who engage in misconduct prohibited by this policy will be subject to disciplinary action.

Uniform Complaint Procedures

- When harassment or bullying is based upon one of the protected characteristics set forth in this policy, a complainant may also fill out a Uniform Complaint procedures (“UCP”) complaint form at any time during the process, consistent with the procedures laid out in this Handbook.

Appeal

- Should the complainant find the Policy Coordinator’s unsatisfactory, he/she may, within five (5) school days, file an appeal with the Designated Appeals Committee. In such cases, at least three (3) certificated School employees who are unfamiliar with the case and who have been previously designated and trained for this purpose shall be assembled to conduct a confidential review of the Complainant’s appeal and render a final decision.

*Teachers should discuss this policy with their students in age-appropriate ways and should assure them that they need not endure any form of bullying, harassment, intimidation, or sex-based misconduct. Students who violate this policy are subject to disciplinary action up to and including expulsion.

Additionally, all staff, students and their parents will receive a summary of this policy prohibiting discrimination, harassment, intimidation, bullying, and violations of Title IX: at the beginning of the school year, as part of the student handbook and/or information packet.

TITLE IX, HARASSMENT, INTIMIDATION, DISCRIMINATION & BULLYING

COMPLAINT FORM

Name: _____ Date: _____

Date of Alleged Incident(s): _____

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

List any witnesses that were present: _____

Where did the incident(s) occur? _____

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

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

Signature of Complainant

Date

Print Name

To be completed by Great Valley Academy:

Received by: _____

Date: _____

Follow up Meeting with Complainant held on: _____

Uniform Complaint Procedure (UCP) Annual Notice

GVA has the primary responsibility to insure compliance with applicable state and federal laws and regulations and has established procedures to address allegations of unlawful discrimination, harassment, intimidation, and bullying; complaints alleging violation of state or federal laws governing educational programs, including the charging of unlawful pupil fees and non-compliance with the Local Control Funding Formula.

GVA shall investigate and seek to resolve complaints using policies and procedures known as the Uniform Complaint Procedure (“UCP”) adopted by our Governing Board. Unlawful discrimination, harassment, intimidation, or bullying complaints may be based on actual or perceived characteristics of age, ancestry, color, ethnic group identification, gender expression, gender identity, gender, genetic information, physical disability, mental disability, medical condition, marital status, nationality, national origin, race or ethnicity, religion, sex, sexual orientation, or on a person’s association with a person or group with one or more of these actual or perceived characteristics, in any GVA program or activity that receives or benefits from state financial assistance.

We are primarily responsible for compliance with federal and state laws and regulations, including those related to unlawful discrimination, harassment, intimidation or bullying against any protected group, and all programs and activities that are subject to the UCP.

Programs and Activities Subject to the UCP (CDE Update 9/2020) - <https://www.cde.ca.gov/re/cp/uc/>

- Child Care and Development Programs
- Compensatory Education
- Consolidated Categorical Aid Programs
- Discrimination, harassment, intimidation, or bullying against any protected group as identified under sections 200 and 220 and Section 11135 of the Government Code, including any actual or perceived characteristic as set forth in Section 422.55 of the Penal Code, or on the basis of a person’s association with a person or group with one or more of these actual or perceived characteristics, in any program or activity conducted by an educational institution, as defined in Section 210.3, that is funded directly by, or that receives or benefits from, any state financial assistance.
- Educational and graduation requirements for pupils in foster care, pupils who are homeless, pupils from military families and pupils formerly in Juvenile Court now enrolled in a school district
- Every Student Succeeds Act
- Local Control and Accountability Plans (LCAP)
- Migrant Education
- Physical Education Instructional Minutes
- Pupil Fees
- School Plans for Student Achievement
- School Safety Plans
- Schoolsite Councils

And any other state or federal educational program the State Superintendent of Public Instruction (SSPI) of the California Department of Education (CDE) or designee deems appropriate.

A complaint of noncompliance with laws relating to pupil fees may be filed pursuant to the local UCP. A pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity. A pupil fee includes, but is not limited to, all of the following:

A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or an extracurricular activity, regardless of whether the class or activity is elective or compulsory, or is for credit.

A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, clothes, or other materials or equipment.

A purchase that a pupil is required to make to obtain materials, supplies, equipment, or clothes associated with an educational activity.

A pupil fee complaint shall not be filed later than one (1) year from the date the alleged violation occurred.

Complaints of noncompliance with laws relating to pupil fees are filed with a Principal of a school. A complaint regarding pupil fees may be filed anonymously if the complaint provides evidence or information to support an allegation of noncompliance with laws relating to pupil fees. Complaints other than complaints relating to pupil fees must be filed in writing.

Complaints alleging discrimination, harassment, intimidation, or bullying, must be filed within twelve (12) months from the date the alleged discrimination, harassment, intimidation, or bullying, occurred or the date the complainant first obtained knowledge of the facts of the alleged discrimination, harassment, intimidation, or bullying, unless the time for filing is extended by the Principal or his or her designee.

Complaints will be investigated and a written Decision or report will be sent to the complainant within thirty (30) days from the receipt of the complaint. This thirty (30) day time period may be extended by written agreement of the complainant. The compliance officer responsible for investigating the complaint shall conduct and complete the investigation in accordance with California regulations and in accordance with GVA's procedures.

The complainant has a right to appeal GVA's Decision to the California Department of Education (CDE) by filing a written appeal within thirty (30) days of receiving the Decision. The appeal must include a copy of the complaint filed with the School and a copy of GVA's Decision.

Civil law remedies may be available under state or federal discrimination, harassment, intimidation, or bullying laws, if applicable. In appropriate cases, an appeal may be filed pursuant to Education Code Section 262.3. A complainant may pursue available civil law remedies outside of GVA's complaint procedures. Complainants may seek assistance from mediation centers or public/private interest attorneys. Civil law remedies that may be imposed by a court include, but are not limited to, injunctions and restraining orders.

A copy of the UCP policy and complaint procedures shall be posted in every classroom and available free of charge in the Main Office. For further information on any part of the complaint procedures, including filing a complaint or requesting a copy of the complaint procedures, please contact the Principal.

*To review the civil rights handbook for the child nutrition program, please visit <http://www.cde.ca.gov/ls/nu/cr/crfactsheet.asp>

Uniform Complaint Procedure Discrimination/Harassment Complaint Reporting Form



In accordance with the Great Valley Academy's Uniform Complaint Procedures (5 CCR 4620) each school shall follow uniform complaint procedures when addressing complaints alleging unlawful discrimination, harassment, intimidation and bullying against any protected group. Protected groups are enumerated by Education Code §§ 200 and 220, It is the policy of the State of California, pursuant to Section 200, that all individuals shall enjoy freedom from discrimination and/or harassment of any kind in the educational institutions of the state. This also includes sexual harassment, which is a form of sexual discrimination (EC § 231.5).

I. Contact Information:

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Home Phone: _____ Work or Cell Phone: _____

II. Complainant

You are filing this complaint on behalf of: ☐ yourself ☐ your child or a (student) ☐ another student ☐ a group
 If filing for someone other than yourself, please provide name, grade and date of birth: _____

III. School Information

School Name: _____
 Principal's Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____

IV. Basis of Complaint:

Please check the following box(es), based on the type(s) of discrimination, harassment, intimidation and bullying you experienced,

For allegation(s) of noncompliance, please check the program or activity referred to in your complaint, if applicable:

- | | |
|---|--|
| <input type="checkbox"/> Education Opportunities to Foster/Homeless Youth | |
| <input type="checkbox"/> Child Care & Development | <input type="checkbox"/> Special Education |
| <input type="checkbox"/> Child Nutrition | <input type="checkbox"/> Migrant Education |
| <input type="checkbox"/> Consolidated Categorical Aid | <input type="checkbox"/> Physical Education Minutes |
| <input type="checkbox"/> Local Control Accountability Plan | <input type="checkbox"/> Pupil Fees for Educational Activities |

For allegation(s) of unlawful discrimination, harassment, intimidation or bullying, please check the basis or the unlawful discrimination, harassment, intimidation or bullying described in your complaint, if applicable:

- | | | | | |
|---|--|--|--|--|
| <input type="checkbox"/> Age | <input type="checkbox"/> Ancestry | <input type="checkbox"/> Color | <input type="checkbox"/> Disability (Mental or Physical) | <input type="checkbox"/> Ethnic Group Identification |
| <input type="checkbox"/> Medical Condition | <input type="checkbox"/> Gender/Gender Expression/Gender Identity | <input type="checkbox"/> Genetic Information | | |
| <input type="checkbox"/> National Origin | <input type="checkbox"/> Race or Ethnicity | <input type="checkbox"/> Religion | <input type="checkbox"/> Sex (Actual or Perceived) | <input type="checkbox"/> Marital Status |
| <input type="checkbox"/> Sexual Orientation (Actual or Perceived) | <input type="checkbox"/> Based on association with a person or group with one or more of these actual or perceived characteristics | | | |

V. Details of Complaint

Please answer the following questions to the best of your ability. Attach additional sheets of paper if you need more space.

Please **describe** the type of incident(s) you experienced that led to this complaint, including the events or actions, in as much detail as possible:

List the **individuals** involved in the incident(s) complaint of:

List any **witnesses** to the incident(s):

Describe the **location where** the incident(s) occurred:

Please list **all the date(s) and times** when the incident(s) occurred or when the alleged acts first came to your attention:

What steps, if any, have you taken to resolve this issue before filing a complaint? Have you spoken with GVA personnel, if so, who and when?

Please provide copies of any written documents that may be relevant and supportive of your complaint. I have attached supporting documents. ☐ Yes ☐ No

Signature of Person Filing Complaint

Date

Print Name

To be completed by Great Valley Academy:

Received by: _____

Date Filed: _____

Title: _____

Please provide a duplicate copy to the complainant.

Where to File a Complaint for Child Nutrition Program

To file a program or Civil Rights complaint, please contact one of the following agencies listed below:

Great Valley Academy
Civil Rights Coordinator
3200 Tully Road
Modesto CA 95350
209-576-2283

Child Nutrition Programs
Civil Rights and Program Complaint Coordinator
California Department of Education
Nutrition Services Division
1430 N Street, Room 4503
Sacramento, CA 95814-2342
916-323-8521 **or** 800-952-5609

or

USDA, Director, Office of Adjudication
1400 Independence Avenue, Southwest
Washington, D.C. 20250-9410
866-632-9992

Federal Relay Service 800-877-8339 (English) or 800-845-6136 (Spanish)

Note: The USDA will investigate and process all complaints of discrimination.

All program complaints filed with the NSD are resolved at the state level. The NSD Complaint Coordinator logs the complaint, refers it to the appropriate program or Field Services Unit, and tracks it through resolution. The NSD reserves the right to conduct unannounced site visits to determine the validity of all allegations.

Wheeled Items Policy

Use of bicycles, skateboards, scooters or other similar vehicles are prohibited on campus during the school year. At the perimeter fence students will dismount and walk. GVA is not responsible for lost or stolen personal items brought to campus.

Rational:

Safety of everyone on campus is a primary value of GVA. Current practice for movement on campus sidewalks are to walk or skip.



Great Valley Academy

Student Use of Technology and Acceptable Use Agreement

New technologies are modifying the way in which information may be accessed, communicated and transferred. Those changes also alter instruction and student learning. The Great Valley Academy Charter School ("Charter School") offers students access to technologies that may include Internet access, electronic mail, and equipment, such as computers, tablets, or other multimedia hardware. The Charter School Governing Board intends that technological resources provided by the school be used in a safe, responsible, and proper manner in support of the instructional program and for the advancement of student learning.

Educational Purpose

Use of Charter School equipment and access to the Internet via Charter School equipment and resource networks is intended to serve and pursue educational goals and purposes. Student use of the Internet is therefore limited to only those activities that further or enhance the delivery of education. Students and staff have a duty to use Charter School resources only in a manner specified in the Policy.

"Educational purpose" means classroom activities, research in academic subjects, career or professional development activities, Charter School approved personal research activities, or other purposes as defined by the Charter School from time to time.

"Inappropriate use" means a use that is inconsistent with an educational purpose or that is in clear violation of this policy and the Acceptable Use Agreement.

Notice and Use

The Charter School shall notify students and parents/guardians about authorized uses of school computers, user obligations and responsibilities, and consequences for unauthorized use and/or unlawful activities. Before a student is authorized to use the Charter School's technological resources, the student and his/her parent/guardian shall sign and return the Acceptable Use Agreement specifying user obligations and responsibilities. In that agreement, the student and his/her parent/guardian shall agree not to hold the Charter School or any Charter School staff responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. They shall also agree to indemnify and hold harmless the Charter School and Charter School personnel for any damages or costs incurred.

Safety

The Charter School shall ensure that all Charter School computers with Internet access have a technology protection measure that blocks or filters Internet access to websites that have no educational purpose and/or contain visual depictions that are obscene, constitute child pornography, or that are harmful to minors. While the Charter School is able exercise reasonable control over content created and purchased by the Charter School, it has limited control over content accessed via the internet and no filtering system is 100% effective. Neither the Charter School nor its staff shall be responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence.

To reinforce these measures, the Director or designee shall implement rules and procedures designed to restrict students' access to harmful or inappropriate matter on the Internet and to ensure that students do not engage in unauthorized or unlawful online activities. Staff shall supervise students while they are using online services and may have teacher aides, student aides, and volunteers assist in this supervision.

The Director or designee also shall establish regulations to address the safety and security of students and student information when using email, chat rooms, and other forms of direct electronic communication.

The Director or designees shall provide age-appropriate instruction regarding safe and appropriate behavior on social networking sites, chat rooms, and other Internet services. Such instruction shall include, but not be limited to, maintaining the student's online reputation and ensuring their personal safety by keeping their personal information private, the dangers of posting personal information online, misrepresentation by online predators, how to report inappropriate or offensive content or threats, behaviors that constitute cyberbullying, and how to respond when subjected to cyberbullying. Students are expected to follow safe practices when using Charter School technology.

Students shall not use the Internet to perform any illegal act or to help others perform illegal acts. Illegal acts include, but are not limited to, any activities in violation of local, state, and federal law and/or accessing information designed to further criminal or dangerous activities. Such information includes, but is not limited to, information that if acted upon could cause damage, present a danger, or cause disruption to the Charter School, other students, or the community. Damaging, debilitating or disabling computers, computer networks or systems through the intentional or overuse of electronic distribution or the spreading of computer viruses or other harmful programs shall be prohibited. Any unauthorized online access to other computers by means of hacking into other computers, downloading hacker tools such as port scanners and password crackers designed to evade restrictions shall also be strictly prohibited.

Student use of Charter School computers to access social networking sites is not prohibited, but access is limited to educational purposes only. To the extent possible, the Director or designee shall block access to such sites on Charter School computers with Internet access. The Director or designee shall oversee the maintenance of the Charter School's technological resources and may establish guidelines and limits on their use.

All employees shall receive a copy of this policy and the accompanying Acceptable Use Agreement describing expectations for appropriate use of the system and shall also be provided with information about the role of staff in supervising student use of technological resources. All employees shall comply with this policy and the Acceptable Use Agreement, in addition to any separate policies governing employee use of technology.

Student use of school computers, networks, and Internet services is a privilege, not a right. Compliance with the Charter School's policies and rules concerning computer use is mandatory. Students who violate these policies and rules may have their computer privileges limited and may be subject to discipline, including but not limited to suspension or expulsion per school policy.

ACCEPTABLE USE

The Charter School believes that providing access to technology enhances the educational experience for students. However, student use of school computers, networks, and Internet services is a privilege, not a right. To make that experience successful for everyone, students must abide by the following terms and conditions:

1. **Security.** Students shall not impair the security of Charter School technology resources. Students are expected to:
 - a. Safeguard all personal passwords. Students should not share passwords with others and should change passwords frequently. Students are expected to notify an administrator immediately if they believe their student account has been compromised.
 - b. Access technology only with their account or with a shared account as directed by their teacher and not to allow others to use their account or to use the accounts of others, with or without the account owner's authorization.
2. **Authorized Use.** Students may use Charter School technology resources when directed by a teacher, when technology has been designated for open student use (e.g., computers in the library), and for other educational purposes.

3. Protection Measures. While the Charter School is able exercise reasonable control over content created and purchased by the Charter School, it has limited control over content accessed via the internet and no filtering system is 100% effective. Neither the Charter School nor its staff shall be responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. The student and parent agree not to hold the Charter School or any Charter School staff responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. They also agree to indemnify and hold harmless the Charter School and Charter School personnel for any damages or costs incurred.

4. Electronic Information Resources (Internet). The Charter School recognizes the importance of providing student's access to Electronic Information Resources (Internet) in order to enhance and support age and grade appropriate school adopted instructional goals and standards. It is the Charter School's intent to protect students from inappropriate information but school personnel cannot screen all materials available on the Internet. Willful access to inappropriate material is a violation of school policy and may result in the revocation of network privileges and other disciplinary action consistent with the law and designated school rules.

Guidelines for Use of Electronic Resources (Internet)

- a. Be Polite: Never send or encourage others to send messages that are not polite. Use electronic resources wisely. Log off when you are finished.
- b. Use Appropriate, Respectful Language: In your messages, always use language that you know is appropriate and respectful.
- c. Privacy: Do not send any message that includes personal information such as your name, home address or phone number of yourself or any other person.
- d. Misuse: Report any misuse on the Internet to your teacher/principal.
- e. Electronic Mail (E-mail): Use e-mail for educational purposes only.
- f. Vandalism: Never move, delete, or trash any applications or files that are not yours.
- g. Information: Some information accessed by the use of electronic services may or may not be accurate. The Charter School makes no guarantees of any kind concerning the accuracy of information obtained online

5. Inappropriate Use. Charter School technology, hardware, software and bandwidth are shared and limited resources and all users have an obligation to use those resources responsibly. Students are provided access to the Charter School technology primarily for educational purposes. Students shall not use Charter School technology or equipment for personal activities or for activities that violate school policy or local law. These include but are not limited to:

- a. Playing games or online gaming.
- b. Downloading software, music, movies or other content in violation of licensing requirements, copyright or other intellectual property rights.
- c. Installing software on Charter School equipment without the permission of a teacher or other authorized Charter School staff person.
- d. Downloading, viewing or sharing inappropriate content, including pornographic, defamatory or otherwise offensive material.
- e. Conducting any activity that is in violation of school policy, the student code of conduct or local, state or federal law.
- f. Engaging in any activity that is harmful to other student(s), including the use of technology to harass, intimidate, bully or otherwise disrupt the educational process.
- g. Participating in political activities.
- h. Conducting for-profit business.
- i. Using hacking tools on the network or intentionally introducing malicious code or viruses into the Charter School's network.
- j. Using any software or proxy service to obscure either the student's IP address or the sites that the student visits.
- k. Disabling, bypassing, or attempting to disable or bypass any system monitoring, filtering or other security measures.

I. Accessing or attempting to access material or systems on the network that the student is not authorized to access.

6. No Expectation of Privacy. Student acknowledges that computer equipment, Internet access networks, email accounts, and any other technology resources are owned by Charter School and provided to students for educational purposes. The Charter School may require staff to monitor and supervise all access to computer equipment, Internet access networks, and email accounts. To facilitate monitoring of activities, computer screens may be positioned so that they are visible to the staff member supervising the students. The Charter School reserves the right to access stored computer records and communications, files, and other data stored on Charter School equipment or sent over Charter School networks. Such communications, files, and data are not private and may be accessed during routine system maintenance; during inspection of Charter School equipment at the end of the school year/term or agree to use period; and review of individual files or monitoring of individual activity when there is a reasonable suspicion that the student is engaging in an inappropriate use.

7. Disruptive Activity. Students should not intentionally interfere with the performance of the Charter School's network or intentionally damage any Charter School technology resources.

8. Unauthorized Networks. Students may not create unauthorized wireless networks to access the Charter School's network. This includes establishing wireless access points, wireless routers and open networks on personal devices.

9. Technology Systems/Equipment Care. Students are not permitted to have food or drink near computers/other technology and must keep equipment and assigned areas free of vandalism.

10. Consequences of Inappropriate Use. Students who violate this Agreement will be subject to discipline which may include loss of access to Charter School technology resources and/or other appropriate disciplinary or legal action in accordance with the Student Code of Conduct and applicable laws.

11. Google Suite for Education. Students will have access to and use G Suite for Education. G Suite for Education is a set of education productivity tools from Google Education Core including Gmail, Calendar, Docs, Classroom, and more used by tens of millions students and teachers around the world. Great Valley Academy students will use their G Suite accounts to complete assignments, communicate with their teachers, sign in their Chromebooks, and learn 21st century digital citizenship skills. For information on privacy regarding G Suite for Education, please visit https://gsuite.google.com/terms/education_privacy.html. By agreeing to the Student Use of Technology and Acceptable Use Agreement, you are providing permission for your student to use a G Suite for Education account.

After reading the Student Use of Technology Policy and the Acceptable Use Agreement, please complete the acknowledgement form to indicate your agreement with the terms and conditions provided. The signatures of both the student and parent/guardian are required before access may be granted to the technologies available. This document, which incorporates the Use Procedure, reflects the entire agreement and understanding of all parties.



2022-23 Student/Parent Handbook

Great Valley Academy (Salida Campus)
5901 Sisk Road
Modesto, CA 95356
Phone: 209-545-7500

www.greatvalleyacademy.com

Board Approval – Pending

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Mission and Core Philosophy

Vision

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

Mission

Great Valley Academies create a safe, loved, environment where all students develop foundational thinking skills and positive character traits to achieve their greatest potential.

Philosophy

At Great Valley Academy, we believe:

- Every child is unique and can learn like a gifted learner – visually.
- Students deserve the opportunity to have instruction delivered in a way that is relevant and meaningful.
- School should be a non-threatening environment that emphasizes relationships.
- Character education should be taught, modeled, and assessed.
- Highly-trained, motivated teachers are essential.
- Parental involvement and support is an essential element of a quality educational experience.

Great Valley Academy's inquiry-based curriculum will help students become self-motivated, competent, lifelong learners who are critical thinkers; demonstrating confidence and creativity. We believe that all students can achieve high standards even though they may enter Great Valley Academy with different strengths, abilities, and life experiences.

5 Pillars

1. Great Valley Smart (GVS)

GVA trains the brain, unlocking gifted learning through the utilization of visual strategies and purposeful movement.

2. Character Development

GVA equips students to become caring and responsible citizens through choice theory, character reflection, and assessment.

3. Climate: Safe, Loved, Learning

GVA nurtures a community where all are safe, loved, and learning.

4. Mastery Learning

GVA empowers students to influence the pace and content of their academic experience through the demonstration of mastery.

5. Highly Qualified and Dedicated Staff

GVA develops a highly-dedicated team through extensive and interactive hiring practice and continuous professional growth.

2022 - 2023 Student Calendar – Subject to Change

August	1-8	Staff Training Days
August	9	First Day of School
September	5	Labor Day – No School
September	TBD	Kindergarten Extension Begins
September	16	Teacher In-Service – No School
October	10-14	Fall Break – No School
November	11	Veterans Day – No School
November	23-25	Thanksgiving Vacation – No School
December	19-30	Winter Vacation – No School
January	2	Winter Vacation – No School
January	16	Martin Luther King's Birthday – No School
February	13	Teacher In-Service – No School
February	20	Presidents' Day – No School
March	20-24	Spring Break – No School
April	7-10	Spring Holiday – No School
May	5	Teacher In-Service – No School
May	29	Memorial Day – No School
June	2	Last Day of School

School Hours

Monday – Thursday (Morning Start Times)

<u>Grade Level</u>	<u>Start Time</u>
Kindergarten AM	8:30am
1 st – 8 th	8:30am
Kindergarten PM	12:10pm

Monday – Thursday (Ending Times)

<u>Grade Level</u>	<u>End Time</u>
Kindergarten AM	11:50am
Kindergarten PM	3:30pm
1 st – 8 th	3:30pm

Friday (Morning Start and Ending Times)

<u>Grade Level</u>	<u>Start and End Times</u>
K – 8 th	8:30am – 12:00pm

Student Wellness

We are committed to the optimal development for every student. The school wellness policy outlines GVA's approach to ensuring supportive environments and opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. The GVA wellness policy can be found in the main campus office or on the home page of our website at www.greatvalleyacademy.com.

Breakfast

Breakfast is served during morning recess. GVA contracts with Revolution Foods for healthy options for your child. For more information, go to www.greatvalleyacademy.com.

Lunch

Students will eat in their classroom, family-style, with their teachers. Teachers use this time to chat with students, teach good table manners, conduct conferences with students, as well as eat.

Students may either bring a lunch from home, or they may receive a lunch through our lunch program. Students will not have access to a microwave. GVA contracts with Revolution Foods for healthy options for your child. For more information, go to www.greatvalleyacademy.com.

Students who forget their lunch may call home to have a lunch brought to the office. The office is not responsible for lunches not picked up by the student. Meal delivery services (i.e. Grub Hub, Door Dash) should not be used to bring your student lunch. GVA desires that all students receive a lunch, if you are unable to deliver a lunch, please make sure your student has checked with Food Services regarding the availability of a lunch.

Free and Reduced-price qualifying students must apply each year and receive notification from the Great Valley Academy Food Services program. Information can be found at www.greatvalleyacademy.com.

Snacks

Students in grades 1st-8th will have a snack in the morning and afternoon. We ask **parents to provide** their child with **two healthy snacks each day**. AM/PM Kindergarten students need to also have a snack. If you have a PM Kindergarten please make sure they have lunch before coming to school.

Water Bottles

We encourage students to drink water throughout the day by keeping reusable water bottles with them at all times while they are in school. GVA has refilling stations on campus to reduce plastic waste.

Uniforms

Students and staff at Great Valley Academy will wear uniforms daily. We have chosen uniforms because they:

- Allow students and staff to focus on learning.
- Improve the safety and security of the school.
- Improve behavior and discipline in the school.
- Help develop a sense of unity.
- Ensure that appropriate clothing will be worn to school.
- Emphasize the individuality of each child.

GVA Administration reserves the right to address, at their discretion, uniform issues that present themselves as a distraction to the students, the educational process or prevent student safety.

Required Uniform - K-6 Grades

Bottoms

- Black or khaki color straight, jean/denim or cargo pants/shorts.
- Black or khaki color capris, skirts, skorts and jumpers. Must be no shorter than the end of a students' fingertips when their arms are down at their sides – both front and back.
- Bottoms must be plain material without designs or patterns. No decorative holes, rips or tears. Yoga, sweat pant, athletic (workout) styles are not allowed.
- Leggings/tights may only be worn under skirts, skorts, shorts and jumpers and must be solid white, black, grey or navy.
- All bottoms must allow non-restrictive movement.
- All bottoms must be worn at the waist and not excessively baggy; at no time should undergarments show.

Tops

- Solid dark green, collared polo shirt with a white embroidered Great Valley Academy logo on the left side chest.
- Solid white, collared button-up dress shirt or blouse with green or maroon embroidered Great Valley Academy logo on the left side chest.
- All tops must have either short or long sleeves.
- All tops must allow non-restrictive movement.
- Undershirts that extend past the uniform shirt (sleeves and bottom of shirt) must be solid white, black, navy, grey, or dark green.
- Solid navy blue sweatshirts, sweaters and jackets with a white embroidered Great Valley Academy logo on the left side chest are allowed to be worn inside.
- Great Valley Academy sponsored sweatshirts and jackets may be worn inside.
- All non-navy and non-sponsored sweatshirts, sweaters and jackets may be worn outside but must be removed when inside.

Required Uniform - 7th & 8th Grades

Bottoms

- Black or khaki color straight, jean/denim or cargo pants/shorts.
- Black or khaki color capris, skirts, skorts and jumpers. Must be no shorter than the end of a students' fingertips when their arms are down at their sides – both front and back.
- Bottoms must be plain material without designs or patterns. No decorative holes, rips or tears. Yoga, sweat pant, athletic (workout) styles are not allowed.
- Leggings/tights may only be worn under uniform skirts, skorts, shorts and jumpers must be solid white, black, grey or navy.
- All bottoms must allow non-restrictive movement.
- All bottoms must be worn at the waist and not excessively baggy; at no time should undergarments show.

Tops

- Solid maroon, collared polo shirt with a white embroidered Great Valley Academy logo on the left side chest.
- Solid white, collared button-up dress shirt or blouse with maroon or green embroidered Great Valley Academy logo on the left side chest.
- All tops must have either short or long sleeves.
- All tops must allow non-restrictive movement.
- Undershirts that extend past the uniform shirt (sleeves and bottom of shirt) must be solid white, black, navy, grey, or maroon.
- Solid navy blue sweatshirts, sweaters and jackets with a white embroidered Great Valley Academy logo on the left side chest are allowed to be worn inside.

- Great Valley Academy spirit sweatshirts and jackets may be worn inside.
- All non-navy and non-spirit sweatshirts, sweaters and jackets may be worn outside but must be removed when inside.

Required Uniform – All Students

Friday Spirit Days

- Every Friday students may wear school spirit shirts that include but are not limited to jog-a-thon, athletics, Kids Care, grade level designs, performing arts, music, etc.
- Periodically each campus will announce dress-up or special spirit days. Details for these days will be outlined in campus newsletters and/or announcements.

Shoes

- Athletic shoes must be worn at all times. Students will be involved in fitness/movement activities throughout the day and thus shoes must be well fitting and secured at all times.
- No sandals, flip-flops, open-toed shoes, wedged tennis shoes, shoes with heels or wheels, slip-on shoes (i.e. Vans, Toms) or boots. Rain boots are permitted on rainy days only but athletic shoes must be brought to put on once inside.



Head Coverings

- Hats, beanies and other head coverings may be worn outside only and in a practical manner as to block eyes from the sun or to keep warm.
- Head coverings worn for religious reasons are allowed.

Appearance/Accessories/Hair

Please keep in mind the intent of the uniform policy is for students to have a simple, professional and unified appearance – both in clothing and personal appearance. The focus at GVA is on learning. Our ultimate guide for clothing and appearance is to be sure it does not distract from learning. We are preparing students for professional careers and professional appearance is important.

- Excessive and/or extreme jewelry, such as chains or spikes, are not allowed.
- Ear and facial piercings are allowed to the extent that they do not cause a distraction or create a safety concern for the student or others. Body piercings may not be visible.
- Extreme and/or excessive make-up is not allowed.
- Visible tattoos are not allowed.
- Great Valley Academy does not have a hair length requirement but it is important that students are able to make eye contact, so hair must not cover the eyes.
- Clothing should be free of rips and tears or reasonably mended.
- Clothing should be kept clean without excessive stains and discoloration.

Purchasing Uniforms

You may purchase uniforms directly from Great Valley Academy. Visit the online store at www.gvauniformstore.com.

In addition to Great Valley Academy, uniform apparel may be purchased from major retailers for convenience. Uniform top embroidery may be done at the following Great Valley Academy approved establishments:

- Margo's Logo – 3616 Morristown Rd. Modesto – (209) 571-3413
- J & J Printing – 129 W. Yosemite Ave. Manteca – (209) 239-9567

Uniform Policy Enforcement

1st incident: Parent is informed that their child is out of uniform. Parent reviews the policy and agrees to correct uniform issue the next day.

2nd incident: Student is sent to the school office. Parent is contacted to bring appropriate clothing right away. Student returns to class until their parent arrives.

3rd incident: Student is sent to the school office. Parent is contacted for one-on-one meeting to address policy adherence and to bring appropriate clothing right away. Student remains in the office until parent arrives. GVA may offer any reasonable assistance necessary to ensure the student adheres to the school uniform policy.

GREAT VALLEY ACADEMY ATTENDANCE POLICY POLICY NO. [Attend082015]

Please call, text or email our office at (209) 218-6161 or salida.attendance@greatvalleyacademy.com by 8:30am on the day of the absence, tardy or if the student will be leaving early. Please leave a voicemail if you all after school hours. Please provide us your child's name, teacher and reason for absence. Absences must be reported within 5 days of the absence to avoid being considered truant.

It is the intent of the governing Board of the Great Valley Academy ("Charter School") to ensure that students attend school every day on time. Consistent school attendance is critical to school success. Being present for classroom instructional time is essential for students to reach their goals and achieve their dreams. Chronic absenteeism has been linked to an increased likelihood of poor academic performance, disengagement from school and behavior problems.

Excused Absences for Classroom Based Attendance

Absence from school shall be excused only for health reasons, family emergencies and justifiable personal reasons, as permitted by law or Board policy.

A student's absence shall be excused for the following reasons:

1. Personal illness
2. Quarantine under the direction of a county or city health officer
3. Medical, dental, optometric, or chiropractic appointments
4. Attendance at funeral services for a member of the immediate family:
 - a. Excused absence in this instance shall be limited to one day if the service is conducted in California or three days if the service is conducted out of state.
 - b. "Immediate family" shall be defined as mother, father, grandmother, grandfather, spouse, son/son-in-law, daughter/daughter-in-law, brother, sister or any relative living in the student's immediate household.
5. Participation in religious instruction or exercises in accordance with Charter School policy:
 - a. The student shall be excused for this purpose on no more than four school days per month.

In addition, a student's absence shall be excused for justifiable personal reasons such as:

1. Appearance in court
2. Attendance at a naturalization ceremony
3. Attendance at a funeral
4. Observation of a holiday or ceremony of his/her religion
5. Attendance at religious retreats for no more than four hours during a trimester

Method of Verification

When students who have been absent return to school, they must present a satisfactory explanation verifying the reason for the absence. The following methods may be used to verify student absences:

1. Signed, written note from parent/guardian, parent representative;
2. Conversation, in person or by telephone, between the verifying employee and the student's parent/guardian or parent representative. The employee shall subsequently record the following:
 - a. Name of student
 - b. Name of parent/guardian or parent representative
 - c. Name of verifying employee
 - d. Date or dates of absence
 - e. Reason for absence
3. Visit to the student's home by the verifying employee, or any other reasonable method, which establishes the fact that the student was absent for the reasons stated. A written recording shall be made, including information outlined above.
4. Healthcare provider verification
 - a. When excusing students for confidential medical services or verifying such appointments, Charter School staff shall not ask the purpose of such appointments but may contact a medical office to confirm the time of the appointment.
 - b. A healthcare provider's note of illness will be accepted for any reported absence. When a student has had 14 absences in the school year for illness verified by methods listed in #1-#3 above without a healthcare provider's note, any further absences for illness must be verified by a healthcare provider.

Insofar as class participation is an integral part of students' learning experiences, parents/guardians and students shall be encouraged to schedule medical appointments during non-school hours.

Students should not be absent from school without their parents/guardians' knowledge or consent except in cases of medical emergency. Student absence for religious instruction or participation in religious exercises away from school property may be considered excused subject to administrative regulations and law.

Unexcused Absences/Truancy for Classroom Based Attendance

Students shall be classified as truant if the student is absent from school without a valid excuse three full days in one school year, or if the student is tardy or absent for more than any 30-minute period during the school day without a valid excuse on three occasions in one school year, or if the student is tardy or picked up early for any length of time during the school day without a valid excuse on five occasions in one school year, or any combination thereof. Such students shall be reported to the Principal or designee. Adopted/Ratified: [September 28, 2015] Revision Date: 3

In addition, students shall be classified as a chronic truant if the student is absent from school without a valid excuse for 10 percent or more of the school days in one school, from the date of enrollment to the current date.

The Principal, or designee, shall implement positive steps to reduce truancy, including working with the family in an attempt to resolve the attendance problem. A student's progress and learning may be affected by excessive unexcused absences. In addition, the Charter School is fiscally dependent on student attendance and is negatively impacted by excessive unexcused absences. If all attempts to resolve the student's attendance problem are unsuccessful, the Charter School will implement the processes described below.

Process for Upholding the Attendance Policy

First Day of School Process

When students are not in attendance on the first five (5) days of school, the Charter School will attempt to reach the parent/guardian on a daily basis for each of the first five days to determine whether the student has an excused absence, consistent with the process outlined in this policy. If the student has a basis for an excused absence, parents must notify the school of the absence and provide documentation consistent with this policy. However, consistent with process below, students who are not in attendance due to an unexcused absence by the fifth day of school will be dis-enrolled from the school roster, as it will be assumed that the student has chosen another school option.

1. Students who are not in attendance on the first day of school will be contacted by phone to ensure their intent to enroll.
2. Students who have indicated their intent to enroll, but have not attended by the third day will receive a letter indicating the student will be dis-enrolled after the fifth day of school if the student has not attended school without valid excuse.
3. Students who have indicated their intent to enroll, but have not attended by the fifth day will receive a phone call reiterating the content of the letter.
4. Students who have not attended by the sixth day, and do not have an excused absence as defined above for not being in attendance will be dis-enrolled from the roster.
5. The School will use the contact information provided by the parent/guardian in the registration packet.
6. The District of Residence will be notified of the student's failure to attend Charter School and the disenrollment.

Truancy Process

1. Each of the first two (2) unexcused absences will result in a call home to the parent/guardian by the Principal or designee. The student's classroom teacher may also call home.
2. Each of the third (3rd) and fourth (4th) unexcused absences will result in a call home to the parent/guardian by Principal or designee. In addition, the student's classroom teacher may also call home and/or the School may send the parent an e-mail notification. In addition, upon reaching three (3) unexcused absences or three (3) over 30 minute unexcused tardies in a school year, the parent/guardian will receive "Truancy Letter #1" from the school. This letter must be signed by the parent/guardian and returned to the school. This letter shall also be accompanied by a copy of this Attendance Policy. This letter, and all subsequent letter(s) sent home, shall be sent by Certified Mail, return receipt requested, or some other form of mail that can be tracked.
3. Upon reaching seven (7) unexcused absences including unexcused tardies, the parent/guardian will receive "Truancy Letter #2 – Conference Request," and a parent/guardian conference will be scheduled to review the student's records and develop an intervention plan/contract.
4. Upon reaching ten (10) unexcused absences including unexcused tardies, the student will be referred to a Student Success Team (SST) and the School Attendance Review Team (SART). In addition, the parent/guardian will receive a "Habitual Truancy Re-classification Letter #3," and may be asked/invited to attend an evening assembly for parents/guardians of chronically absent students.
5. The SART panel will be composed of the Principal, and other staff members as deemed necessary. The SART panel will discuss the absence problem with the Parent/Guardian to work on solutions, develop strategies, discuss appropriate support services for the student and his/her family, and establish a plan to resolve the attendance issue.
 - a. The SART panel shall direct the parent/guardian that no further unexcused absences or tardies can be tolerated.
 - b. The parent shall be required to sign a contract formalizing the agreement by the parents to improve the child's attendance or face additional administrative action. The contract will identify the corrective actions required in the future, and indicate that the SART panel shall
 - c. The SART panel may discuss other school placement options.
 - d. Notice of action recommended by the SART will be provided in writing to the parent/guardian. have the authority to order one or more of the following consequences for non-compliance with the terms of the contract:
 - i. Student retention
 - ii. Required school counseling
 - iii. Loss of field trip privileges
 - iv. Loss of school event privileges
 - v. Required remediation plan as set by the SART
 - vi. Notification to the District Attorney
6. If the conditions of the SART contract are not met, the student may incur additional administrative action up to and including disenrollment from the school and notification of the disenrollment sent to the student's district of residence.

7. For all communications set forth in this process, the Charter School will use the contact information provided by the parent/guardian in the registration packet. It is the parent's or guardian's responsibility to update the Charter School with any new contact information.
8. If student is absent ten (10) or more consecutive school days without valid excuse and parent/guardian cannot be reached at the number or address provided in the registration packet and does not otherwise respond to the Charter School's communication attempts, as set forth above, the student will be in violation of the SART contract, and the SART panel will recommend that the student be deemed to have voluntarily dis-enrolled and notification of the disenrollment be sent to the student's district of residence.

Removal from Charter School

If, after the above procedures have been followed, the student continues to have unexcused absences, the parent/guardian may receive notice that the student is in violation of the SART contract. The student will then be required to appear before the SART panel again to discuss the unexcused absences. After such meeting, or after reasonable attempts by the SART panel to schedule the meeting if the parent/guardian is nonresponsive, the SART panel may recommend that the student be deemed to have voluntarily dis-enrolled from the Charter School. The parent will receive written notice of the SART panel's recommendation.

The SART panel shall then forward its recommendation to the Governing Board for review of the matter and final decision. The parent/guardian will receive written notice of the date and time of the Governing Board review. Such notice shall be sent at least five (5) days prior to the Board review. The Board's decision shall be final as to that recommendation.

If there is a Board decision to dis-enroll, notice will be sent to the student's district of residence within thirty (30) days.

A Board decision not to dis-enroll the student does not prevent the SART panel from making a similar recommendation in the future.

Referral to Appropriate Agencies or County District Attorney

It is the Charter School's intent to identify and remove all barriers to the student's success, and the School will explore every possible option to address student attendance issues with the family. For any unexcused absence, the Charter School may refer the family to appropriate school-based and/or social service agencies.

If a child's attendance does not improve after a SART contract has been developed according to the procedures above, or if the parents fail to attend a required SART meeting, the Charter School shall notify the District's Attorney's office, which then may refer the matter for prosecution through the court system. Students 12 years of age and older may be referred to the juvenile court for adjudication.

These policies will be enforced fairly, uniformly, and consistently without regard to the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code or association with an individual who has any of the aforementioned characteristics).

Reports

The Principal, or designee, shall gather and report to the Board the number of absences both excused and unexcused as well as students who are truant, and the steps taken to remedy the problem.

Coming Late or Leaving School Early

When a child comes to school late or leaves early, it puts the child in a poor position to learn and sets a bad example for the entire class. It is important to arrive at school on time and stay until dismissal to maximize learning potential, develop positive work ethic, and show respect for all other students.

If your child arrives late to school, you must check in at the office to sign your student(s) in prior to your child going to his/her classroom in order to receive the appropriate pass.

Because of our concern for the safety of our students, no student is to leave the school grounds at any time without permission from the office. **Parents must check in at the school office** when picking up their child before dismissal.

The following guidelines will apply:

- Leaving early will be determined excused or unexcused by the same criteria used for attendance.
- Children will be released only to the people listed on the emergency card.
- Written permission from parent/guardian will be required for children to be released to someone not on the emergency card.
- The person to whom the child is to be released will be required to sign a log in the school office indicating time of the release.
- Identification will be required if the person is not known to the office staff.
- Teachers may release a child to an adult only after receiving notification from the principal or secretary.
- No child will be permitted to leave school alone during school hours.
- A parent/guardian or authorized adult must pick up the child inside the school.

Independent Study

If you know your student is not going to be at school for more than three days due to family vacation, religious instruction or extended illness, you may request an independent study packet from your teacher for your child.

All requests for independent study **MUST** go through the teacher and **need to be at least two weeks** (if possible) **in advance** of their absence. If the teacher has concerns granting the independent study for a particular student, the teacher will forward the request to administration for review and determination. This allotted time is needed to collect work and make sure all paperwork is signed properly. Independent study is a way for your student to stay up to date with their classroom work while being absent from school. It also helps our school maintain our Average Daily Attendance. Initial independent study requests will not be granted for more than 30 school days. Subsequent requests will require meeting with the school administration to determine longer term needs of the student.

Attendance Awards

Perfect Attendance: No absences for any reason, no tardies, and no independent studies for the school year.

GVA Parking Lot Procedures

Please see the Drop Off and Pick Up Procedures and Maps at the end of the handbook.

Morning Drop-off Times

We ask that as many parents as possible use the Drop Off Zone in the morning. Please see the detailed procedure at the end of the handbook.

❖ **AM K-8th 8:05 AM – 8:30 AM**

**All classrooms open at 8:05 AM to accept children.*

** School begins at 8:30am so if arriving at this time, your student is considered tardy and must sign in with the office.*

❖ **PM K 12:00 PM-12:10 PM**

***(parents needs to walk children to classroom, Drop Off Zone is closed at this time).**

The school office opens daily at 8:05am.

We have a specific drop-off and pick-up plan that everyone must adhere to. Please follow the AM drop off procedure, attached to the back. If you choose not to make use of the Drop Off Zone for AM drop off, feel free to park and walk your child to class. The parking lot is not a place for children to walk by themselves; it is not safe.

PM Pick Up

K – 6th graders must be picked up by a parent, guardian, or someone on the emergency card at the classroom. 7th – 8th graders may leave the classroom without an adult picking them up. They may not pick up younger siblings.

Curbside pick up

If you have a daycare pick up, or will need assistance (carpool, disabled, pregnant, elderly, newborn or medical) on a daily basis, or have 3 or more GVA students, there is an option for you. Please see the email sent out about curbside to make a request. Curbside is meant to help those mentioned above, to keep cars moving in the parking lot, and to help reduce the number of cars parking in the lot at the end of the day, special event days (Jog a thon, YE party, etc). Curbside may be canceled, and notifications will be made as such.

Requests for curbside will be distributed just before the school year starts and curbside will not begin until two weeks after the first day of school. If your student is enrolled after the first day of school, contact the office for a request form. There are a limited number of students who may participate in curbside. Kindergarteners may not participate in curbside.

Classroom Celebrations and Activities

Celebrations will occur at various times and for various reasons throughout the year. Please check ParentSquare or with your student's teacher for information. When celebrating specific holidays, Great Valley Academy will attempt to respect the beliefs of all families. Please contact your child's classroom teacher if you would like to share information regarding your family's beliefs. **Birthdays** - Please contact your child's teacher regarding birthday celebrations.

Emergency Contacts/Registration Card

If your child is injured or becomes ill at school, we will make every effort to contact you. Please be sure that your emergency contact information on your Student Registration Card is filled out completely and accurately. Also make sure that it is on file in the school office so we may reach you at home or work. The registration card should also list the names and numbers of at least two people we can call if we are unable to contact you. Please be sure that the people you list as emergency contacts are aware of this and are willing and able to take responsibility for your child. **Please update the information as any changes occur.**

Illness

To protect the health of your child and other students, we expect children to be picked up from school if they have a **fever of 100.4 or above, rash, head lice, or similar communicable symptoms**. Please notify the school if your child has been diagnosed with a communicable disease, and keep the student home until fully recovered. A student should be fever free and not vomited for 24 hours before returning to school.

Immunizations

Pursuant to the California Health and Safety Code and the California Code of Regulations, children must have a minimum number of immunizations (shots) before they can attend school. Immunization records will be required for all incoming students. Verification of immunizations will be completed with written medical records from the child's doctor or immunization clinic. To ensure a safe learning environment for all students, the Charter School follows and abides by the health standards set forth by the state of California. Students will not attend school until all required records have been received. The immunization status of all students will be reviewed periodically. Those students who do not meet the State guidelines may be excluded from school until the requirements are met. Students who have been exposed to a communicable disease for which they have not been immunized may be excluded from school at the discretion of the Charter School.

These required immunizations include:

Child's Grade	List of shots required to attend school
Entering Kindergarten	<p>Diphtheria, Pertussis, and Tetanus (DTaP) - Five (5) doses Polio - Four (4) doses</p> <p>Measles, Mumps, and Rubella (MMR) - Two (2) doses Hepatitis B (Hep B) - Three (3) doses</p> <p>Varicella (chickenpox) – Two (2) doses</p> <p>NOTE: Four doses of DTaP are allowed if one was given on or after the fourth birthday. Three doses of Polio are allowed if one was given on or after fourth birthday. MMR doses must be given on or after first birthday.</p>
Entering 7 th Grade	<p>Tetanus, reduced Diphtheria, and acellular Pertussis (Tdap) - One (1) dose</p> <p>Varicella - Two (2) doses</p> <p>NOTE: In order to begin 7th grade, students who had a valid personal belief exemption on file with a public or private elementary or secondary school in California before January 1, 2016 must meet all requirements for children 7-17 years old (i.e., polio, MMR, chickenpox and primary series for diphtheria, tetanus, and pertussis), in addition to the 7th grade requirements for Tdap and two (2) doses of Varicella.</p>

A copy of Great Valley Academy's full Immunization Policy is available in the School Office.

Medication

GVA staff is responsible for overseeing the administration of medication to students attending GVA during regular school hours, including before or after-school programs, field trips, extracurricular or co-curricular activities, and camps or other activities that typically involve at least one overnight stay from home. It is imperative that practices followed in the administration of medication be carefully delineated to ensure the safety of our students and the legal protection of our employees. Any pupil who is required to take, during the regular school day medication prescribed for him or her by a physician or surgeon, or ordered for him or her by a physician assistant practicing in compliance with Chapter 7/7 (commencing with Section 3500) of Division 2 of the Business and Professions Code, may be assisted by the school nurse or designated school personnel or may carry and self-administer prescription auto-injectable epinephrine if GVA receives the appropriate written statements as follows:

1. In order for a pupil to carry and self-administer prescription auto-injectable epinephrine, GVA shall obtain both a written statement from the physician or surgeon or physician assistant detailing the name of the medication, method, amount, and time schedules by which the medication is to be taken, and confirming that the pupil is able to self-administer auto-injectable epinephrine and a written statement from the parent, foster parent or guardian of the pupil consenting to the self-administration, providing a release for the school nurse or designated school personnel to consult with the health care provider of the pupil regarding any questions that may arise with regard to the medication, and releasing GVA and school personnel from civil liability if the self-administering pupil suffers an adverse reaction as a result of self-administering medication.
2. Additionally, the school nurse or trained personnel who have volunteered may use epinephrine auto-injectors to provide emergency medical aid to persons suffering or reasonably believed to be suffering from an anaphylactic reaction. GVA will ensure it has the appropriate type of epinephrine auto-injector on site (i.e. regular or junior) to meet the needs of its pupils. GVA will ensure staff properly store, maintain, and restock the epinephrine auto-injectors as needed.

3. GVA will ensure any school personnel who volunteer are appropriately trained regarding the storage and emergency use of epinephrine auto-injectors based on the standards developed by the Superintendent of Public Instruction. GVA will distribute an annual notice to all staff describing the request for volunteers who will be trained to administer an epinephrine auto-injector to person if that person is suffering or reasonably believed to be suffering from anaphylaxis. The annual notice shall also describe the training the volunteer will receive.
4. In order for a pupil to be assisted by the school nurse or other designated school personnel in administering medication other than emergency epinephrine auto-injectors, or inhaled asthma medications, GVA shall obtain both a written statement from the physician or surgeon or physician assistant detailing the name of the medication, method, amount, and time schedules by which the medication is to be taken and a written statement from the parent, foster parent, or guardian of the pupil indicating the desire that GVA assist the pupil in the matters set forth in the statement of the physician or surgeon or physician assistant.

Guidelines:

- The primary responsibility for the administration of medication rests with the parent/guardian, student and medical professional.
- Medication shall be administered only during school hours if determined by a physician to be necessary.
- Medication must be in original packaging.
- For prescribed medication, the medication must be prescribed and labeled with the student's name.
- Designated staff shall keep records of medication administered at GVA.
- All medication will be kept in a secure and appropriate storage location and administered per physician's instructions by appropriately designated staff.
- Designated staff shall return all surplus medication to the parent/guardian upon completion of the regimen or prior to extended holidays.
- Designated staff shall establish emergency procedures for specific medical conditions that require an immediate response (i.e. allergies, asthma, diabetes).
- The written statements specified in this policy shall be provided at least annually and more frequently if the medication, dosage, frequency of administration or reason for administration changes.
- A pupil may be subject to disciplinary action if that pupil uses auto-injectable epinephrine in a manner other than as prescribed.
- Any pupil requiring insulin shots must establish a plan for administration of insulin shots with the Executive Director in consultation with the parent or guardian and the pupil's medical professional.

Head Lice

Great Valley Academy recognizes that head lice infestations among students require treatment but do not pose a risk of transmitting disease. Great Valley Academy shall encourage early detection and treatment in a manner that minimizes disruption to the educational program and reduces student absences.

- School employees shall report all suspected cases of head lice to the school health clerk or designee as soon as possible.
- If a student is found with active, adult head lice, the parent/guardian will be called to pick-up the child. The parent/guardian of any such student shall be given information about treatment of head lice and encouraged to begin treatment immediately and to check all members of the family.
- The parent/guardian shall be informed that the student shall be checked upon return to school the next day and allowed to remain in school if no active head lice are detected.
- Upon the student's return to school, the school health clerk or designee shall check the student for active head lice. If it is determined that the student remains infected with head lice, the school health clerk or designee shall contact the student's parent/guardian to discuss treatment and have the parent/guardian pick-up the child.

- If a student is found consistently infested with head lice, the student may be referred to a wellness team which may consist of the school health clerk, Principal, local health services and other appropriate individuals, to determine the best approach for identifying and resolving problems contributing to the student's head lice infestations.
- When it is determined that one or more students in a class or school are infested with head lice, the Principal or designee may, at their discretion, notify parents/guardians of students in that class or school and provide them with information about the detection and treatment of head lice.
- School staff shall maintain the privacy of students identified as having head lice.

Mental Health Services

In accordance with AB 2022, Pupil mental health services: school notification, Great Valley Academy wants to ensure that parents, guardians, and students are informed about resources available for anyone who believes they are in a mental health crisis. We encourage parents/guardians and student to talk with any staff member of Great Valley Academy if they are concerned about another student and possible mental health needs. Take all threats of suicide seriously.

There are a number of resources available in our community for students who struggle with social/emotional related issues. If your child experiences social/emotional challenges that are impacting his/her ability to succeed, please contact your school administrator or one of the mental health resources listed below. This document is also available on our website at www.greatvalleyacademy.com

Resource	Contact Info	Services Provided
Aspiranet	(209) 576-1750 1620 Cummins Drive	Individual, group and family counseling. Culturally sensitive staff available who speak English and Spanish. FEE: Medi-Cal insurance only.
The Bridge	(209) 571-8430 605 Chicago Avenue	Interpretation and translation (Cambodian, Hmong, and Laotian); referral services; cultural liaison for clients with public/private agencies; ESL class; youth activities and tutoring. FEE: None
Center For Human Services	(209) 526-1440 2000 W. Briggsmore Ave, Ste. I	Individual, group and family counseling. Services offered in English and Spanish. FEE: Sliding scale; accepts Medi-Cal.
Children's Crisis Center	(209) 577-0138/(209) 577-4413 1244 Fiori Avenue	Parenting classes, advocacy program, 24-hour crisis line, emergency child care. FEE: Free to qualifying families.
Community Hospice	(209) 578-6300 4368 Spyres Way	Support groups for people grieving loss of a parent, child, sibling, friend or significant other. Culturally competent bilingual staff available. FEE: None
El Concilio	(209) 523-2860 1314 H Street	Counseling, referrals and education. Free ESL/citizenship classes, immigration, first time home buying/financial literacy, assistance, support groups, counseling/referrals, health and parent education. FEE: None
Haven Women's Center	(209) 524-4331 (888) 454-2836 24hr crisis line 618 13 th Street, Suite I	Education/ emotional support groups, individual counseling, rape crisis intervention help, domestic violence, restraining orders, battered women's shelters. Youth groups for children and teens impacted by DV or sexual abuse. FEES: Free support groups; no fee for any services.
Health Net (MHN)	(888) 426-0030	For Medi-Cal consumers who have been determined to meet criteria for mild to moderate mental health services. Contact the number for referrals and further information. FEE: None
Josie's Place Drop-In Center	(209) 558-4464 1208 9 th Street	Provides a safe environment for 16-25 year olds with serious emotional disturbance or mental illness. Employment and housing resources, access to computers, games, billiards, organized activities. FEE: None
Parents, Families, and Friends of Lesbians and Gays (PFLAG)	(209) 566-2468 324 College Avenue	A supportive group that believes in the dignity and worth of all individuals. Confidential emotional support, education, and opportunities for advocacy. FEE: None
Parent Resource Center	(209) 549-8822/(209) 549-8193 530 S. Santa Cruz Avenue/ 811 5 th Street	Resource centers provide a wide range of services from support (clothes closets and food) to mental health counseling. FEE: None
Parents United	(209) 524-4858 610 14 th Street	One-on-one counseling for adults molested as children and adult offenders; groups for children. FEE: Medi-Cal, Private Insurance, Victim Witness. Free for uninsured Stanislaus County residents.
Sierra Vista Child and Family Services	Children: (209) 550-5869 1400 K Street, Ste. B Adults: (209) 524-6371 1030 15 th Street	Variety of child, adult and family services including individual/family and divorce counseling, court ordered counseling, parent education, anger management, domestic violence programs. FEE: Sliding scale, private insurance, Medi-Cal, no-fee parenting classes.

Lost and Found

Please **mark your child's name on all personal items** such as sweaters, hats, gloves, coats, lunch containers, and book bags. Check for lost items in our lost and found. Items not claimed are periodically donated to charity. Lost and Found is located outside the main music room. GVA is not responsible for lost or stolen personal items brought to campus

Kids' Care (Before/After School Child Care)

Great Valley Academy commits to serving families by providing high- quality before and after school care that provides a nurturing and enriched environment for children. Students will have the opportunity to participate in a range of age- appropriate activities. Please contact Kids' Care for details in securing a space for your child. Information can be found at <https://www.greatvalleyacademy.com/pages/Kids-Care.html> Depending on the program, a contract will need to be signed and payment arrangements made.

Kids Care – Days Closed for 2022-2023

September 5 th	November 11 th	November 23 rd – 25 th	December 23 rd , 26 th , 30 th
January 2 nd	January 16 th	February 20 th	April 7 th & 10 th
May 5 th	May 29 th	July 4 th	

Kindergarten Extension

Kindergarten Extension is a unique and free program offered to GVA Kindergartners to help ensure that they develop the learning systems to be successful in school. It is either an extension at the end of the day for morning kindergartners or prior to the day for afternoon kindergartners. The program offers GVS (Great Valley Smart) type activities that will help to make our kindergartners better learners in the classroom. This program starts in September each year.

Recess

Recesses are scheduled. Each class has a scheduled time that they will be out for recess. If you want to know your student's time, check with your child/children's teacher. Recess times are subject to change based on classroom needs.

Electronic Devices

All personal electronic devices (including, but not limited to, cell phones, computers, music players, game systems, smart watches, recording devices, cameras, etc.) **must be** turned off and put away at all times while on the school campus. Additionally, the use of personal electronic devices are **prohibited** during school-sponsored events, such as field trips, sporting events, after school clubs, etc. For a variety of reasons, these devices are not conducive to a social school community atmosphere. Headphones of any kind are not to be worn unless they are plugged into a school device for education purposes.

Great Valley Academy may grant permission to use devices for special events or under certain circumstances. The school will communicate these opportunities to parents and students.

At no time may any person use an electronic listening or recording device (including but not limited to cell phones, smart watches, video cameras, cameras, remote applications, etc.) without the prior consent of the teacher and principal.

Great Valley Academy is not responsible for the **loss, theft, or damage** to personal electronic devices. Great Valley Academy reserves the right to search content of personal electronic devices if there are reasonable grounds for suspecting that the search will turn up evidence that the student has violated or is violating either the law or GVA rules and regulations. Articulate facts at the inception of the search must support a school official's reasonable suspicion that a search of a personal electronic device is justified. The scope of the search shall be reasonably related to the objectives of the search and not excessively intrusive in light of the age and sex of the pupil and the nature of the infraction. In no case shall a GVA official search a personal electronic device based on curiosity, rumor, or hunch. GVA reserves the right to contact law enforcement at its discretion in order to preserve the safety of all students and staff at the school.

Suggestions and Complaints

All suggestions and complaints should be of a constructive nature and be in line with the values, mission, and philosophy of the school. Staff members are open to the opinions of students who would like to contribute in

this positive way. Students may approach appropriate staff members directly and offer suggestions. If the suggestion cannot be dealt with at that level, the staff member will relay the suggestion to the school administration. A copy of the school's general complaint policy is available in the office.

FERPA Rights, Student Records and Directory Information

NOTIFICATION OF RIGHTS UNDER FERPA

The Family Educational Rights and Privacy Act ("FERPA") affords parents and students over 18 years of age ("eligible students") certain rights with respect to the student's education records. These rights are:

1. The right to inspect and review the student's education records within 45 days of the day Great Valley Academy receives a request for access. Please note that the California Education Code permits access within 5 days of the request.

Parents or eligible students should submit to the Great Valley Academy Office Manager, a written request that identifies the record(s) they wish to inspect. The Officer Manager will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected. A student's education records will be available for review during the regular business hours of the school day.

2. The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.

Parents or eligible students who wish to ask Great Valley Academy to amend a record should write Great Valley Academy, Campus Principal, and clearly identify the part of the record they want changed, and specify why it should be changed. If Great Valley Academy decides not to amend the record as requested by the parent or eligible student, Great Valley Academy will notify the parent or eligible student of the decision and advise them of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.

3. The right to provide written consent before Great Valley Academy discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent.

One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. A school official is a person employed by the school as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the Great Valley Academy Board of Directors. A school official also may include a volunteer or contractor outside of the school who performs an institutional service or function for which Great Valley Academy would otherwise use its own employees and who is under the direct control of Great Valley Academy with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

Upon request, Great Valley Academy discloses education records without consent to officials of another school district in which a student seeks or intends to enroll, or is already enrolled if the disclosure is for purposes of the student's enrollment or transfer.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by Great Valley Academy to comply with the requirements of FERPA. The name and address of the Office that administers FERPA are:

Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202-8520

5. FERPA permits the disclosure of PII from students' education records, without consent of the parent or eligible student, if the disclosure meets certain conditions found in §99.31 of the FERPA regulations. Except for disclosures to school officials, disclosures related to some judicial orders or lawfully issued subpoenas, disclosures of directory information, and disclosures to the parent or eligible student, §99.32 of the FERPA regulations requires the school to record the disclosure. Parents and eligible students have a right to inspect and review the record of disclosures. A school may disclose PII from the education records of a student without obtaining prior written consent of the parents or the eligible student –

- To other school officials, including teachers, within the educational agency or institution whom the school has determined to have legitimate educational interests. This includes contractors, consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in §99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(2) are met. (§99.31(a)(1))
- To officials of another school, school system, or institution of postsecondary education where the student seeks or intends to enroll, or where the student is already enrolled if the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of §99.34. (§99.31(a)(2))
- To authorized representatives of the U. S. Comptroller General, the U. S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as the State educational agency in the parent or eligible student's State (SEA). Disclosures under this provision may be made, subject to the requirements of §99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf. (§§99.31(a)(3) and 99.35)
- In connection with financial aid for which the student has applied or which the student has received, if the information is necessary to determine eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid. (§99.31(a)(4))
- To State and local officials or authorities to whom information is specifically allowed to be reported or disclosed by a State statute that concerns the juvenile justice system and the system's ability to effectively serve, prior to adjudication, the student whose records were released, subject to §99.38. (§99.31(a)(5))
- To organizations conducting studies for, or on behalf of, the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction. (§99.31(a)(6))
- To accrediting organizations to carry out their accrediting functions. (§99.31(a)(7))
- To parents of an eligible student if the student is a dependent for IRS tax purposes. (§99.31(a)(8))
- To comply with a judicial order or lawfully issued subpoena. (§99.31(a)(9))
- To appropriate officials in connection with a health or safety emergency, subject to §99.36. (§99.31(a)(10))
- Information Great Valley Academy has designated as "directory information" under §99.37. (§99.31(a)(11))
- To an agency caseworker or other representative of a State or local child welfare agency or tribal organization who is authorized to access a student's case plan when such agency or organization is

legally responsible, in accordance with State or tribal law, for the care and protection of the student in foster care placement. (20 U.S.C. § 1232g(b)(1)(L))

- To the Secretary of Agriculture or authorized representatives of the Food and Nutrition Service for purposes of conducting program monitoring, evaluations, and performance measurements of programs authorized under the Richard B. Russell National School Lunch Act or the Child Nutrition Act of 1966, under certain conditions. (20 U.S.C. § 1232g(b)(1)(K))

NOTICE FOR DIRECTORY INFORMATION

FERPA requires that Great Valley Academy, with certain exceptions, obtain your written consent prior to the disclosure of personally identifiable information from your child's education records. However, Great Valley Academy may disclose appropriately designated "directory information" without written consent, unless you have advised Great Valley Academy to the contrary in accordance with Great Valley Academy's procedures. The primary purpose of directory information is to allow Great Valley Academy to include this type of information from your child's education records in certain school publications. Examples include:

- A playbill, showing your student's role in a drama production;
- The annual yearbook;
- Honor roll or other recognition lists;
- Graduation programs; and
- Sports activity sheets, such as for wrestling, showing weight and height of team members.

Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent's prior written consent. Outside organizations include, but are not limited to, companies that publish yearbooks. In addition, two federal laws require local educational agencies ("LEAs") receiving assistance under the Elementary and Secondary Education Act of 1965 ("ESEA") to provide military recruiters, upon request, with the following information – names, addresses and telephone listings – unless parents have advised the LEA that they do not want their student's information disclosed without their prior written consent.

If you do not want Great Valley Academy to disclose any or all of the types of information designated below as directory information from your child's education records without your prior written consent, you must notify Great Valley Academy in writing at the time of enrollment or re-enrollment. Great Valley Academy has designated the following information as directory information:

- Student's name;
- Address;
- Parent's/Legal Guardian address
- Telephone listing;
- Students' electronic mail address;
- Photograph;
- Date and place of birth;
- Dates of attendance;
- Grade level;
- Participation in officially recognized activities and sports;
- Weight and height of members of athletic teams;
- Degrees, honors, and awards received;
- The most recent educational agency or institution attended;
- Student ID number, user ID, or other unique personal identifier used to communicate in electronic systems but only if the identifier cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user. (A student's SSN, in whole or part cannot be used for this purpose.)

All written requests should be directed to Great Valley Academy, Campus Office Manager.

Visiting/Volunteering

Great Valley Academy – Board Policy No. 2018.040

While Great Valley Academy (“GVA”) encourages parents/guardians and interested members of the community to visit the charter school and view the educational program, GVA’s priority is creating a safe environment for students and staff. Parents volunteering in the classroom can be extremely helpful to our teachers and valuable to our students, and we are grateful to parents for their willingness to volunteer in this manner.

Volunteers are individuals who donate their time, without financial compensation, to benefit GVA. The volunteer’s participation may occur in a classroom setting during the school day or outside the school setting, as part of an extracurricular activity. School policy prohibits discrimination of volunteers on the basis of race, color, national origin, creed, marital status, sex, religion, age, disability, or any other protected status as defined by federal, state or local law.

Volunteer Opportunities include:

- Tutoring/Mentoring
- Athletics
- Performing Arts/Music programs
- Classroom assistance
- School/classroom events like career fairs and field trips
- Before/After-school programs
- Non-classroom (main office, library/media center, etc.) assistance
- Playground/Recess supervision
- Fundraising events

To ensure the safety of students and staff as well as to minimize interruption of the instructional program, GVA has established the following procedures, to facilitate volunteering and visitations during regular school days:

Volunteering

Parents or guardians who are interested in volunteering in the classroom must adhere to the following guidelines:

1. Volunteers shall be (1) fingerprinted and (2) receive Department of Justice background clearance prior to volunteering. GVA reserves the right to restrict certain activities performed by a volunteer based on their background report. Additionally, background reports with serious or felony convictions (pursuant to Ed Code 45122.1) or the requirement to register as a sex offender under California law (Penal Code 290) will be prohibited from volunteering.
2. A volunteer shall also have on file with GVA a certificate showing that, upon initial volunteer assignment, the person submitted to a tuberculosis risk assessment dated within the last 60 days and, if tuberculosis risk factors were identified, was examined and found to be free of infectious tuberculosis within the last 60 days before volunteering. If no risk factors are identified, an examination is not required and only a certificate be provided. Volunteers who are found to be free of infectious TB shall thereafter be required to have a TB Risk Assessment every four years.
3. Volunteer hours must be arranged with the classroom teacher at least forty-eight (48) hours in advance.
4. Prior to volunteering in the classroom, the volunteer should communicate with the teacher to discuss the expectations for volunteering needs. Classroom volunteers are there to benefit the entire class and are not in class solely for the benefit of their own child. Classroom volunteers must follow the instructions provided by the classroom teacher or aide. Classroom rules also apply to volunteers to ensure minimal distraction to the teacher. If a volunteer is uncomfortable following the direction of the teacher or aide the volunteer may leave their volunteer position for that day.
5. In accordance with federal law, all school volunteers are expected to maintain strict confidentiality while volunteering at the school. All things that are seen and heard at school about employees or

children and their families should be considered privileged/confidential information. Trust must be established and maintained in order for our volunteer program to be successful.

6. Volunteers shall follow and be governed by all other guidelines indicated elsewhere in this policy. This includes, but is not limited to, the process of registering and signing out of the campus at the main office as indicated below.
7. This policy does not authorize GVA to permit a parent/guardian to volunteer or visit the campus if doing so conflicts with a valid restraining order, protective order, or order for custody or visitation issued by a court of competent jurisdiction.
8. Volunteers understand that they will not receive any compensation or salary, or any other health or retirement benefits, or workers' compensation insurance coverage while volunteering. Volunteers agree to waive all claims against GVA and hold GVA, its officers, agents, employees, authorizer, and volunteers harmless from any and all liability or claims which may arise out of or in connection with their participation in volunteering at GVA.

Visitation

1. Visits during school hours should first be arranged with the teacher, at least forty-eight (48) hours in advance. If a conference is desired, an appointment should be set with the teacher during non-instructional time, at least forty-eight (48) hours in advance. Parents seeking to visit a classroom during school hours must first obtain the approval of the classroom teacher.
2. All volunteers and visitors shall register in the Visitors Log Book and affix a Visitor's Sticker in a visible location on their clothing in the main office immediately upon entering any school building or grounds when during regular school hours. When registering, the visitor is required to provide his/her name, address, his/her purpose for entering school grounds, and proof of identity. For purposes of school safety and security, the campus Principal or designee may design a visible means of identification for visitors while on school premises.
3. While on campus, visitors are to enter and leave classrooms as quietly as possible, not converse with any student, teacher, or other instructional assistant unless permitted, and not interfere with any school activity. No electronic listening or recording device may be used in a classroom without the teacher, Principal and Chief Executive Officer's written permission.
4. Before leaving campus, the visitor shall sign out of the Visitors Log Book in the main office.
5. The Principal, or designee, may refuse to allow a visitor or volunteer if it is believed that the presence of the visitor or volunteer would cause a threat of disruption or physical injury to teachers, other employees, or students.
6. The Principal or designee may withdraw consent to be on campus even if the visitor has a right to be on campus whenever there is reason to believe that the person has willfully disrupted or is likely to disrupt GVA's orderly operation. Consent can be withdrawn for up to fourteen (14) days.
7. The Principal or designee may request that a visitor who has failed to register, or whose registration privileges have been denied or withdrawn, promptly leave school grounds. When a visitor is directed to leave, the Principal or designee shall inform the visitor that if he/she reenters the school without following the posted requirements he/she will be guilty of a misdemeanor pursuant to California Penal Code 626.8.
8. Any visitor that is denied registration or has his/her registration revoked may request a conference with the Principal. The request shall be in writing, shall state why the denial or revocation was improper, shall give the address to which notice of conference is to be sent, and shall be delivered

to the Principal within fourteen (14) school days of the denial or revocation of consent. The Principal shall promptly mail a written notice of the date, time, and place of the conference to the person who requested the conference. A conference with the Principal shall be held within seven (7) school days after the Principal receives the request. If no resolution can be agreed upon, the Principal shall forward notice of the complaint to GVA's Chief Executive Officer. The Chief Executive Officer shall address the complaint with the Principal and make a final determination.

9. The Principal or designee shall seek the assistance of the police in managing or reporting any visitor in violation of this policy.

Penalties

1. Pursuant to the California Penal Code 626.8, if a visitor does not leave after being asked or if the visitor returns without following the posted requirements after being directed to leave, he/she will be guilty of a crime as specified which is punishable by a fine of up to \$500.00 (five hundred dollars) or imprisonment in the County jail for a period of up to six (6) months or both.
2. Under California Education Code section 44811, disruption by a parent, guardian or other person at a school or school sponsored activity is punishable, upon the first conviction by a fine or no less than \$500.00 (five hundred dollars) and no more than \$1,000.00 (one thousand dollars) or by imprisonment in a County jail for no more than one (1) year, or both the fine and imprisonment.

Disruptive conduct may lead to GVA's pursuit of a restraining order against a visitor, which would prohibit him/her from coming onto school grounds or attending school activities for any purpose for a period of up to three (3) years.

Field Trip Chaperones

Parent chaperones are often needed for field trips during the school year. **Parents must be fingerprinted and have a clear TB certification on file before chaperoning a field trip.** When needed, teachers will notify parents of the opportunity to chaperone. If the number of parent volunteers is greater than the number of spots available for the field trip, a lottery will be held to determine the parents able to chaperone. **Siblings are NOT allowed to attend field trips.**

Assessment and Grading

Parents will be informed of their child's progress in school by an academic report card, a character education report card, or a conference. Parents receive academic and character report cards three times a year. Character building is an important part of our curriculum. GVA adheres to Common Core Standards.

Assessment of student progress will take several forms at GVA:

- NWEA
- CAASPP/CST - Standardized Testing and Reporting
- Curriculum/Local/Benchmark Assessments
- We report to students and parents by alternating academic report cards, character education report cards, and conferences. On our report cards we use a grading scale of:
 - **4** - Work that **exceeds** the standards for competence
 - **3** - Work that **demonstrates** the standards for competence.
 - **2** – Work that meets **partial** standards for competence
 - **1** – Work that meets **minimal** standards for competence

4: Above and beyond: A score of 4 is reserved for students who surpass mastery. "4" work requires exceptional accuracy (percentages), unique perspectives, rationales, applications, or effort that results in exemplary quality.

3: Mastery: A score of 3 indicates a student has achieved the learning outcome.

2: Nearing mastery: A score of 2 indicates that a student has not yet met the learning objective. Ideally, this would result in re-teaching or specific feedback that would support the student in earning at least a “3.”

1: Not there yet: A score of 1 indicates that a student lacks understanding of the specific content standard. As with a score of 2, support is required to help this student progress to mastery.

Note: “3” and “4” work may be defined by the teacher from the onset. “4” work may also be undefined and left to the student to determine. Either way, Above and Beyond is a central idea in the GVA classroom.

Character Education

We recognize that character is a developmental process. All GVA community members will be expected to understand the different stages of maturation and the behaviors that correlate to each stage. Training will be provided for all teachers, para’s, students, and parents. Teachers will assess throughout the day. Students will self-assess and set goals.

Getting Extra Help for Your Student

If you feel your child is in need of extra support, talk with your child’s teacher. We have an SST (Student Success Team) process for assessing needs and organizing more support.

Homework

Elementary: In order for children to grow and mature into competent young adults, they need to have time to spend with their families and participate in extra-curricular activities as well as have time to “just be kids” and play. To support our students with this, we will limit homework to reading 20 minutes a night, unfinished work, home projects, and math and spelling facts as needed. In an effort to prepare sixth graders for Junior High, sixth grade students will do math homework nightly.

Jr. High: Students should not be inundated by homework, but they need to have some on a regular basis in order to extend their learning and develop a good work habit. In general, Jr. High students will be given no more than one hour of homework each school night. Every assignment needs to be turned in on time. Turning in a late assignment means the child will not be prepared to fully

Achievement Testing

It is important that all schools regularly measure students’ progress in learning. This has been shown by the Effective Schools Research to be one of the most important things we can do to make sure we have high student achievement. Here are the ways that we measure student learning at Great Valley Academy:

- Teacher- developed or textbook chapter and unit tests – All teachers routinely give assessments to their students on various lessons and units that they are teaching. These assessments are graded and make up the report card grade that parents receive.
- Reading Tests – All students in grades 1-8 are tested several times per year with the Developmental Reading Assessment or Quantitative Reading Inventory. These are national standard tests of reading fluency and comprehension that indicate which grade level an individual student can successfully read and comprehend. These results are reported to parents on our report cards.
- State/Federal Tests – California requires testing each year
- Cooperative and Individual Projects – In various subjects, projects are frequently assigned and assessed by teachers. These are designed for students to demonstrate learning within our curriculum.
- NWEA – North West Evaluation Association is an organization that provides research based computerized assessments for teachers that help them hone in on their students needs and abilities.

Most of the parents with whom we have spoken are pleased that we do not spend all year preparing for one test. They’re also pleased their child is not experiencing a lot of pressure to perform satisfactorily on only one test. GVA teachers and parents consider the reading tests and growth shown on the internal benchmarks to be the most important measures of achievement. We are happy to discuss with you the measurements of achievement that we have chosen and to show you samples at any time.

Special Education

GVA is dedicated to the belief that all students can learn and must be guaranteed equal opportunity to become contributing members of the academic environment and society. GVA provides special education instruction and related services in accordance with the Individuals with Disabilities in Education Improvement Act (IDEIA), Education Code requirements. These services are available for special education students enrolled at GVA.

GVA offers high quality educational program and services for all its students in accord with the assessed needs of each student. GVA collaborates with parents, the student, teachers and other agencies as may be indicated, in order to best serve the educational needs of each student. If you have any questions or concerns related to special education or 504 services for GVA students, please contact the main office at (209) 545-7500.

Textbook & Chromebook Policy

Students may be issued textbooks and/or Chromebooks from their classroom teacher. Students are responsible for the care of their textbook and Chromebook. Textbooks and Chromebooks are assigned to students and the condition is noted. **Any textbook or Chromebook checked out to a student that is not returned or is returned in poor condition will have to be replaced at the parents cost.**

Students are expected to meet financial obligations to the school for such items as lost textbooks, Chromebooks, sports uniforms, fundraiser items, etc. Students **must** meet their current obligations as it may affect their ability to purchase yearbooks, purchase tickets to special events, participate in promotion ceremonies, etc.

Discipline Philosophy and Practice

At all times we will treat the students kindly and respectfully, and work to have warm relationships. At Great Valley Academy we have one school rule for all students and adults within the school. That rule is **“Do The Right Thing, Because It Is The Right Thing To Do.”** That is exactly what we want to teach our students.

We do the right thing as we go through our daily lives not because someone is going to give us a reward, or because we will be punished, but because it is the right thing to do. It will make us happier and those around us happier. Doing the right thing helps promote better learning.

At GVA we believe that talking it through will solve many problems. Teachers engage the students in reflecting on their behavior. We teach our students a process for talking through problems that promotes self-evaluation for improved behavior. The prevention of all discipline problems by developing good relationships with our students and creating classrooms that are need-fulfilling for students is a primary goal at Great Valley Academy. If a student does disrupt learning, we will:

- Ask the student to please do his/her work in another area of the room.
- A student may be asked to go to another classroom (which has been arranged ahead of time) until he/she is ready to rejoin his/her regular classroom.

If the student is disruptive in the hosting classroom, or the student's teacher believes the disruption is severe, then the student may go to the connecting room or alternate supervised location. During the time out of the classroom, the connector or an administrator will work with the child in order to help the student calm down and feel happier.

- If there is defiance, violence or threat of violence, administration will be contacted.

If the incident is severe enough (violence, threats, or repeated disruption of learning), it may warrant a suspension. Progressive discipline may be used in order to help the child improve behavior. For example progressive discipline may look like this:

1st Incident – The student goes home that day and also the next day.

2nd Incident – The student goes home, two-day suspension.

3rd Incident – The student goes home, three-day suspension.

State of California Law Regarding School Safety

It is the policies of the State Board of Education that all students enrolled in public schools in California have the right to safe schools. The State Board believes that students cannot benefit fully from an educational program unless they attend school regularly in an environment that is free from physical and psychological harm.

Drug and Alcohol Free School

Great Valley Academy will take a firm but compassionate approach toward students using drugs and/or alcohol. Our policy is aimed at taking a firm disciplinary stance for drug and alcohol related incidents at school. At the same time, we recognize that some students may require drug and/or alcohol treatment information and access to drug and/or alcohol treatment programs in order to truly become drug and alcohol free.

Gun-Free School Zone Act

Pursuant to Penal Code 626.9 known as the Gun-Free School Zone Act of 1995, any person who possess a firearm in a place that the person knows, or reasonably should know, is a school zone, shall be punished according to PC 626.9.f. A "school zone" means an area in, or on the grounds of, a public or private school providing instruction in kindergarten or grades 1 – 12, inclusive, or within a distant of 1,000 feet from the grounds of the public or private school. Great Valley Academy has zero tolerance for gun and weapon possessions on campus or GVA sponsored events. Local authorities will be contacted for any violation.

Tobacco Use

State of California law prevents anyone from using any form of tobacco on school premises. Please extinguish cigarettes, cigars, pipes and discard any other forms of tobacco before entering our parking lot/driveways and other school property.

Suicide Prevention Policy

In response to California State Assembly Bill 2246, Great Valley Academy has adopted a suicide prevention policy. If you would like to review the suicide prevention policy, please contact the campus office.

Student/Staff Interaction Policy

Adopted Board Policy 2019.47- April 2019

GVA recognizes its responsibility to make and enforce all rules and regulations governing student and employee behavior to bring about the safest and most learning-conducive environment possible.

Corporal Punishment

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student. For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent excessive damage to property.

Acceptable and Unacceptable Staff/Student Behavior

This policy is intended to guide all GVA staff in conducting themselves in a manner that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between students and staff.

Although this policy gives direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders.

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing the boundaries of a student/staff relationship is deemed an abuse of power and a betrayal of public trust.

Some activities may seem innocent from a staff member's perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and

unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct, harmful, or abusive. Staff must understand their own responsibility for ensuring that they do not violate the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Violations could subject the employee to discipline up to and including termination. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interactions must have boundaries surrounding potential activities, locations and intentions.

The following examples are not exhaustive lists:

Unacceptable Staff/Student Behaviors (Violations of this Policy)

- (a) Giving gifts to an individual student that are of a personal and intimate nature.
- (b) Any type of inappropriate physical contact with a student. This includes but is not limited to; massages, lingering touches, squeezing, stroking of hair, touches to private body areas.
- (c) Intentionally being alone with a student away from the school.
- (d) Making or participating in sexually inappropriate comments, storytelling or jokes.
- (e) Seeking emotional involvement with a student for your benefit.
- (f) Becoming involved with a student such that a reasonable person may suspect inappropriate behavior.

Acceptable and Recommended Staff/Student Behaviors

- (a) Getting parents' written consent for any off school property or after-school activities.
- (b) Emails, text, phone and instant messages to students must be very professional and pertaining to school activities or classes.
- (c) Keeping the door open when alone with a student.
- (d) Keeping reasonable space between you and your students.
- (e) Stopping and correcting students if they cross your own personal boundaries.
- (f) Keeping parents informed when a significant issue develops about a student.
- (g) Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries.
- (h) Involving your supervisor if conflict arises with the student or has the potential to become severe.
- (i) Making detailed notes about an incident that could evolve into a more serious situation later.
- (j) Recognizing the responsibility to stop unacceptable behavior of students or coworkers.
- (k) Recommend asking another staff member to be present if you will be alone with a student.
- (l) Pats on the back, high fives and handshakes are acceptable.
- (m) Hugs of an appropriate nature, often student initiated, that are quick, non-sexual, and side to side when possible. For the purpose of this policy, the term "hug" is defined as a quick and appropriate embrace between a staff member and student as form of admiration, respect and/or care. GVA's philosophy of Safe, Loved and Learning allows for safe interactions such as hugs in order to support students overall well-being and foster authentic adult interactions. Hugs should in no way be excessive, aggressive, lasting for a prolonged period of time.
- (n) Keeping your professional conduct a high priority.

This policy does not prevent: 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; 3) engaging in a rescue or application of Cardio Pulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Excessive force is prohibited.

Boundaries Reporting

When any staff member, parent, or student becomes aware of a staff member (or volunteer, guest, vendor) having violated the boundaries specified in this policy, or has a strong suspicion of misconduct, he or she must report the suspicion to an Administrator promptly. Reasonable suspicion means something perceived in spite

of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the school as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse. The Administrator will notify the Chief Executive Officer or designee promptly upon investigation.

Child Abuse / Sexual Abuse Reporting (Mandatory Reporting)

If, within your professional capacity or within the scope of your employment, you observe or obtain possession of knowledge that a child has been a victim of child abuse or sexual abuse, or you reasonably suspect it, California Penal Code Section 11166 requires you to immediately report this information or suspicion directly to a child protective agency or the police. The report shall be made by phone immediately and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse. Please refer to GVA policy resolution 2019.046 for detailed reporting requirements.

Investigating

The Administrator will promptly investigate, document and report to the Chief Executive Officer or designee the investigation of any allegation of sexual misconduct or inappropriate behavior, using such support staff or outside assistance, as he or she deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating Administrator, and all others privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as reasonably as possible. The Chief Executive Officer or designee shall promptly notify the Governing Board in closed session of the existence and status of any investigations. Upon completion of any such investigations, the Chief Executive Officer or designee shall report to the Governing Board any conclusions reached. The Chief Executive Officer or designee shall consult with legal counsel, as appropriate, prior to, during, and after conducting any investigation.

Consequences

Staff members who violate this policy will be subject to disciplinary action up to and including termination, and where appropriate, will be reported to authorities for potential legal action.

Non-Discrimination Statement

GVA shall not discriminate against any student or employee on the basis of (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, religious affiliation, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in the California Penal Code or association with an individual who has any of the aforementioned characteristics).

The School adheres to all provision of federal law related to students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990 (ADA) and the Individuals with Disabilities In Education Improvement Act of 2004 (IDEIA).

GVA is committed to providing a work and educational atmosphere that is free of unlawful harassment under Title IX of the Education Amendments of 1972 (sex); Title IV, VI, and VII of the Civil Rights Act of 1964 (race, color or national origin); The Age Discrimination in Employment Act of 1967; The Age of Discrimination Act of 1975; the IDEIA; and Section 504 and Title II of the ADA (mental and physical disability). GVA also prohibits sexual harassment, including cyber sexual bullying, and harassment based upon pregnancy, childbirth or related medical conditions, race, religion, religious affiliation, creed, color, gender, gender identity, gender expression, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation, or any other basis protected by federal, state, local law ordinance or regulation. GVA does not condone or tolerate harassment of any type, including discrimination, intimidation, or bullying, including cyber sexual bullying, by any employee, independent contractor or other person with which GVA does business, or any other individual, student, or volunteer. This applies to all employees, students, volunteers and relationships, regardless of position or gender. GVA will promptly and thoroughly investigate a complaint of harassment and take appropriate corrective action, if warranted. Inquiries, complaints, or grievances regarding harassment as described in this section, above, should be directed to the GVA Uniform Complaint Procedures (UCP) Compliance Officer:

Roop Pannu, Vice-Principal (209) 545-7500

Suspected Child Abuse

All GVA staff members are mandated to report any and all known or suspected incidents of child abuse to Child Protective Services (CPS) as soon as practically possible. This mandate represents a legal and ethical responsibility to protect children and ensure that their physical, mental, and emotional needs are met and nurtured. This mandate also aligns with GVA's commitment to ensure that all students are safe, loved, and learning. As such, GVA staff accepts their responsibility as mandated reporters and will act in accordance to this mandate at all times and in all circumstances.

Homeless Students

The term "homeless children and youth" means individuals who lack a fixed, regular and adequate nighttime residence due to economic hardship. It includes children and youths who (42 USC 11434 (a)):

1. Are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting foster care placement;
2. Have a primary nighttime residence that is a public or private place not designed for or ordinarily used as regular sleeping accommodations for human beings;
3. Are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings;
4. Runaway children or children who are abandoned; and
5. Migratory children and unaccompanied youth (youth not in the physical custody of a parent or guardian) may be considered homeless if they meet the above definition of "homeless."

Homeless status is determined in cooperation with the parent or guardian. In the case of unaccompanied youth, status is determined by the School Liaison.

School Liaison

The Chief Executive Officer or designee designates the following staff person, Vice Principal, Roop Pannu as the School Liaison for homeless students (42 USC 11432(g)(1)(J) & (e)(3)(C).). The School Liaison shall ensure that (42 USC 11432(g)):

1. Homeless students are identified by school personnel and through coordination activities with other entities and agencies.
2. Homeless students enroll in, and have a full and equal opportunity to succeed at Charter School.
3. Homeless students and families receive educational services for which they are eligible, including Head Start and Even Start programs.
4. Parents/guardians are informed of the educational and related opportunities available to their children and are provided with meaningful opportunities to participate in the education of their children.
5. Public notice of the educational rights of homeless children is disseminated at places where children receive services, such as schools, shelter and soup kitchens.
6. Enrollment/admissions disputes are mediated in accordance with law, the Charter School charter and Board policy.
7. Parents/guardians are fully informed of all transportation services as applicable.
8. The School Liaison collaborates with State coordinators and community and school personnel responsible for the provision of education and related services to homeless children and youths.

For any homeless student who enrolls at GVA, a copy of the School's complete policy shall be provided at the time of enrollment and at least twice annually.

Bullying/Harassment

Harassment is a violation of state and federal law as well as Federal Charter School policy. It can take the form of verbal or physical threatening and conduct of a racial or sexual nature. Such behavior will not be tolerated at Great Valley Academy. Examples of harassment include, but are not limited to, vulgar or obscene comments and/or jokes, unwelcome hugging or touching, referring to someone in demeaning terms, starting or spreading demeaning rumors about the life of another individual.

Title IX, Harassment, Intimidation, Discrimination, and Bullying Policy

It is the policy of the State of California to afford all persons in public schools equal rights and opportunities in the educational opportunities of the state, regardless of their disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, association with a person or group with one or more of these actual or perceived characteristics, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of Penal Code (and as amended).

Great Valley Academy Charter School believes that all students have a right to a safe and healthy school environment. Schools and their respective communities have an obligation to promote mutual respect, tolerance, and acceptance.

Great Valley Academy Charter School will not tolerate behavior that infringes on the safety or wellbeing of any student. As used in this policy, “discrimination, harassment, intimidation, and bullying” describe the intentional conduct, including verbal, physical, written communication, or cyberbullying, including cyber sexual bullying, that is based on the actual or perceived characteristics of disability, mental health condition, gender, gender identity, gender expression, nationality, race or ethnicity, religion, religious affiliation, sexual orientation, or association with a person or group with one or more of these actual or perceived characteristics. In addition, bullying encompasses any conduct described in the definitions set forth in this policy. A student shall not intimidate, harass, discriminate against or bully another student through words or actions. Such behavior includes: direct physical contact, such as hitting or shoving; verbal assaults, such as teasing, threatening, or name-calling; and social isolation or manipulation.

To the extent possible, the Charter School will make reasonable efforts to prevent student from being discriminated against, harassed, intimidated and /or bullied, and will take action to investigate, respond and address any reports of such behaviors in a timely manner. Charter School staff who witness acts of discrimination, harassment, intimidation, and bullying will take immediate steps to intervene, so long as it is safe to do so.

Moreover, the Charter School will not condone or tolerate misconduct prohibited by this Policy by any employee, independent contractor or other person with which Charter School does business, or any other individual, student, or volunteer. This policy applies to all employee, student, or volunteer actions and relationships, regardless of position or gender. Charter School will promptly and thoroughly investigate any complaint of such misconduct prohibited by this Policy and take appropriate corrective action, if warranted.

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

Russell Howell (Principal) or Roop Pannu (Vice-Principal) – (209) 545-7500

Prohibited Unlawful Harassment

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

Prohibited Unlawful Harassment under Title IX

Title IX (20 U.S.C. § 1681 et. seq; 34 C.F.R. § 106.1 et. seq) and California state law prohibit harassment on the basis of sex. In accordance with these existing laws, discrimination on the basis of sex education institutions is prohibited. All persons, regardless of sex, are afforded equal rights and opportunities and freedom from unlawful discrimination in education programs or activities conducted by the Charter School. GVA is committed to provide a workplace and educational environment free of sexual harassment and considers such harassment to be a major offense, which may result in disciplinary action.

Sexual harassment consists of sexual advances, request for sexual favors and other verbal or physical conduct of a nature when: (a) submission to the conduct is explicitly or implicitly made a term or a condition of an individual’s employment, academic status, or progress; (b) submission to, or rejection of, the conduct by the

individual is used as the basis for employment or academic decisions affecting the individual; (c) the conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidation, hostile, or offensive work or educational environment; and/or (d) submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

It is also unlawful to retaliate in any way against an individual who has articulated a good faith concern about sexual harassment against him/her or against another individual.

Sexual harassment may include, but is not limited to:

- Physical assaults of a sexual nature
- Unwanted sexual advances, propositions or other sexual comments
- Sexual or discriminatory displays or publications anywhere in the workplace or educational environment

The above list is not to be construed as an all-inclusive list of prohibited acts under this policy.

Prohibited Bullying

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

1. Placing a reasonable pupil* or pupils in fear or harm to that pupil's or those pupil's person or property.
2. Causing a reasonable pupil to experience a substantially detrimental effect on his or her physical or mental health.
3. Causing a reasonable pupil to experience a substantial interference with his or her academic performance.
4. Causing a reasonable pupil to experience a substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by GVA.

*"Reasonable pupil" is defined as a pupil, including, but not limited to, an exceptional needs pupil, who exercises care, skill and judgement in conduct for a person of his or her age, or for a person of his or her age with his or her exceptional needs.

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

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

1. A message, text, sound, video, or image.
2. A post on a social network Internet Web site including, but not limited to:
 - a. Posting to or creating a burn page. A "burn page" means an Internet Website created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - b. Creating a credible impersonation of another actual pupil for the above. "Credible impersonation" means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
 - c. Creating a false profile for the purpose of having one or more of the effects listed in

subparagraph (1) above. "False profile" means a profile of fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.

3. An act of "Cyber sexual bullying" including, but not limited to"
 - a. The dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in definition or "bullying," above. A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable for the photograph, visual recording, or other electronic act.
 - b. "Cyber sexual bullying" does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
4. Notwithstanding the definitions of "bullying" and "electronic act" above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

Grievance Procedures

Reporting

- GVA Charter School expects students and/or staff to provide appropriate supervision to enforce standards of conduct and, if they observe or become aware of misconduct prohibited by this policy, to immediately report such incidents to the Principal or Vice Principal (who will inform the Principal). For purposes of this policy, the Principal serves as the "Policy Coordinator" for implementation of this policy, and can be reached at (209) 545-7500. Staff members are required to intervene and report as indicated in this policy. This policy applies to students on school grounds, while traveling to and from school or a school-sponsored activity, during the lunch period, whether on or off campus, and during a school-sponsored activity.
- Staff members that witness alleged acts of misconduct prohibited by this policy shall take immediate steps to intervene when safe to do so and call for assistance, as needed. Other members of the school community, including students, parents/guardians, volunteers, and visitors witnessing or experiencing bullying are strongly encouraged to report the incident to the Policy Coordinator; such reporting will not reflect on the target/victim or witnesses in any way.
- Students are expected to immediately report alleged acts of misconduct prohibited by this policy, as well as any other form of teasing or other verbal or physical abuse to the campus Principal or Vice-Principal (within 60 days of occurrence). Any student who feels she/he is a target of such behavior should immediately contact a teacher, counselor, principal, or staff person so that she/he can get assistance in resolving the issue consistent with this policy.
- While submission of a written report is not required, the reporting party is encouraged to use the report form available in the Main Office. However, oral reports shall also be considered. Reports may be made anonymously, but formal disciplinary action cannot be based solely on anonymous information. Complaints regarding such misconduct may also be made to the U.S. Department of Education, Office of Civil Rights.
- GVA Charter School prohibits retaliatory behavior against any complainant or any participant in the complaint process.
- All supervisors of staff will receive sexual harassment training within six (6) months of their assumption of a supervisory position and will receive further training once every two (2) years thereafter. All staff will receive sexual harassment training and/or instruction concerning sexual harassment in the workplace as required by law. Great Valley Academy will also provide staff development training in bullying prevention and cultivate acceptance and understanding in all students and staff members to build each school's capacity to maintain a safe and healthy learning environment.

Investigation

- Each and every complaint of misconduct prohibited by this policy will be promptly and thoroughly investigated by the Policy Coordinator or designee, upon notification of the complaint. Students can rely on staff to investigate each complaint in the most confidential manner possible under the circumstances.
- At the conclusion of the investigation, the Policy Coordinator or designee will notify the complainant of the outcome of the investigation, including any actions necessary to resolve the incident/situation. However, in no case may the Policy Coordinator or designee reveal confidential student information related to other students, including the type and extent of discipline issued against such students.
- Complaints shall be investigated and resolved within (30) school days, unless circumstances reasonably require additional time.
- All records related to any investigation of misconduct prohibited by this policy will remain in a secure location in the District Office of Great Valley Academy.
- In those instances when the complaint filed under this policy also requires investigation under the Uniform Complaint Procedures, such investigation will be undertaken concurrently.
- The school will make reasonable efforts to keep a report of misconduct by this policy and the results of investigation confidential.

Consequences

- Students or employees who engage in misconduct prohibited by this policy will be subject to disciplinary action.

Uniform Complaint Procedures

- When harassment or bullying is based upon one of the protected characteristics set forth in this policy, a complainant may also fill out a Uniform Complaint procedures ("UCP") complaint form at any time during the process, consistent with the procedures laid out in this Handbook.

Appeal

- Should the complainant find the Policy Coordinator's unsatisfactory, he/she may, within five (5) school days, file an appeal with the Designated Appeals Committee. In such cases, at least three (3) certificated School employees who are unfamiliar with the case and who have been previously designated and trained for this purpose shall be assembled to conduct a confidential review of the Complainant's appeal and render a final decision.

*Teachers should discuss this policy with their students in age-appropriate ways and should assure them that they need not endure any form of bullying, harassment, intimidation, or sex-based misconduct. Students who violate this policy are subject to disciplinary action up to and including expulsion.

Additionally, all staff, students and their parents will receive a summary of this policy prohibiting discrimination, harassment, intimidation, bullying, and violations of Title IX: at the beginning of the school year, as part of the student handbook and/or information packet.

TITLE IX, HARASSMENT, INTIMIDATION, DISCRIMINATION & BULLYING

COMPLAINT FORM

Name: _____ Date: _____

Date of Alleged Incident(s): _____

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

List any witnesses that were present: _____

Where did the incident(s) occur? _____

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

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

Signature of Complainant

Date

Print Name

To be completed by Great Valley Academy:

Received by: _____

Date: _____

Follow up Meeting with Complainant held on: _____

Uniform Complaint Procedure (UCP) Annual Notice

GVA has the primary responsibility to insure compliance with applicable state and federal laws and regulations and has established procedures to address allegations of unlawful discrimination, harassment, intimidation, and bullying; complaints alleging violation of state or federal laws governing educational programs, including the charging of unlawful pupil fees and non-compliance with the Local Control Funding Formula.

GVA shall investigate and seek to resolve complaints using policies and procedures known as the Uniform Complaint Procedure (“UCP”) adopted by our Governing Board. Unlawful discrimination, harassment, intimidation, or bullying complaints may be based on actual or perceived characteristics of age, ancestry, color, ethnic group identification, gender expression, gender identity, gender, genetic information, physical disability, mental disability, medical condition, marital status, nationality, national origin, race or ethnicity, religion, sex, sexual orientation, or on a person’s association with a person or group with one or more of these actual or perceived characteristics, in any GVA program or activity that receives or benefits from state financial assistance.

We are primarily responsible for compliance with federal and state laws and regulations, including those related to unlawful discrimination, harassment, intimidation or bullying against any protected group, and all programs and activities that are subject to the UCP.

Programs and Activities Subject to the UCP (CDE Update 9/2020) - <https://www.cde.ca.gov/re/cp/uc/>

- Child Care and Development Programs
- Compensatory Education
- Consolidated Categorical Aid Programs
- Discrimination, harassment, intimidation, or bullying against any protected group as identified under sections 200 and 220 and Section 11135 of the Government Code, including any actual or perceived characteristic as set forth in Section 422.55 of the Penal Code, or on the basis of a person’s association with a person or group with one or more of these actual or perceived characteristics, in any program or activity conducted by an educational institution, as defined in Section 210.3, that is funded directly by, or that receives or benefits from, any state financial assistance.
- Educational and graduation requirements for pupils in foster care, pupils who are homeless, pupils from military families and pupils formerly in Juvenile Court now enrolled in a school district
- Every Student Succeeds Act
- Local Control and Accountability Plans (LCAP)
- Migrant Education
- Physical Education Instructional Minutes
- Pupil Fees
- School Plans for Student Achievement
- School Safety Plans
- Schoolsite Councils

And any other state or federal educational program the State Superintendent of Public Instruction (SSPI) of the California Department of Education (CDE) or designee deems appropriate.

A complaint of noncompliance with laws relating to pupil fees may be filed pursuant to the local UCP. A pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity. A pupil fee includes, but is not limited to, all of the following:

A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or an extracurricular activity, regardless of whether the class or activity is elective or compulsory, or is for credit.

A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, clothes, or other materials or equipment.

A purchase that a pupil is required to make to obtain materials, supplies, equipment, or clothes associated with an educational activity.

A pupil fee complaint shall not be filed later than one (1) year from the date the alleged violation occurred.

Complaints of noncompliance with laws relating to pupil fees are filed with a Principal of a school. A complaint regarding pupil fees may be filed anonymously if the complaint provides evidence or information to support an allegation of noncompliance with laws relating to pupil fees. Complaints other than complaints relating to pupil fees must be filed in writing.

Complaints alleging discrimination, harassment, intimidation, or bullying, must be filed within twelve (12) months from the date the alleged discrimination, harassment, intimidation, or bullying, occurred or the date the complainant first obtained knowledge of the facts of the alleged discrimination, harassment, intimidation, or bullying, unless the time for filing is extended by the Principal or his or her designee.

Complaints will be investigated and a written Decision or report will be sent to the complainant within thirty (30) days from the receipt of the complaint. This thirty (30) day time period may be extended by written agreement of the complainant. The compliance officer responsible for investigating the complaint shall conduct and complete the investigation in accordance with California regulations and in accordance with GVA's procedures.

The complainant has a right to appeal GVA's Decision to the California Department of Education (CDE) by filing a written appeal within thirty (30) days of receiving the Decision. The appeal must include a copy of the complaint filed with the School and a copy of GVA's Decision.

Civil law remedies may be available under state or federal discrimination, harassment, intimidation, or bullying laws, if applicable. In appropriate cases, an appeal may be filed pursuant to Education Code Section 262.3. A complainant may pursue available civil law remedies outside of GVA's complaint procedures. Complainants may seek assistance from mediation centers or public/private interest attorneys. Civil law remedies that may be imposed by a court include, but are not limited to, injunctions and restraining orders.

A copy of the UCP policy and complaint procedures shall be posted in every classroom and available free of charge in the Main Office. For further information on any part of the complaint procedures, including filing a complaint or requesting a copy of the complaint procedures, please contact the Principal.

*To review the civil rights handbook for the child nutrition program, please visit <http://www.cde.ca.gov/ls/nu/cr/crfactsheet.asp>

Uniform Complaint Procedure Discrimination/Harassment Complaint Reporting Form



In accordance with the Great Valley Academy's Uniform Complaint Procedures (5 CCR 4620) each school shall follow uniform complaint procedures when addressing complaints alleging unlawful discrimination, harassment, intimidation and bullying against any protected group. Protected groups are enumerated by Education Code §§ 200 and 220, It is the policy of the State of California, pursuant to Section 200, that all individuals shall enjoy freedom from discrimination and/or harassment of any kind in the educational institutions of the state. This also includes sexual harassment, which is a form of sexual discrimination (EC § 231.5).

I. Contact Information:

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Home Phone: _____ Work or Cell Phone: _____

II. Complainant

You are filing this complaint on behalf of: ☐ yourself ☐ your child or a (student) ☐ another student ☐ a group
If filing for someone other than yourself, please provide name, grade and date of birth: _____

III. School Information

School Name: _____
Principal's Name: _____
Address: _____
City: _____ State: _____ Zip: _____

IV. Basis of Complaint:

Please check the following box(es), based on the type(s) of discrimination, harassment, intimidation and bullying you experienced,

For allegation(s) of noncompliance, please check the program or activity referred to in your complaint, if applicable:

- | | |
|---|--|
| <input type="checkbox"/> Education Opportunities to Foster/Homeless Youth | |
| <input type="checkbox"/> Child Care & Development | <input type="checkbox"/> Special Education |
| <input type="checkbox"/> Child Nutrition | <input type="checkbox"/> Migrant Education |
| <input type="checkbox"/> Consolidated Categorical Aid | <input type="checkbox"/> Physical Education Minutes |
| <input type="checkbox"/> Local Control Accountability Plan | <input type="checkbox"/> Pupil Fees for Educational Activities |

For allegation(s) of unlawful discrimination, harassment, intimidation or bullying, please check the basis or the unlawful discrimination, harassment, intimidation or bullying described in your complaint, if applicable:

- | | | | | |
|---|--|--|--|--|
| <input type="checkbox"/> Age | <input type="checkbox"/> Ancestry | <input type="checkbox"/> Color | <input type="checkbox"/> Disability (Mental or Physical) | <input type="checkbox"/> Ethnic Group Identification |
| <input type="checkbox"/> Medical Condition | <input type="checkbox"/> Gender/Gender Expression/Gender Identity | <input type="checkbox"/> Genetic Information | | |
| <input type="checkbox"/> National Origin | <input type="checkbox"/> Race or Ethnicity | <input type="checkbox"/> Religion | <input type="checkbox"/> Sex (Actual or Perceived) | <input type="checkbox"/> Marital Status |
| <input type="checkbox"/> Sexual Orientation (Actual or Perceived) | <input type="checkbox"/> Based on association with a person or group with one or more of these actual or perceived characteristics | | | |

V. Details of Complaint

Please answer the following questions to the best of your ability. Attach additional sheets of paper if you need more space.

Please **describe** the type of incident(s) you experienced that led to this complaint, including the events or actions, in as much detail as possible:

List the **individuals** involved in the incident(s) complaint of:

List any **witnesses** to the incident(s):

Describe the **location where** the incident(s) occurred:

Please list **all the date(s) and times** when the incident(s) occurred or when the alleged acts first came to your attention:

What steps, if any, have you taken to resolve this issue before filing a complaint? Have you spoken with GVA personnel, if so, who and when?

Please provide copies of any written documents that may be relevant and supportive of your complaint. I have attached supporting documents. ☐ Yes ☐ No

Signature of Person Filing Complaint

Date

Print Name

To be completed by Great Valley Academy:

Received by: _____

Date Filed: _____

Title: _____

Please provide a duplicate copy to the complainant.

Where to File a Complaint for Child Nutrition Program

To file a program or Civil Rights complaint, please contact one of the following agencies listed below:

Great Valley Academy
Civil Rights Coordinator
3200 Tully Road
Modesto CA 95350
209-576-2283

Child Nutrition Programs
Civil Rights and Program Complaint Coordinator
California Department of Education
Nutrition Services Division
1430 N Street, Room 4503
Sacramento, CA 95814-2342
916-323-8521 **or** 800-952-5609

or

USDA, Director, Office of Adjudication
1400 Independence Avenue, Southwest
Washington, D.C. 20250-9410
866-632-9992

Federal Relay Service 800-877-8339 (English) or 800-845-6136 (Spanish)

Note: The USDA will investigate and process all complaints of discrimination.

All program complaints filed with the NSD are resolved at the state level. The NSD Complaint Coordinator logs the complaint, refers it to the appropriate program or Field Services Unit, and tracks it through resolution. The NSD reserves the right to conduct unannounced site visits to determine the validity of all allegations.

Wheeled Items Policy

Use of bicycles, skateboards, scooters or other similar vehicles are prohibited on campus during the school year. At the perimeter fence students will dismount and walk. GVA is not responsible for lost or stolen personal items brought to campus.

Rational:

Safety of everyone on campus is a primary value of GVA. Current practice for movement on campus sidewalks are to walk or skip.



Great Valley Academy

Student Use of Technology and Acceptable Use Agreement

New technologies are modifying the way in which information may be accessed, communicated and transferred. Those changes also alter instruction and student learning. The Great Valley Academy Charter School ("Charter School") offers students access to technologies that may include Internet access, electronic mail, and equipment, such as computers, tablets, or other multimedia hardware. The Charter School Governing Board intends that technological resources provided by the school be used in a safe, responsible, and proper manner in support of the instructional program and for the advancement of student learning.

Educational Purpose

Use of Charter School equipment and access to the Internet via Charter School equipment and resource networks is intended to serve and pursue educational goals and purposes. Student use of the Internet is therefore limited to only those activities that further or enhance the delivery of education. Students and staff have a duty to use Charter School resources only in a manner specified in the Policy.

"Educational purpose" means classroom activities, research in academic subjects, career or professional development activities, Charter School approved personal research activities, or other purposes as defined by the Charter School from time to time.

"Inappropriate use" means a use that is inconsistent with an educational purpose or that is in clear violation of this policy and the Acceptable Use Agreement.

Notice and Use

The Charter School shall notify students and parents/guardians about authorized uses of school computers, user obligations and responsibilities, and consequences for unauthorized use and/or unlawful activities. Before a student is authorized to use the Charter School's technological resources, the student and his/her parent/guardian shall sign and return the Acceptable Use Agreement specifying user obligations and responsibilities. In that agreement, the student and his/her parent/guardian shall agree not to hold the Charter School or any Charter School staff responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. They shall also agree to indemnify and hold harmless the Charter School and Charter School personnel for any damages or costs incurred.

Safety

The Charter School shall ensure that all Charter School computers with Internet access have a technology protection measure that blocks or filters Internet access to websites that have no educational purpose and/or contain visual depictions that are obscene, constitute child pornography, or that are harmful to minors. While the Charter School is able exercise reasonable control over content created and purchased by the Charter School, it has limited control over content accessed via the internet and no filtering system is 100% effective. Neither the Charter School nor its staff shall be responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence.

To reinforce these measures, the Director or designee shall implement rules and procedures designed to restrict students' access to harmful or inappropriate matter on the Internet and to ensure that students do not engage in unauthorized or unlawful online activities. Staff shall supervise students while they are using online services and may have teacher aides, student aides, and volunteers assist in this supervision.

The Director or designee also shall establish regulations to address the safety and security of students and student information when using email, chat rooms, and other forms of direct electronic communication.

The Director or designees shall provide age-appropriate instruction regarding safe and appropriate behavior on social networking sites, chat rooms, and other Internet services. Such instruction shall include, but not be limited to, maintaining the student's online reputation and ensuring their personal safety by keeping their personal information private, the dangers of posting personal information online, misrepresentation by online predators, how to report inappropriate or offensive content or threats, behaviors that constitute cyberbullying, and how to respond when subjected to cyberbullying. Students are expected to follow safe practices when using Charter School technology.

Students shall not use the Internet to perform any illegal act or to help others perform illegal acts. Illegal acts include, but are not limited to, any activities in violation of local, state, and federal law and/or accessing information designed to further criminal or dangerous activities. Such information includes, but is not limited to, information that if acted upon could cause damage, present a danger, or cause disruption to the Charter School, other students, or the community. Damaging, debilitating or disabling computers, computer networks or systems through the intentional or overuse of electronic distribution or the spreading of computer viruses or other harmful programs shall be prohibited. Any unauthorized online access to other computers by means of hacking into other computers, downloading hacker tools such as port scanners and password crackers designed to evade restrictions shall also be strictly prohibited.

Student use of Charter School computers to access social networking sites is not prohibited, but access is limited to educational purposes only. To the extent possible, the Director or designee shall block access to such sites on Charter School computers with Internet access. The Director or designee shall oversee the maintenance of the Charter School's technological resources and may establish guidelines and limits on their use.

All employees shall receive a copy of this policy and the accompanying Acceptable Use Agreement describing expectations for appropriate use of the system and shall also be provided with information about the role of staff in supervising student use of technological resources. All employees shall comply with this policy and the Acceptable Use Agreement, in addition to any separate policies governing employee use of technology.

Student use of school computers, networks, and Internet services is a privilege, not a right. Compliance with the Charter School's policies and rules concerning computer use is mandatory. Students who violate these policies and rules may have their computer privileges limited and may be subject to discipline, including but not limited to suspension or expulsion per school policy.

ACCEPTABLE USE

The Charter School believes that providing access to technology enhances the educational experience for students. However, student use of school computers, networks, and Internet services is a privilege, not a right. To make that experience successful for everyone, students must abide by the following terms and conditions:

1. **Security.** Students shall not impair the security of Charter School technology resources. Students are expected to:
 - a. Safeguard all personal passwords. Students should not share passwords with others and should change passwords frequently. Students are expected to notify an administrator immediately if they believe their student account has been compromised.
 - b. Access technology only with their account or with a shared account as directed by their teacher and not to allow others to use their account or to use the accounts of others, with or without the account owner's authorization.
2. **Authorized Use.** Students may use Charter School technology resources when directed by a teacher, when technology has been designated for open student use (e.g., computers in the library), and for other educational purposes.

3. Protection Measures. While the Charter School is able exercise reasonable control over content created and purchased by the Charter School, it has limited control over content accessed via the internet and no filtering system is 100% effective. Neither the Charter School nor its staff shall be responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. The student and parent agree not to hold the Charter School or any Charter School staff responsible for the failure of any technology protection measures, violations of copyright restrictions, or user mistakes or negligence. They also agree to indemnify and hold harmless the Charter School and Charter School personnel for any damages or costs incurred.

4. Electronic Information Resources (Internet). The Charter School recognizes the importance of providing student's access to Electronic Information Resources (Internet) in order to enhance and support age and grade appropriate school adopted instructional goals and standards. It is the Charter School's intent to protect students from inappropriate information but school personnel cannot screen all materials available on the Internet. Willful access to inappropriate material is a violation of school policy and may result in the revocation of network privileges and other disciplinary action consistent with the law and designated school rules.

Guidelines for Use of Electronic Resources (Internet)

- a. Be Polite: Never send or encourage others to send messages that are not polite. Use electronic resources wisely. Log off when you are finished.
- b. Use Appropriate, Respectful Language: In your messages, always use language that you know is appropriate and respectful.
- c. Privacy: Do not send any message that includes personal information such as your name, home address or phone number of yourself or any other person.
- d. Misuse: Report any misuse on the Internet to your teacher/principal.
- e. Electronic Mail (E-mail): Use e-mail for educational purposes only.
- f. Vandalism: Never move, delete, or trash any applications or files that are not yours.
- g. Information: Some information accessed by the use of electronic services may or may not be accurate. The Charter School makes no guarantees of any kind concerning the accuracy of information obtained online

5. Inappropriate Use. Charter School technology, hardware, software and bandwidth are shared and limited resources and all users have an obligation to use those resources responsibly. Students are provided access to the Charter School technology primarily for educational purposes. Students shall not use Charter School technology or equipment for personal activities or for activities that violate school policy or local law. These include but are not limited to:

- a. Playing games or online gaming.
- b. Downloading software, music, movies or other content in violation of licensing requirements, copyright or other intellectual property rights.
- c. Installing software on Charter School equipment without the permission of a teacher or other authorized Charter School staff person.
- d. Downloading, viewing or sharing inappropriate content, including pornographic, defamatory or otherwise offensive material.
- e. Conducting any activity that is in violation of school policy, the student code of conduct or local, state or federal law.
- f. Engaging in any activity that is harmful to other student(s), including the use of technology to harass, intimidate, bully or otherwise disrupt the educational process.
- g. Participating in political activities.
- h. Conducting for-profit business.
- i. Using hacking tools on the network or intentionally introducing malicious code or viruses into the Charter School's network.
- j. Using any software or proxy service to obscure either the student's IP address or the sites that the student visits.
- k. Disabling, bypassing, or attempting to disable or bypass any system monitoring, filtering or other security measures.

I. Accessing or attempting to access material or systems on the network that the student is not authorized to access.

6. No Expectation of Privacy. Student acknowledges that computer equipment, Internet access networks, email accounts, and any other technology resources are owned by Charter School and provided to students for educational purposes. The Charter School may require staff to monitor and supervise all access to computer equipment, Internet access networks, and email accounts. To facilitate monitoring of activities, computer screens may be positioned so that they are visible to the staff member supervising the students. The Charter School reserves the right to access stored computer records and communications, files, and other data stored on Charter School equipment or sent over Charter School networks. Such communications, files, and data are not private and may be accessed during routine system maintenance; during inspection of Charter School equipment at the end of the school year/term or agree to use period; and review of individual files or monitoring of individual activity when there is a reasonable suspicion that the student is engaging in an inappropriate use.

7. Disruptive Activity. Students should not intentionally interfere with the performance of the Charter School's network or intentionally damage any Charter School technology resources.

8. Unauthorized Networks. Students may not create unauthorized wireless networks to access the Charter School's network. This includes establishing wireless access points, wireless routers and open networks on personal devices.

9. Technology Systems/Equipment Care. Students are not permitted to have food or drink near computers/other technology and must keep equipment and assigned areas free of vandalism.

10. Consequences of Inappropriate Use. Students who violate this Agreement will be subject to discipline which may include loss of access to Charter School technology resources and/or other appropriate disciplinary or legal action in accordance with the Student Code of Conduct and applicable laws.

11. Google Suite for Education. Students will have access to and use G Suite for Education. G Suite for Education is a set of education productivity tools from Google Education Core including Gmail, Calendar, Docs, Classroom, and more used by tens of millions students and teachers around the world. Great Valley Academy students will use their G Suite accounts to complete assignments, communicate with their teachers, sign in their Chromebooks, and learn 21st century digital citizenship skills. For information on privacy regarding G Suite for Education, please visit https://gsuite.google.com/terms/education_privacy.html. By agreeing to the Student Use of Technology and Acceptable Use Agreement, you are providing permission for your student to use a G Suite for Education account.

After reading the Student Use of Technology Policy and the Acceptable Use Agreement, please complete the acknowledgement form to indicate your agreement with the terms and conditions provided. The signatures of both the student and parent/guardian are required before access may be granted to the technologies available. This document, which incorporates the Use Procedure, reflects the entire agreement and understanding of all parties.

Morning Drop-off Procedures

Gates open at 8:05 am

Lot A: This lot is reserved for parents planning to park and walk their child to class. This is not a drop-off zone. **Only park in the area designated for GVA parking. Parking beyond this space is reserved for Modesto Christian parking ONLY at All TIMES.** This lot will not be accessible if it is full. There is handicap parking available nearby.

Street Parking: Parking is **NOT** allowed on Sisk Road. Please do not block entrances/exits/road ways. DO NOT park in front of Modesto Christian property.

Drop-off zone: Please utilize! We can accommodate more cars than ever in our new drop-off loop. The entrance is single lane. At the first turn, the road become two lane. The home stretch will accommodate three lanes of cars. Please follow the directions of any and all GVA staff members. Children must remain in cars until a GVA staff member opens their door and invites them out.

Lot C (Office & Kids' Care): This lot is reserved for parents planning to park and walk their child to class. This is not a drop-off zone. Lot C will utilize a separate entrance than that of the drop-off zone. Please follow the direction of lot attendants. **If attempting to exit prior to the end of drop-off time, you must do so as close to Sisk Road as possible.** Again, follow the direction of GVA staff stationed at the exit, as you must work in concert with the flow of traffic within drop-off. **Do NOT attempt to merge with drop-off traffic.**

Lot E: **If parking here in the a.m., you will not be allowed to exit until drop-off is complete at 8:30 am.** This lot is reserved for parents planning to park and walk their child to class. This is not a drop-off zone. Please follow the direction of lot attendants. Entrance to Lot E is accessed at the end of Sisk Road. Exit from Lot E is accessed via the drop-off home stretch.

Kids' Care: If your student arrives prior to 8:05am and does not attend a before school program (i.e., music), they will be sent to Kids' Care and parent/guardian will be charged according to the standard drop-in rates.

Afternoon Pick-up Procedures

Gates open at 3:25 pm or 11:55 am (Fridays)

GVA asks that all K-6 students be picked up at their classroom by a parent/guardian. If you wish to add individuals to your approved pick-up list, you may do so on the Contact Modification form found in the office.

Junior High students: Junior high students are released at the end of the day and do not require parental pick up from the classroom. Until routines are better established, junior high students are invited to wait for parents in the junior high quad area. It may be difficult to tell these students where to meet you, so you may choose to have them wait for you there. If the junior high student has a younger sibling, they are encouraged to go to their sibling's classroom to meet parents there. Please stress to your junior high child how important safety is, particularly regarding parking areas.

Lot A: This lot will best serve parents of 5th – 8th grade students who do not have younger GVA siblings. **Only park in the area designated for GVA parking. Parking beyond this space is reserved for Modesto Christian parking ONLY at All TIMES.** This lot will not be accessible if it is full. There is handicap parking available nearby.

Street Parking: Parking is **NOT** allowed on Sisk Road. Please do not block entrances/exits/road ways. **DO NOT** park in front of Modesto Christian property.

Drop-off: The drop-off loop will not be utilized after school for the first couple of weeks of school. This loop will be utilized for Curb Side Pick Up after families have been identified. Instructions for Curb Side Pick Up will be attached to your labeled tags.

Lot C (Office & Kids' Care): Lot C will utilize a separate entrance than that of the drop-off zone. Please follow the direction of lot attendants.

Lot E: **Lot E will not open until 3:30 pm.** Please follow the direction of lot attendants. Entrance to Lot E is accessed at the end of Sisk Road. Exit from Lot E is accessed via the drop-off home stretch.

Kids' Care: If your child is enrolled in after school Kids' Care, GVA staff will ensure that your child arrives promptly and safely. If your student is not picked-up by 3:45pm, they will be sent to Kids' Care and parent/guardian will be charged according to the standard drop-in rates.

Great Valley Academy



Employee Handbook

July 2022

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Introduction

This Handbook summarizes the Great Valley Academy Charter School's (hereinafter referred to as "School") personnel policies applicable to all employees. Please review these policies carefully. If you have any questions about the policies outlined in this Handbook, or if you have any other personnel related questions, whether related to policies specifically addressed in this Handbook, please consult Payroll/Human Resources Department.

This Handbook is intended only as a guide to the School's personnel policies, outlining and highlighting those policies and practices. It is not, therefore, intended to create any expectations of continued employment, or an employment contract, express or implied. This Handbook supersedes any previously issued handbooks, policies, benefit statements and/or memoranda, whether written or verbal, including those that are inconsistent with the policies described herein.

With the exception of the at-will employment status of its employees, the School reserves the right to alter, modify, amend, delete and/or supplement any employment policy or practice (including, but not limited to, areas involving hiring policies and procedures, general work place policies, hours of work, overtime and attendance, standards of conduct, employee benefits, employment evaluation and separation) with or without notice to you. Only the Chief Executive Officer may alter the at-will employment status of any of its employees.

Once you have reviewed this Handbook, please sign the employee acknowledgement form at the end of this Handbook, and provide to Payroll/Human Resources Department. This signed acknowledgement demonstrates to the School that you have read, understand and agree to comply with the policies outlined in the Handbook. Failure to sign acknowledgement may result in delay of your ability to begin work or termination.

I. Hiring Policies and Procedures

A. At Will Employment

The School is an at-will employer. This Handbook does not in any way reflect a modification to this policy and does not reflect a contract of employment, either express or implied, between you and the School. Accordingly, either you or the School may terminate this relationship at any time, for any reason, with or without cause, and with or without advanced notice.

Nothing contained in this Handbook, employment applications, School memoranda or other materials provided to any employee in connection with his/her employment shall require the School to have "cause" or reason to terminate an employee or otherwise restrict the School's right to terminate an employee at any time for any reason. No School representative is authorized to modify this policy for any employee, unless in writing, signed by the Chief Executive Officer.

This policy shall not be modified by any statements contained in this Handbook or employee applications, School memoranda, or any other materials provided to employees in connection with their employment. Further, none of those documents whether singly or combined, or any employment practices, shall create an express or implied contract of employment for a definite period, nor an express or implied contract concerning any terms or conditions of employment.

B. Equal Employment Opportunity Policy

GVA is an equal opportunity employer. It is the policy of the School to afford equal employment and advancement opportunity to all qualified individuals without regard to:

- Race;
- Color;
- Gender (including gender identity and gender expression);
- Sex (including pregnancy, childbirth, breastfeeding, and medical conditions related to such);
- Religious creed (including religious dress and grooming practices);
- Marital/registered domestic partner status;
- Age (forty (40) and over);
- National origin or ancestry (including native language spoken);
- Physical or mental disability (including HIV and AIDS);
- Medical condition (including cancer and genetic characteristics);
- Taking of a leave of absence pursuant to the Family Medical Leave Act (“FMLA”), Pregnancy Disability Leave (“PDL”) law, Americans with Disabilities Act (“ADA”), California Family Rights Act (“CFRA”), or the Fair Employment and Housing Act (“FEHA”);
- Genetic information;
- Sexual orientation;
- Military and veteran status; or
- Any other consideration made unlawful by federal, state, or local laws.

This policy extends to all employees and to all aspects of the employment relationship, including the hiring of new employees and the training, transfer, promotion, compensation and benefits of existing employees.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the School will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact a School representative with day-to-day personnel responsibilities and request such an accommodation. The individual with the disability should specify what accommodation he or she needs to perform the job. GVA then will conduct an investigation to identify the GVA will identify possible accommodations, if any, that will help eliminate the limitation. If the accommodation is reasonable and will not impose an undue hardship, the School will make the accommodation.

If you believe prohibited discrimination has occurred, please contact your direct supervisor or Payroll/Human Resource Department immediately. Reports will be investigated and appropriate corrective action will be taken.

C. Immigration Compliance

GVA will comply with applicable immigration law, including the Immigration Reform and Control Act of 1986 and the Immigration Act of 1990. As a condition of employment, every individual must provide satisfactory evidence of his or her identity and legal authority to work in the United States. However, GVA will not check the employment authorization status of current employees or applicants who were not offered positions with the School unless required to do so by law.

The School shall not discharge an employee or in any manner discriminate, retaliate, or take any adverse action (e.g., threatening to report the suspected citizenship or immigration status of an employee or a member of the employee's family) against any employee or applicant for employment because the employee or applicant exercised a right protected under applicable law. Further, the School shall not discriminate against any individual because he or she holds or presents a driver's license issued per Vehicle Code § 12801.9 to persons who have not established their federally-authorized presence in the United States.

D. Employee Classification

The School's employees are classified in the following categories: Exempt, non-exempt, and full-time, part-time or temporary.

Exempt: Exempt employees are those employees with job assignments that meet exemption tests under state and federal law, making them exempt from overtime pay requirements. Exempt employees are compensated on a salary basis for all hours worked outside of their general work schedule, and/or remote telework, not pursuant to overtime pay requirements.

Non-Exempt: Non-exempt employees are those employees with job assignments that do not meet exemption tests under state or federal law. Thus, these employees are paid overtime wages for overtime worked in accordance with the law.

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

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

Temporary/On Call: Temporary employees are those employees who are hired for a limited time period, or for a specific project.

Part time or Temporary/On Call employees are not entitled to health benefits provided by the School. Part time or Temporary/On Call employees are entitled to the Sick Leave benefit plan as detailed in the Employee Benefits Section. Independent contractors, consultants and leased employees (i.e., those working for an employment agency) are not employees of the School and are not eligible for benefits provided by the School. If you have any questions about your classification, please consult with Payroll/Human Resource Department.

E. Relationships Between Employees

While the School's policies do not permit discrimination based on an individual's marital status, the individual's relations to another School employee or his or her lawful off duty conduct, some situations can create conflicts of interest requiring the School to take the employee's relationship with another employee into account.

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

A supervisor should avoid forming special social relationships or dating employees under his or her direct supervision, or with other employees that would create actual or perceived conflicts of interest and situations of favoritism. Please note that such consensual relationships may be in violation of the School's Unlawful Harassment, Discrimination and retaliation policy. If such relationship arises, both employees shall notify the

Chief Executive Officer (If CEO is a party; notification shall be made to the Board President or Vice President) so that appropriate measures can be taken to prevent conflicts of interest or favoritism.

The School reserves the right to take appropriate action if employee relationships interfere with the safety, morale or security of the School, or if the relationships create an actual or perceived conflict of interest or favoritism.

F. Internal Job Candidates

Current GVA employees may apply for any internal, open and posted position regardless of current job position. Internal school candidates should notify their supervisor of their intent to apply and will be guaranteed at least a first round interview by the hiring manager for the open position. At no time does GVA guarantee, either expressed or implied, that the internal candidate would be offered or transferred to the open position. There will be no form of retaliation against the employee for applying and interviewing for the open position.

G. Certification and Licensure of Instructional Staff

Each of the School's core academic teachers will be required to hold a current California Commission on Teacher Credentialing certificate, permit or other document equivalent to that which a teacher in other public schools would be required to. It is the responsibility and a condition of continued employment of all instructional staff to maintain and keep current such certificates, permits or other documentation and provide to the Payroll/Human Resource Department no later than the close of business on the first day the employee reports for duty. If an instructional staff employee believes that he or she is assigned to teach in a subject in which he or she does not have subject matter competence, the employee should immediately report the same to the Campus Principal. Staff who are required to meet these state and federal certification, expertise, and related requirements must maintain such qualifications as a condition of employment at the School. Nothing in this section is intended to alter that at-will status of the employee's employment.

All instructional staff shall have a Certificate of Clearance on file with the California Commission on Teacher Credentialing regardless of credential status.

H. Tuberculosis Testing

All employees of the School must submit written proof from a licensed physician of a risk assessment examination or negative test for tuberculosis (TB) within the previous sixty (60) days from date of hire. If TB risk factors are identified, a physician must conduct an examination to determine whether the employee is free of infectious TB. The examination for TB consists of an approved TB test, which, if positive, will be followed by an x-ray of the lungs, or in the absence of skin testing, an x-ray of the lungs. All employees will be required to undergo TB risk assessments at least once every four (4) years. The TB risk assessment and, if indicated, the examination is a condition of initial employment with the School and the cost of the exam will be borne by the applicant. An x-ray exemption is permanent and does not require a four (4) year renewal.

Documentation of employee and volunteer compliance with TB risk assessments and examinations will be kept on file in the office. This requirement also includes contract food handlers, interns, and student teachers serving under the supervision of an educator. Any entity providing student services to the School will be contractually required to ensure that all contract workers have had TB testing that shows them to be free of active TB prior to conducting work with School students.

I. Criminal Background Checks

As a condition of employment, the School requires all applicants for employment to submit fingerprints to the Department of Justice for the purpose of obtaining criminal record summary information from the Department of Justice and Federal Bureau of Investigation. The School will not employ a person who has been convicted of a violent or serious felony or a person who would be prohibited from employment by a public school district because of his or her conviction for any crime, including for convictions of a controlled substance or sex offenses. Potential or current employees with adverse background information may be ineligible for employment with the School. The School will not employ any applicant until the Department of Justice completes its check of the state criminal history file as provided by law. The School shall also request subsequent arrest notification from the Department of Justice and take all necessary action based upon such further notification. Every new employee shall be required to provide fingerprint clearance through the Dept. of Justice/FBI (Live Scan) process. The results of the Live Scan must be received prior to the first day of work. Failure to receive the Live Scan results will result in a delay of your ability to begin work or termination. Employee will be required to use the GVA approved Live Scan Vendor.

J. Child Neglect and Abuse Reporting

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident.

GVA will provide annual training on the mandated reporting requirements, using an online training module to employees who are mandated reporters. Mandated reporter training will also be provided to employees hired during the course of the school year. This training will include information that failure to report an incident of known or reasonably suspected child abuse or neglect, as required by Penal Code section 11166, is a misdemeanor punishable by up to six (6) months confinement in a county jail, or by a fine of one-thousand dollars (\$1,000), or by both that imprisonment and fine.

All employees required to receive mandated reporter training must provide proof of completing the training within the first six (6) weeks of each school year or within the first six (6) weeks of that employee's employment.

By acknowledging receipt of this Handbook, employees acknowledge they are child care custodians and are certifying that they have knowledge of California Penal Code section 11166 and will comply with its provisions

Reporting the information regarding a case of possible child abuse or neglect to your supervisor, the School principal, coworker or other person shall not be a substitute for making a mandated report to Child Protective Services.

II. General Workplace Policies

A. Prohibition of Unlawful Harassment, Discrimination, and Retaliation

1. Harassment Policy

GVA is committed to providing a work and educational atmosphere that is free of unlawful harassment, discrimination, and retaliation. GVA's policy prohibits unlawful harassment, discrimination, and retaliation

based upon: race; color; gender (including gender identity and gender expression); sex (including pregnancy, childbirth, breastfeeding, and related medical conditions); religious creed (including religious dress and grooming practices); marital/registered domestic partner status; age (forty (40) and over); national origin or ancestry (including native language spoken); physical or mental disability (including HIV and AIDS); medical condition (including cancer and genetic characteristics); taking a leave of absence authorized by law; genetic information; sexual orientation; military and veteran status; or any other consideration made unlawful by federal, state, or local laws.

Employees, volunteers, unpaid interns, individuals in apprenticeship programs, and independent contractors shall not be harassed, or discriminated or retaliated against, based upon the characteristics noted above.

The School does not condone and will not tolerate unlawful harassment, discrimination, or retaliation on the part of any employee (including supervisors and managers) or third party (including independent contractors or other person with which the School does business). Supervisors and managers are to report any complaints of unlawful harassment to the Principal or designee.

When the School receives allegations of unlawful harassment, discrimination, or retaliation, the Board (if a complaint is about the CEO) or the CEO or designee will conduct a fair, timely and thorough investigation that provides all parties an appropriate process and reaches reasonable conclusions based on the evidence collected. The investigation will be handled in as confidential a manner as possible, although complete confidentiality cannot be guaranteed. Complainants and witnesses shall not be subject to retaliation for making complaints in good faith or participating in an investigation. GVA is committed to remediating any instances where investigation findings demonstrate unlawful harassment, discrimination, or retaliation has occurred.

2. Definition of Harassment

Harassment includes verbal, physical or visual conduct that creates an intimidating, offensive or hostile working or educational environment or that unreasonably interferes with job performance. Verbal harassment includes, but is not limited to, epithets, derogatory comments or slurs based on a protected category. Physical harassment includes, but is not limited to, assault, impeding or blocking movement or any physical interference with normal work or movement, when directed at a legally protected individual. Visual harassment includes, but is not limited to, derogatory posters, cartoons or drawings on a basis protected by law.

3. Definition of Sexual Harassment

Federal law defines sexual harassment as unwelcome sexual conduct that is a term or condition of employment. The Equal Employment Opportunity Commission's Guidelines define two types of sexual harassment: "quid pro quo" and "hostile environment." "Unwelcome" sexual conduct constitutes sexual harassment when "submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment," "Quid pro quo harassment" occurs when "submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual." A "hostile environment" claim for harassment occurs when discrimination based on sex has created a hostile or abusive work environment.

California law defines unlawful sexual harassment in largely the same ways. Sexual harassment occurs where a term of employment (i.e., compensation or in terms, conditions or privileges of employment), academic status or progress (i.e., a student's grades or promotion to the next grade) is explicitly or implicitly conditioned upon submission to unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, regardless of whether or not the conduct is motivated by sexual desire, as more fully described

below. Sexual harassment also occurs where the submission to, or rejection of, the conduct by the individual is used as the basis of academic or employment decisions affecting the individual. Additionally, sexual harassment occurs where harassment (unwanted sexual advances, visual, verbal or physical conduct of a sexual nature) is sufficiently severe, persistent, pervasive or objectively offensive so as to alter or interfere with the conditions of employment and create an abusive or hostile educational or working environment or to interfere with or limit the individual's ability to participate in or benefit from an educational program or activity. Sexual harassment occurs where the conduct has the purpose or effect of having a negative impact on the individual's academic performance, work or progress or has the purpose or effect of creating an intimidating, hostile, or offensive educational or working environment. Finally, sexual harassment occurs where submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs or activities available at or through the School.

The educational environment includes, but is not limited to, the School's campus or grounds, the properties controlled or owned by the School and off-campus, if such activity is School sponsored or is conducted by organizations sponsored by or under the jurisdiction of the School.

The following are examples of offensive behavior:

- Unwanted sexual advances, flirtations, touching or requests for sexual favors;
 - Preferential treatment or promises of preferential treatment to an employee for submitting to sexual conduct, including soliciting or attempting to solicit any employee to engage in sexual activity for compensation or reward or disparate treatment for rejecting sexual conduct.
 - Subjecting or threats of subjecting an employee to unwelcome sexual attention or conduct or intentionally making performance of the employee's job more difficult because of the employee's sex.
- Verbal abuse of a sexual nature;
- Graphic or suggestive comments about dress or body and the sexual uses to which it could be put;
- Unwarranted graphic discussion of sexual acts;
- Sexually degrading words;
- Suggestive or obscene letters, notes or invitations;
- Verbal harassment including, but not limited to, unwelcome epithets, jokes, derogatory comments, or slurs of a sexual nature, sexually degrading words used to describe a person, sexuality, or their sexual experience;
- Physical harassment including, but not limited to, assault, impeding or blocking movement or any physical interference with normal work or school activities or movement, when done because of your sex;
 - Rape, sexual battery, molestation or attempts to commit these assaults and
 - Intentional physical conduct that is sexual in nature, such as touching, pinching, patting, grabbing, brushing against another's body, or poking another's body
- Making or threatening retaliatory action after receiving a negative response to sexual advances;

- Visual harassment including sexual or discriminatory displays or publications anywhere at the workplace by employees, such as:
 - Displaying pictures, cartoons, posters, calendars, graffiti, objections, promotional materials, reading materials, or other materials that are sexually suggestive, sexually demeaning or pornographic or bringing to work or possessing any such material to read, display or view at work;
 - Reading publicly or otherwise publicizing in the work environment materials that are in any way sexually revealing, sexually suggestive, sexually demeaning or pornographic; and
 - Displaying signs or other materials purporting to segregate an employee by sex in an area of the workplace (other than restrooms or similar rooms).

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

4. What to do if Sexual and Other Unlawful Harassment Occurs

Internal Procedures:

School Level Investigation: Campus Administrators and employees alike have the responsibility to maintain a work place and educational environment free from any form of sexual or other unlawful harassment. Any employee who has experienced or is aware of a situation that is believed to be sexually or otherwise unlawfully harassing has a responsibility to report the situation immediately to the Campus Administrator contacts below. Should Campus Administrators become aware of any conduct that may constitute unlawful harassment, discrimination or other prohibited behavior, immediate action will be taken to address and remediate such conduct.

Suspected unlawful harassment should be reported immediately to:

Campus Principal or Vice Principal

(Modesto Campus: 3200 Tully Road, Modesto, CA 95350 – 209-576-2283)

(Salida Campus: 5901 Sisk Road Modesto, CA 95356 – 209-545-7500)

(Homeschool Office: 1209 Woodrow Ave. Suite C-1 Modesto, CA 95350 – 209-576-2233)

If the employee is not comfortable contacting Campus Principal or Vice Principal or if that individual is not available, the employee should contact:

Chief Executive Officer

(Modesto Campus: 3200 Tully Road, Modesto, CA 209-576-2283)

The Chief Executive Officer will conduct a prompt investigation and take appropriate corrective action where warranted. Complaints will be handled as discreetly as possible, consistent with the need to investigate effectively and promptly resolve the matter.

Any employee found to have participated in harassment or discrimination will be subject to disciplinary action, up to and including termination.

Training: All supervisors of staff will receive sexual harassment, discrimination, and retaliation training within six (6) months of their assumption of a supervisory position and will receive further training once every two (2)

years thereafter. Such training will address all legally required topics, including information about the negative effects that abusive conduct has on both the victim of the conduct and others in the workplace, as well as methods to prevent abusive conduct undertaken with malice a reasonable person would find hostile, offensive, and unrelated to an employer's legitimate business interests. Abusive conduct includes but is not limited to repeated infliction of verbal abuse, such as the use of derogatory remarks, insults, and epithets, verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating, or the gratuitous sabotage or undermining of a person's work performance. Supervisors shall also be trained on how to appropriately respond when the supervisor becomes aware that an employee is the target of unlawful harassment. All other staff will receive sexual harassment training and/or instruction annually concerning sexual harassment in the workplace.

B. Whistleblower Policy

Great Valley Academy (GVA) is committed to operating in furtherance of its tax-exempt purposes and in compliance with all applicable laws, rules and regulations, including those concerning accounting and auditing, and prohibits fraudulent practices by any of its board members, officers, employees, or volunteers. This policy outlines a procedure for employees to report actions that an employee reasonably believes violates a law, or regulation or that constitutes fraudulent accounting or other practices. This policy applies to any matter which is related to GVA's business and does not relate to private acts of an individual not connected to the business of GVA.

If an employee has a reasonable belief that an employee or GVA has engaged in any action that violates any applicable law, or regulation, including those concerning accounting and auditing, or constitutes a fraudulent practice, the employee is expected to immediately report such information to his or her supervisor. If the employee does not feel comfortable reporting the information to his or her supervisor, he or she is expected to report the information to the CEO.

All reports will be followed up promptly, and an investigation conducted. In conducting its investigations, GVA will strive to keep the identity of the complaining individual as confidential as possible, while conducting an adequate review and investigation.

GVA will not retaliate against an employee in the terms and conditions of employment because that employee: (a) reports to a supervisor, to the CEO, the Board of Directors or to a federal, state or local agency what the employee believes in good faith to be a violation of the law; or (b) participates in good faith in any resulting investigation or proceeding, or (c) exercises his or her rights under any state or federal law(s) or regulation(s) to pursue a claim or take legal action to protect the employee's rights.

GVA may take disciplinary action (up to and including termination) against an employee who in management's assessment has engaged in retaliatory conduct in violation of this policy.

In addition, GVA will not, with the intent to retaliate, take any action harmful to any employee who has provided to law enforcement personnel or a court truthful information relating to the commission or possible commission by GVA or any of its employees of a violation of any applicable law or regulation.

C. Lactation Accommodations

An employee may request an accommodation for lactation breaks by submitting a lactation accommodation request to her department supervisor or designee. The department supervisor or designee must respond to the employee's accommodation request in writing.

GVA accommodates lactating employees by providing a reasonable amount of break time to any employee who desires to express breast milk for an infant child. The break time shall, if possible, run concurrently with any break time already provided to the employee. Any break time provided to express breast milk that does not run concurrently with break time already provided to the non-exempt employee shall be unpaid.

GVA will make reasonable efforts to provide employees who need a lactation accommodation with the use of a room (other than a bathroom) or other private location that is located close to the employee's work area. Employees with private offices will be required to use their offices to express breast milk. The lactation space shall be:

- Safe, clean and free of toxic or hazardous materials;
- Contain a surface to place a breast pump and other personal items;
- Contain seating;
- Have access to electricity allowing operation of an electric breast pump;
- Provide reasonable proximity to a sink with running water; and
- Refrigerator suitable for storing breast milk.

Employees have the right to file a complaint with the labor commission for any violation of rights provided under Chapter 3.8 of the California Labor Code regarding lactation accommodations.

D. Workplace Violence

The School takes the safety and security of its employees seriously. The School does not tolerate acts or threats of physical violence, including but not limited to intimidation, harassment and/or coercion, that involve or affect the School or that occur, or are likely to occur, on School property. You should report any act or threat of violence immediately to the Campus Principal or Vice Principal.

E. Open Door Policy

The School wishes to provide the most positive and productive work environment possible. To that end, it has an open door policy where it welcomes your questions, suggestions or complaints relating to your job, conditions of employment, the School or the treatment you are receiving. Other than in situations involving harassment (as outlined and described above), please contact your supervisor with your questions or concerns. If the situation is not resolved to your satisfaction, please contact Payroll/Human Resource Department in writing, who will further investigate the issue.

F. Drug and Alcohol Free Workplace

It is the School's policy to maintain a drug and alcohol-free workplace. GVA is committed to providing a drug and alcohol free workplace and to promoting safety in the workplace, employee health and well-being, customer confidence and a work environment that is conducive to attaining high work standards. The use of drugs and alcohol by employees, whether on or off the job, jeopardizes these goals, since it adversely affects health and safety, security, productivity, and public confidence and trust. Drug or alcohol use in the workplace or during the performance of job duties is extremely harmful to workers and to other GVA stakeholders.

The bringing to the workplace, possession or use of intoxicating beverages or drugs on any School premises or during the performance of work duties is prohibited and will result in disciplinary action up to and including termination.

G. Tobacco Free Workplace

All School buildings and facilities are tobacco-free facilities.

H. Gun and Weapon Free Workplace

Pursuant to Penal Code 626.9 known as the Gun-Free School Zone Act of 1995, any person who possess a firearm in a place that the person knows, or reasonably should know, is a school zone, shall be punished according to PC 626.9.f. A “school zone” means an area in, or on the grounds of, a public or private school providing instruction in kindergarten or grades 1 – 12, inclusive, or within a distant of 1,000 feet from the grounds of the public or private school. Great Valley Academy has zero tolerance for gun and weapon possessions on campus or GVA sponsored events. Local authorities will be contacted for any violation.

I. Health, Safety and Security Policies

GVA recognizes that students and staff have the right to a safe and secure campus where they are free from physical and psychological harm. The Board is fully committed to maximizing school safety and creating a positive learning environment that teaches strategies for violence prevention and emphasizes high expectations for student conduct, responsible behavior, and respect for others. Accordingly, GVA has developed a safety plan in order to have specific procedures in place in case of an emergency.

The Board shall review the comprehensive district wide and/or school safety plan(s) as part of its review process. Approval of the plan shall occur at a regularly scheduled meeting.

A copy of the comprehensive school safety plan shall be available for review at the Great Valley Academy and school administration offices.

- **General Safety and Security Protocols**

GVA has developed guidelines to help maintain a secure workplace. Be aware of unknown persons loitering in parking areas, walkways, entrances and exits and service areas. Report any suspicious persons or activities to the Principal. Employee desk or office should be secured at the end of the day. When an employee is called away from his or her work area for an extended length of time, valuable or personal articles should not be left around a work station that may be accessible. The security of facilities as well as the welfare of employees depends upon the alertness and sensitivity of every individual to potential security risks. Employees should immediately notify the Principal when keys are missing or if security access codes or passes have been breached.

- **Occupational Safety**

GVA is committed to the safety of its employees, vendors, contractors and the public and to providing a clear safety goal for management.

The prevention of accidents is the responsibility of every School supervisor. It is also the duty of all employees to accept and promote the established safety regulations and procedures. Every effort will be made to provide adequate safety training. If an employee is ever in doubt how to perform a job or task safely, assistance should be requested. Unsafe conditions must be reported immediately.

It is the policy of the School that accident prevention shall be considered of primary importance in all phases of operation and administration. GVA is required to provide safe and healthy working conditions for all employees and to establish and require the use of safe practices at all times.

Failure to comply with or enforce School safety and health rules, practices and procedures could result in disciplinary action up to and including possible termination.

- **Accident/Incident Reporting**

It is the duty of every employee to immediately or as soon as is practical report any accident or injury occurring during work or on School premises to Human Resources so that arrangements can be made for medical or first aid treatment, as well as for investigation and follow-up purposes. For all severe and head injuries, incident must be reported to administration immediately and an incident report completed.

- **Reporting Fires and Emergencies**

It is the duty of every employee to know how to report fires and other emergencies quickly and accurately. Employees should report any such emergency by calling management. In addition, all employees should know the local emergency numbers such as 911.

J. Company Property Inspections

The School is committed to providing a work environment that is safe and free of illegal drugs, alcohol, firearms, explosives and other improper materials. Additionally, the School provides property and facilities to its employees to carry out business on behalf of the School. Accordingly, employees do not have a reasonable expectation of privacy when using any School property or facilities. In accordance with these policies, all School facilities and property, including all items contained therein, may be inspected by the School at any time, with or without prior notice to the employee. School property includes but is not limited to all desks, storage areas, work stations, lockers, file cabinets, computers, telephone systems, email systems and other school provided storage devices.

The School also reserves the right to inspect any vehicle, its trunk, glove compartment or any container therein that is parked on the School property or premises, as necessary. The School reserves the right to deny entry to any person who refuses to cooperate with any inspections by the School. Any employee who fails to cooperate with inspections may be subject to disciplinary action, up to and including termination.

K. Soliciting/Conducting Personal Business While on Duty

Employees are not permitted to conduct personal business or solicit personal business for any cause or organization while on-duty, or when the employee being solicited is supposed to be working. This prohibition includes distributing literature and other material via all communication methods including e-mail. Distribution of materials is also against the School's policy if it interferes with access to facility premises, if it results in undue litter or is conducted in a manner that is unduly disruptive to employees during their work hours. Solicitation during non-work time, e.g., paid breaks, lunch periods or other such non-work periods, is permissible but not via e-mail. Entry on the School premises by non-employees is not permitted, unless related to official School business and all visitors must follow the School visitor protocols. Solicitation or distribution of written materials by non-employees is strictly prohibited.

L. Use of Company Communication Equipment and Technology

All School owned communications equipment and technology, including but not limited to computers, electronic mail systems, voicemail systems, internet access, software, telephone systems, document transmission systems and handheld data processing systems remain the property of the School and are provided to the employee to carry out business on behalf of the School, unless previously authorized for non-business use. Employees have no expectation of privacy in any communications made using School owned equipment, technology and network system. Communications (including any attached message or data) made using School owned communications equipment and technology are subject to review, inspection and monitoring by the School including but not limited to internet usage.

Additionally, the School uses technology protection measures that protect against Internet access (by both minors and adults) of visual depictions that are obscene, child pornography and/or with respect to use by minors, internet access harmful to minors. These measures may include, but are not limited to, installing a blocking system to block specific internet sites, setting Internet browsers to block access to adult sites, using a filtering system that will filter all Internet traffic and report potential instances of misuse and using a spam filter.

All employees are required to safeguard their passwords to limit unauthorized use of computers by minors in accordance with the Student Internet Use Policy and Agreement. Employees that do not safeguard their passwords from unauthorized student use, or that allow a student to access computers in violation of the Student Internet Use Policy and Agreement, will be subject to discipline, up to and including termination.

Internet use is for business, as well as reasonable and limited personal use. All employees using the internet through the School's communications equipment and technology must respect all copyright laws. Employees are not permitted to copy, retrieve, modify or forward copyrighted materials unless authorized by law or with express written permission of the owner of the copyright. Employees are not permitted to use the School's communications equipment and technology to view visual images that are obscene, child pornography and/or images harmful to minors.

The e-mail system and internet access is not to be used in any way that may be disruptive, harassing or offensive to others, illegal or harmful to morale. For example, sexually explicit images, ethnic slurs, racial epithets or anything else that may be construed as harassment or disparagement of others based on their race, national origin, gender, sexual orientation, age, religious beliefs or political beliefs may not be displayed or transmitted. The e-mail system and internet access is not to be used in any manner that is against the policies of the School, contrary to the best interest of the School or for personal gain or profit of the employee against the interests of the School. Employees must not use the School's communications equipment and technology for the unauthorized disclosure, use and dissemination of personal information regarding students.

Employees should not attempt to gain access to another employee's email files or voicemail messages without the latter's express permission. Each employee is responsible for the content of the messages sent out using his/her School issued equipment. It is strictly prohibited to use another employee's computer to send messages to create the appearance that they are from that employee, unless that employee expressly authorizes such use.

The School does require that employees check their school provided e-mail on at least a weekly basis during the school year and suggests periodically checking e-mail over scheduled school breaks. If the employee is not assigned a school e-mail (such as on-call/temporary employees), the school suggests periodically checking their personal e-mail for important communications from the school.

M. Employee Blogs and Social Media

If an employee decides to keep a personal blog or posting, or use other social media, that discusses any aspect of his/her workplace activities, the following restrictions apply:

- School equipment, including its computers and electronics systems, may not be used for these purposes;
- Student and employee confidentiality policies must be adhered to;
- Employees must make clear that the views expressed in their blogs are their own and not those of the School;
- Employees may not use the School's logos, trademarks and/or copyrighted material and are not authorized to speak on the School's behalf, unless authorized in writing by the CEO or COO;
- Employees are not authorized to publish any confidential information maintained by the School;
- Employees are prohibited from making discriminatory, defamatory, libelous or slanderous comments when discussing the School, the employee's supervisors, co-workers and competitors;
- Employees must comply with all School policies, including, but not limited to, rules against sexual harassment and retaliation

The School reserves the right to take disciplinary action against any employee whose blog or posting violates this or other School policies.

N. Participation in Recreational or Social Activities

Employees may participate in activities sponsored by or supported by the School. Participation in such activities is strictly voluntary. As such, employees have no obligation to participate in recreational or social activities and no employee has work-related duties requiring such participation. An employee's participation in social and recreational activities is at the employee's own risk and the School disclaims any and all liability arising out of the employee's participation in these activities.

O. Personnel Files and Record Keeping Protocols

At the time of your employment, a personnel file is established for you. Please keep Payroll/Human Resource Department advised of changes that should be reflected in your personnel file. Such changes include: change in name, address, telephone number, marital status, number of dependents and person(s) to notify in case of emergency. Prompt notification of these changes is essential and will enable the School to contact you should the change affect your other records.

An employee or former employee (or designee) has the right to inspect or receive a copy of his or her personnel records in writing, at reasonable times, at a reasonable place, and on reasonable advance notice to the Payroll/Human Resource Department. You also have the right to obtain a copy of your personnel file as provided by law. You may add your comments to any disputed item in the file. The School will restrict disclosure of your personnel file to authorized individuals within the School. Employer will respond to such a request within 30 days of receipt of the written request. Only Human Resources is authorized to release information about current or former employees. Disclosure of information to outside sources will be limited. However, the School will

cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations or as otherwise legally required.

Credible complaints of substantiated investigations into or discipline for egregious misconduct will not be expunged from an employee's personnel file unless the complaint is heard by an arbitrator, administrative law judge, or the Board and the complaint is deemed to be false, not credible, unsubstantiated or a determination was made that discipline was not warranted.

P. Use of Personal Vehicles for Company Purposes

Occasionally GVA employees may use personal vehicles for school business purposes. It is understood by all employees that should an accident or damage occur to the vehicle while being used for business purposes, the employee personal automobile insurance policy is always the primary insurance.

Q. Personal Property on School Grounds

GVA is not responsible for the loss, theft or damage of personal property that is used or stored on school grounds. This includes cars parked on GVA property and parking lots.

R. Child Protective Services (CPS) Reporting & Response

Board Policy – 2019.046 Adopted February 2019

California Penal Code section 11166(a) requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows, or reasonably suspects has been the victim of child abuse or neglect, to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident.

Training

Great Valley Academy ("GVA" or the "School") will provide annual training on the mandated reporting requirements, using an online training module to employees who are mandated reporters. Mandated reporter training will also be provided to employees hired during the course of the school year. This training will include information that failure to report an incident of known or reasonably suspected child abuse or neglect, as required by Penal Code section 11166, is a misdemeanor punishable by up to six (6) months confinement in a county jail, or by a fine of one-thousand dollars (\$1,000), or by both that imprisonment and fine.

All employees required to receive mandated reporter training must provide proof of completing the training within the first six (6) weeks of each school year or within the first six (6) weeks of that employee's employment. GVA provides this training via online training module.

Agency Reporting

Any employee who, in their work capacity, observes or suspects that an incident, behavior, or conduct may be an indication of child abuse, shall within thirty-six (36) hours: (1) make a telephone report of the suspected child abuse to the Stanislaus County Community Services Agency at (209) 558-3665, and (2) complete and send

Department of Justice Form 55 8572 “Suspected Child Abuse Report” to the same agency. The employee shall also report the same information to law enforcement within thirty-six (36) hours.

As outlined within GVA Board Resolution 2018.043, the School will not contact CPS to assist students whose parents have been detained on immigration charges or deported until GVA has exhausted all other avenues.

Internal Reporting

The mandated reporter shall not be required to disclose his/her identity to his/her supervisor, the Principal, or the Chief Executive Officer or designee.

However, employees reporting suspected child abuse or neglect are encouraged to notify the Principal by email or anonymous letter as soon as possible after the initial reports to the Community Services Agency and law enforcement, including by providing a summary of the suspected conduct and an affirmation that the appropriate agencies have been notified. While not required, this notice will help GVA protect the safety of the child involved. Thereafter, the Principal shall inform the Chief Executive Officer or designee of the suspected abuse. Further, mandated reporters are encouraged to seek assistance and guidance from the School as needed.

Reporting a case of possible child abuse or neglect to a supervisor, the school Principal, coworker or other person shall not be a substitute for making a mandated report to the Community Services Agency and law enforcement.

Interviews

GVA shall permit law enforcement and children’s welfare-related services on campus with proper identification and proof of an authorized student safety-related purpose to investigate claims of child abuse or neglect. All visitors are required to adhere to School policies for visitors and to sign-in and out of the campus visitor’s log.

Whenever the School, in combination with a representative of a public agency investigating suspected child abuse or neglect, deems it necessary, a suspected victim of child abuse or neglect may be interviewed during school hours, on school premises, regarding a report of suspected child abuse or neglect.

The child shall be afforded the option of being interviewed in private or selecting an adult employee of the School, including any certificated or classified employee, to be present at the interview. A representative of the public agency investigating suspected child abuse or neglect shall inform the child of that option, prior to the interview.

The purpose of the GVA employee’s presence at the interview is to lend support to the child and enable him/her to be as comfortable as possible, but the employee may not participate in the interview. The GVA employee shall not further discuss the facts or circumstances of the case with the child, and is subject to the confidentiality requirements set forth in this Policy. The School shall inform the GVA employee selected by a child of the requirements of this Policy prior to the interview. The GVA employee selected by the child may decline the request to be present at the interview. If the GVA employee agrees to be present, the interview shall be held at a time during School hours when it does not involve an overtime expense to the School.

Release of Child to a Peace Officer

When a child is released to a peace officer and taken into custody as a victim of suspected child abuse or neglect, the Chief Executive Officer or designee and/or Principal shall not notify the parent/guardian, but rather GVA

shall provide the peace officer with the address and telephone number of the child's parent/guardian and the peace officer will notify the parent/guardian.

Parent/Guardian Involvement

In the case of suspected child abuse or neglect, a parent/guardian does not have the right to be informed of the report to the investigating public service agency and should not be informed by School personnel. The investigating public service agency will be responsible for providing any such information to the parent/guardian.

Confidentiality

Confidentiality is crucial to such cases and must be enforced at all times in order to protect the child. At no time should the details or circumstances of suspected abuse or neglect be disclosed, except as needed to promote the safety of the child, and in compliance with the law and this Policy. All copies of written reports of suspected abuse or neglect made to the School will be maintained and secured by the Chief Executive Officer's executive staff. Any employee found to have breached confidentiality may be subject to disciplinary action, up to and including termination.

Q. Telework

Board Policy – 2020.056 Adopted June 2020

Great Valley Academy (the "School") recognizes approved teleworking as a necessary work arrangement during specific times or upon request of an employee. This policy details conditions and requirements which apply to all telework assignments.

Definition

Teleworking allows employees to work at home or in an approved remote location for all or part of their regular workweek. Teleworking is not an entitlement, nor is it a school-wide benefit. This arrangement in no way alters or changes the terms and conditions of employment with the School, and the promulgation of this Policy creates no employee rights in relation to teleworking. Furthermore, the School has the right to refuse to make telework available to an employee and to terminate a telework assignment without cause at any time in its sole and unreviewable discretion.

General Requirements

Employees shall not telework unless they receive advance written approval from the School. Employees shall make arrangements with their supervisor and co-workers to address on-site job demands that arise, including returning to the work site to perform certain job duties as needed or as directed by their supervisor. Employees shall be responsible for following all School policies and procedures when teleworking. Employees shall also be solely responsible for the performance of their telework duties; assistance from third parties is strictly prohibited.

Nonexempt employees will be required to (1) record all hours worked as assigned by the School and (2) take and document applicable meal/rest periods. Nonexempt employees must also receive written approval from a supervisor prior to working additional hours or overtime. Failure to comply with timekeeping and work hours requirements may result in disciplinary action, up to and including termination from employment.

Eligibility Considerations

Consideration will be given to employees who work in positions adaptable for telework assignments, particularly those who have demonstrated work habits and performance well-suited to successful teleworking. In the sole discretion of the School and its management, the following eligibility factors will be considered:

- The employee has a position where effective communication can be accommodated electronically;
- The employee's telework assignment will not be detrimental to the productivity or work quality of other employees or the effective operation of the School;
- The employee must be able to perform work from home or an approved remote location without distractions or unnecessary risk to the security of School data, records, networks, or confidentiality generally;
- The employee's equipment and software must meet the School's guidelines/standards, and the employee's needs for Information Technology ("IT") support must be minimal;
- Telework sites must be in California;
- The employee must be effective at working independently for extended periods of time;
- The employee has demonstrated or can demonstrate effective time-management skills by completing tasks efficiently and within any required deadlines;
- The employee must maintain connections with work groups or teams from their remote work location; and
- The employee has no recent or pending corrective or disciplinary actions.

Supervisor Responsibilities

Supervisors managing employees who have been permitted to telework must effectively:

- Implement the telework policy/guidelines;
- Conduct remote supervision;
- Understand the technology and tools necessary for successful remote supervision; and
- Establish communication protocols with telework employees, including making continued efforts to involve teleworking employees in office/department events, messages, etc. as applicable to preserve teamwork.

Supervisors will assess each employee's progress on a telework assignment periodically to ensure the employee's compliance with telework requirements, and address any work-related issues, including completing evaluations and other performance management as appropriate.

Communication and Accessibility

Employees and supervisors must determine how communication between the teleworking employee, the worksite, and/or other employees also teleworking will be handled. Employees shall keep their supervisor and as needed, their co-workers or other School stakeholders (e.g., students and/or parents), informed of their availability so these individuals know how and when to reach the employee during the employee's telework assignment. Employees must be accessible by phone and email at all times to their supervisor, co-workers, School stakeholders, and the School generally during assigned work hours. Employees must notify their supervisors if they leave their telework site during agreed upon hours, aside from applicable meal and rest periods. Employees must post their telework schedule on their calendar, including applicable meal and rest periods. Employees must

also remain flexible in their scheduling, and shall be available to attend staff meetings and other meetings as required by their supervisor.

Safety

The telework space is considered an extension of the School's worksite. Employees will have the same responsibility for safe practices, accident prevention, and accident/injury reporting as in the regular worksite. In case of injury, accident, theft, loss, or tort liability related to telework, the employee must immediately report the event to their supervisor and allow the School or its authorized agent to investigate and/or inspect the telework site as needed.

Employees are responsible for establishing and maintaining a designated, adequate workspace at their telework location. When the telework location is the employee's home, the employee is responsible for ensuring the location is safe (free from hazards and other dangers to the employee or equipment), clean, professional, and free of distractions (e.g., children, pets, electronic devices, etc.).

Supplies, Equipment, and Furniture

The School will determine, with information supplied by the employee and the supervisor, the appropriate equipment needs (including hardware, software, modems, phone and data lines, facsimile equipment or software, and photocopiers) for each telework assignment on a case-by-case basis. The School will not provide office furniture for the workspace at home.

For those employees with School supplied and maintained technology equipment, it is to be used for work purposes only. Employees must sign an inventory of all School property and agree to protect the items from damage or theft. Employees shall not be entitled to reimbursement for their use of School property. Employees shall be held liable to the School whenever their wrongful or negligent act or omission causes loss, theft, disappearance, damage to, or destruction of School property. Upon cessation of a telework assignment, all School property must be returned to the School.

For those employees who do not have School issued technology equipment, all necessary technology shall be supplied by the employee. All technology supplied by the employee shall be maintained by the employee. The School accepts no responsibility for damage or repairs to employee-owned equipment. Employees who supply personal technology for School-related use shall be eligible for reimbursement for the use of their technology pursuant to the "Reimbursement" section below.

Allowance

The School shall provide an employee allowance for actual and necessary expenses incurred in the employee carrying out School business when such expenses are expressly authorized and preapproved by the School.

INTERNET ALLOWANCE: The School shall provide an allowance of costs for internet at \$10 per month, based upon a reasonable percentage of work-related use.

CELL PHONE ALLOWANCE: The School shall provide an allowance of costs for cell phone bill at \$10 per month, based upon a reasonable percentage of work-related use. Phone expenses are limited to the *employee's share* of the plan, taxes, and access fees. (i.e., an employee on a "family plan" may receive reimbursement only for the cost of their phone line).

Employees who believe their expenses exceed the allowance the School provides shall be required to submit copies of their internet and/or cell phone bill for review. Such bills may be redacted as needed to remove any private/confidential information.

Information Security and Confidentiality

Employees must never provide any third parties access to the School network or share network access passwords, and must comply with all policies and procedures related to information security and network access.

Consistent with the School's expectations of information security for employees working at the office, teleworking employees must ensure that their telework location is secure and communications provided or sensitive work performed from the telework location remain confidential, away from the presence of family members or guests. Any School materials taken home, such as confidential personnel or pupil records, must be kept in a secure space within the telework location and not be made accessible to any third parties, including the employee's family members or guests. Steps which employees may take to increase security of School materials/information include use of locked file cabinets and desks, regular password maintenance, shielding computer monitors, and any other actions appropriate for the position and the telework location.

Performance Standards

Employees must maintain the same or an improved level of productivity and work quality while teleworking. If productivity and/or work quality begin to decline, the telework assignment will be reevaluated to determine if changes can be made or termination of the telework assignment is warranted. Telework allows a high amount of flexibility for an employee to complete their work in a timely and proper manner, and it is expected that employees will not abuse this opportunity by allowing their productivity or work quality to decline.

Professional Boundaries

Employees must maintain appropriate levels of professionalism when interacting remotely with students and/or student's family members in full compliance with the School's "Professional Boundaries: Staff/Student Interaction" policy and as summarized below:

- Limit communications with students to issues involving School activities or classes only;
- Ensure professional communications with students by avoiding conversations of an overly personal, inappropriate, sexual, offensive, or indecent nature;
- Respect the privacy rights of students by ensuring communications and/or documents involving confidential pupil information are safeguarded appropriately;
- Maintain the same degree of formality as would be appropriate when working on-site, including in manner of speech, tone, method of communication, and appearance and dress, particularly when the employee may be communicating with students via video chat; and
- Continue to comply with any and all School policies, including enforcing appropriate student behavior and student discipline, child abuse and neglect reporting protocols, and prohibitions on harassment or other inappropriate conduct.

For a copy of the School's Policy, please visit

https://www.greatvalleyacademy.com/protected/files/6717/file/great-valley-academy-student_staff-interaction-2019.047-final.pdf

Employees who fail to demonstrate acceptable professional boundaries during a telework assignment may be subject to disciplinary action, up to and including termination from employment.

Evaluation & Duration

Evaluation of employee performance during the teleworking assignment may include daily interaction by video, phone and/or email between the employee and the supervisor, and weekly face-to-face and/or video meetings whenever possible to discuss work progress and problems, as needed.

The School may modify or terminate telework assignments at any time, with or without cause or advance notice. Although not required, the School shall endeavor to provide seven (7) days' notice of the modification or termination of any telework assignment whenever possible.

Ad Hoc Arrangements

Temporary telecommuting arrangements may be approved for circumstances such as inclement weather, special projects, pandemics or business travel. These arrangements are approved on an as-needed basis only, with no expectation of ongoing continuance.

Other informal, short-term arrangements may be made for employees on family or medical leave to the extent practical for the employee and the organization and with the consent of the employee's health care provider, if appropriate.

All informal telecommuting arrangements are made on a case-by-case basis, focusing first on the business needs of the organization.

III. Hours of Work, Overtime and Attendance

A. Work Hours and Schedules

The School's normal work days are Monday through Friday. The School's workweek begins on Sunday at 12:00 AM and ends the following Saturday at 11:59 PM. Modesto Campus Hours:

Modesto Campus Hours:

Mon. – Thurs.		Friday	
Students K-3	7:55 – 3:10	Students K-3	7:55 – 11:40
Students 4-8	7:55 – 3:20	Students 4-8	7:55 – 11:50
Teachers	7:50 – 3:30	Teachers	7:50 – 3:30
Instructional Aides	7:50 – 3:45	Instructional Aides	7:50 – 12:15

Salida Campus Hours:

Mon. – Thurs.		Friday	
Students K-8	8:05 – 3:30	Students K-8	8:05 – 12:00
Teachers	8:00 – 3:45	Teachers	8:00 – 3:45
Instructional Aides	8:00 – 3:45	Instructional Aides	8:00 – 12:15

Homeschool Office Hours:

Mon. – Fri.				
Teachers	7:50 – 3:30			
Administrative Asst.	7:30 – 4:00			

The work schedule for full-time, non-exempt employees is normally 40 hours per week. Your supervisor will assign your specific work schedule.

B. Overtime

The School follows all federal and state laws regarding the payment of overtime wages by compensating all non-exempt employees for overtime hours worked. For purposes of overtime calculations for nonexempt employees, the School's workweek begins on Sunday and ends the following Saturday. The workday begins at midnight and ends the following day at 11:59 p.m. You will be informed when you are required to work overtime hours. All overtime hours worked must be preauthorized in writing by your immediate supervisor.

Only those hours that are actually worked are counted to determine an employee's overtime pay. Compensated holidays, for example, are not hours worked and are therefore not counted in overtime calculations.

C. Work Breaks/M Meal Periods

All employees working at least five (5) hours are provided with a thirty (30) minute meal period, to be taken approximately in the middle of the workday but by no later than the end of the 5th hour of work. An employee may waive this meal period if the day's work will be completed in no more than six (6) hours, provided the employee and GVA mutually consent to the waiver in writing.

All employees are also provided with a ten (10) minute rest period for every four (4) hours worked which should be scheduled towards the middle of the four (4) hour work period as practicable. Employees are prohibited from combining meal and rest period time.

An employee's supervisor must be aware of and approve scheduled meal and rest periods. Employees must immediately inform their supervisor if they are prevented from taking their meal and/or rest periods. Employees are expected to observe assigned working hours and the time allowed for meal and rest periods.

D. Pay Days

For all hourly non-exempt employees paydays are scheduled on the 10th and 26th day of each month. Each paycheck will include earnings for all reported work performed through the end of the payroll period.

For certificated/teaching staff exempt employees, paydays are scheduled on the 26th day of each month 11 months a year. Each paycheck reflects an amount equal to your salary, divided by 11 as GVA pays in 11 equal monthly payments from August - June.

For salary professional exempt employees, paydays are scheduled on the 26th day of each month 12 months a year. Each paycheck reflects an amount equal to your salary, divided by 12 as GVA pays in 12 equal monthly payments.

In the event that a regularly scheduled payday falls on a weekend or holiday, employees will receive their pay on the business day prior to the day(s) off.

You should promptly notify Payroll/Human Resource Department if you have a question regarding the calculations of your paycheck; any corrections will be adjusted and appear in the following payroll.

E. Payroll Withholdings

The School is required by law to withhold Federal Income Tax, State Income Tax, Social Security (FICA) and State Disability Insurance from each employee's pay as follows:

Federal Income Tax Withholding: The amount varies with the number of exemptions the employee claims and the gross pay amount.

State Income Tax Withholding: The amount varies with the number of exemptions the employee claims and the gross pay amount.

Social Security (FICA): The Federal Insurance Contribution Act requires that a certain percentage of employee earnings be deducted and forwarded to the federal government, together with an equal amount contributed by the School.

State Disability Insurance (SDI): This state fund is used to provide benefits to those out of work because of illness or disability.

State Teachers Retirement System (STRS): This credentialed employee deduction is for member teachers retirement system.

Every deduction from your paycheck is explained on your check voucher. If you do not understand the deductions, ask the Payroll/Human Resource Department to explain them to you.

You may change the number of withholding allowances you wish to claim for Federal Income Tax purposes at any time by filling out a new W-4 form and submitting it to Payroll/Human Resource Department. The School's business office maintains a supply of these forms.

All Federal, State and Social Security taxes will be automatically deducted from paychecks. The Federal Withholding Tax deduction is determined by the employee's W-4 form, which should be completed upon hire. It is the employee's responsibility to report any changes in filing status to the Payroll/Human Resource Department. It is also the employee's responsibility to fill out a new W-4 form if his/her filing status changes.

At the end of the calendar year, a "withholding statement" (W-2) will be prepared and forwarded to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld and total wages.

The School offers programs and benefits beyond those required by law. Employees who wish to participate in these programs may voluntarily authorize deductions from their paychecks.

F. Deferred Net Pay

Eleven (11) month employees who receive pay in the 11 month cycle may opt-in to deferred net pay plan. It allows employees to receive regular paychecks in August – June and one summer deferred net pay check. (The July check is not a payroll check but money that is withheld from your net pay from August – June.)

All regular deductions (such as taxes and retirement) and voluntary deductions (such as insurance premium, annuities, savings) will be taken from your eleven regular monthly paychecks. The check you receive in July will be NET. There will be no deductions taken from your July check.

Please see Human Resources if you would like to enroll in the Deferred Net Pay plan.

G. Wage Attachments and Garnishments

Under normal circumstances, the School will not assist creditors in the collection of personal debts from its employees. However, creditors may resort to certain legal procedures such as garnishments, levies or judgments that require the School, by law, to withhold part of an employee's earnings in their favor.

Employees are strongly encouraged to avoid such wage attachments and garnishments. If the School is presented a second garnishment request concerning an employee, the Principal will discuss the situation with the employee.

H. Attendance Policy

Employees are expected to adhere to regular attendance and to be punctual. Absenteeism and tardiness negatively affects the School's ability to implement its educational program and disrupts consistency in students' learning. Excessive absenteeism and tardiness will not be tolerated and will lead to disciplinary action, up to and including termination.

If an employee finds it necessary to be absent or late, you are expected to arrange it in advance with your immediate supervisor. If it is not possible to arrange your absence or tardiness in advance, you must notify your immediate supervisor no later than one (1) hour before the start of your workday (classroom-based teacher's and teacher's aides, see below). An absence or tardiness without notification to your immediate supervisor will lead to disciplinary action, up to and including termination.

If you are a teacher or a teacher's aide on the MODESTO CAMPUS, you are responsible to contact the Administrative Assistant who will arrange for a qualified substitute. If you are absent from work longer than one (1) day, you are expected to keep the Administrative Assistant sufficiently informed of your situation. Any absence or tardiness without notification to the Administrative Assistant will lead to disciplinary action, up to and including termination.

If you are a teacher or a teacher's aide on the SALIDA CAMPUS, you are responsible to call for a qualified substitute and contact the Administrative Assistant to keep her apprised of all details. If you are absent from work longer than one (1) day, you are expected to continue to call for a qualified substitute and to keep the Administrative Assistant sufficiently informed of your situation. Any absence or tardiness without notification to the Administrative Assistant will lead to disciplinary action, up to and including termination.

A Personal Time Off (PTO) request within Paychex must be completed by the employee for each absence taken.

If you fail to come to work for three (3) consecutive work days without authorization, the School will presume that you have voluntarily terminated your position with the School. All absences of three (3) or more consecutive days must be documented by a written doctor's note and may require a "fit for duty" or medical certification to return to work.

If an employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will need to request leave or be medically separated from the School.

I. Time Records

By law, GVA is obligated to keep accurate records of the time worked by non-exempt employees. Such employees shall be required to utilize the Paychex system.

Non-exempt employees must accurately clock in and out of their shifts as this is the only way the payroll department knows how many hours each employee has worked and how much each employee is owed. The time card indicates when the employee arrived and when the employee departed. All non-exempt employees must clock in and out for arrival and departure, along with all absences, including doctor or dentist appointments or tardies from work. All employees are required to keep the office advised of their departures from and returns to the school premises during the workday and verifying and attest to the truth of the information contained in their time records. Employees must provide electronic approval through the Paychex system.

Non-exempt employees are solely responsible for ensuring accurate information on their time cards and remembering to record time worked. If an employee forgets to clock-in/out, the employee must notify their time card approver immediately.

Non-exempt (hourly) employees are required to approve their time records no later than one business day following the conclusion of each pay period, i.e. for pay periods ending the 15th, approvals must be completed on the 16th or the first business day after the pay period end date. Failure to not approve your timecard will lead to disciplinary action, up to and including termination.

Non-exempt employees are prohibited from performing off-the-clock work, including but not limited to checking emails before/after work hours, performing work in the morning before clicking-in, and running School errands after clocking out.

No one may clock-in or out for another employee. Any employee who violates any aspect of this policy may be subject to disciplinary action, up to and including release from at-will employment with the School.

J. Mandatory Training and Meetings

The School will pay all employees for attendance at mandatory trainings, lectures and meetings.

All mandatory trainings, lectures and meetings will be identified as such. Mandatory trainings are required to be completed once a year by current employees or within 2 weeks of new employment. The School will not pay employees for attendance at voluntary trainings. If you are unsure about the characterization of an offered training, lecture or meeting, please contact your immediate supervisor before attending.

All non-exempt employees must accurately reflect attendance at all mandatory trainings, lectures and meetings outside of regular working hours on their time records in Paychex.

K. Reasonable Assurance

Less than 12 month employees will be notified of reasonable assurance status for the upcoming school year at least 30 days prior to the conclusion of the previous school year.

IV. Standards of Conduct

A. Personal Appearance

At Great Valley Academy, we promote responsibility and good citizenship. To that end, we believe it is important to set an example of professionalism by the way we act and dress.

Employees are required to wear a Great Valley Academy uniform during school hours as follows:

Bottoms

- Black or khaki color straight, jean/denim or cargo pants/shorts.
- Black or khaki color capris, skirts, skorts and jumpers. Length must be reasonable and appropriate.
- Bottoms must be plain material without designs or patterns. No decorative holes, rips or tears. Yoga, sweat pant, athletic (workout) styles are not allowed.
- Leggings/tights may only be worn under skirts, skorts, shorts and jumpers and must be solid white, black, grey or navy.

Tops

- Solid navy, collared polo shirt with white embroidered Great Valley Academy logo on the left side chest.
- Solid white, collared button-up dress shirt or blouse with green or navy embroidered Great Valley Academy logo on the left side chest.
- All tops must have either short or long sleeves.
- When wearing an undershirt, camisole or tank top under an approved GVA top, it must be solid white, black, grey or navy.
- Solid navy blue sweatshirts, sweaters, vests and jackets with a white embroidered Great Valley Academy logo on the left side chest are allowed to be worn inside.
- Great Valley Academy spirit sweatshirts and jackets may be worn inside.
- All non-navy and non-spirit sweatshirts, sweaters, vests and jackets may be worn outside but must be removed when inside.

Friday Spirit Days

- Every Friday staff may wear school spirit shirts that include but are not limited to jog-a-thon, athletics, Kids Care, grade level designs, performing arts, music, etc.
- Periodically each campus will announce dress-up or special spirit days. Details for these days will be outlined in campus newsletters and/or announcements.

Shoes

- Athletic shoes must be worn at all times. Maintenance staff may wear appropriate work boots for safety.
- No sandals, flip-flops, open-toed shoes, wedged tennis shoes, shoes with heels or wheels, slip-on shoes (i.e. Vans, Toms) or boots. Rain boots are permitted on rainy days only but athletic shoes must be brought to put on once inside.

Head Coverings

- Hats, beanies and other head coverings may be worn outside only. Food service staff may wear hats inside for sanitation purposes.
- Head coverings worn for religious reasons are allowed.

Appearance/Accessories/Hair

Great Valley Academy (GVA) expects all employees to exercise appropriate judgment with regard to personal appearance and grooming in order to be most effective in the performance of their workplace duties. GVA recognizes that personal appearance is an important element of self-expression and strives not to control or dictate appropriate employee appearance with regards to jewelry, piercings and/or tattoos worn as a matter of personal choice.

In keeping with this approach, GVA allows reasonable self-expression through personal appearance, unless

a) it conflicts with an employee's ability to perform his or her position effectively or within his or her specific work environment, or

b) it is regarded as offensive or harassing toward co-workers, students, volunteers, parents/guardians or others with whom GVA employees have contact.

GVA permits employees to wear jewelry or to display tattoos and piercings at the workplace within the following guidelines and factors that administration will consider to determine whether jewelry, piercings or tattoos may pose a conflict with the employee's job or work environment include:

1. Personal safety of self or others, or damage to company property.
2. Productivity or performance expectations.
3. Offensiveness to co-workers, students, volunteers, parents/guardians, or others in the workplace based on racial, sexual, religious, ethnic, or other characteristics or attributes of a sensitive or legally protected nature.
4. School-environment or societal norms.
5. Complaints.

If administration determines an employee's jewelry, piercings or tattoos may present such a conflict, the employee will be encouraged to identify appropriate options, such as removal of excess or offensive jewelry and piercings, covering of tattoos, or other reasonable means to resolve the conflict.

An environment of mutual cooperation, respect, and fair and consistent treatment for all employees is GVA's goal. Nonetheless, GVA is legally responsible for ensuring that no employees are subject to harassment or a hostile work environment. As an initial step toward resolution of any complaint or offense under this policy, administration will be responsible for explaining the policy and answering employee questions. If an agreeable solution cannot be reached at that stage, the Chief Executive Officer or designee will follow company procedures to resolve the issue.

Employees' hair and jewelry must be worn in a manner that is safe around students and equipment.

Uniform Reimbursement

- Employees scheduled to work 30 hours or more per week will be given a \$200 annual clothing allowance starting July 1st.
- Employees scheduled to work less than 30 hours per week will be given a \$150 annual clothing allowance starting July 1st.
- Substitute positions will not be provided reimbursement for uniform expenses but will be provided one navy blue polo.

The following items qualify for reimbursement:

- Approved navy polos and white dress shirts/blouses with the GVA logo.
- Approved black and khaki bottoms
- Approved navy blue sweaters, sweatshirts, vests or jackets with the GVA logo.
- Approved school-sponsored spirit wear
- Athletic shoes
- Work boots – Maintenance staff only
- Rain boots – Parking lot duty staff only
- GVA logo embroidery costs – Employees must show proof that tops and outerwear being reimbursed have been embroidered with the GVA logo (i.e., embroidery receipt)

Only approved GVA attire will be reimbursed as outlined above. If you would like to request an exception because of “job assignment specific” requirements, you must receive approval of your administrator **before** making the purchase and then reimbursements will still only be made up to the allowable annual clothing allowance.

GVA reserves the right to decline reimbursement for any items not outlined in this policy.

Purchasing Uniforms

You may purchase uniform tops directly from Great Valley Academy. Visit the online store at www.gvauniformstore.com.

In addition to Great Valley Academy, uniform apparel may be purchased from major retailers for your convenience.

Uniform top embroidery may be done at the following Great Valley Academy approved establishments:

- Margo’s Logo – 3616 Morristown Rd. Modesto – (209) 571-3413
- J & J Printing – 129 W. Yosemite Ave. Manteca – (209) 239-9567

B. Student Safety

In accordance with the School’s policies providing student safety, including those covering anti-harassment, anti-discrimination, anti-intimidation and anti-bullying, each employee is expected to assist in maintaining a student safe environment. Thus, each employee is required to take immediate steps to intervene when it is safe to do so if the employee witnesses an act of discrimination, harassment, intimidation or bullying of a student. The employee is also required to report such actions to the Campus Principal or Vice Principal as soon as practicable.

C. Professional Boundaries: Staff/Student Interaction Policy

Adopted Board Policy 2019.47- April 2019

GVA recognizes its responsibility to make and enforce all rules and regulations governing student and employee behavior to bring about the safest and most learning-conducive environment possible.

Corporal Punishment

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student. For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent excessive damage to property.

Acceptable and Unacceptable Staff/Student Behavior

This policy is intended to guide all GVA staff in conducting themselves in a manner that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between students and staff.

Although this policy gives direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders.

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing the boundaries of a student/staff relationship is deemed an abuse of power and a betrayal of public trust.

Some activities may seem innocent from a staff member's perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct, harmful, or abusive.

Staff must understand their own responsibility for ensuring that they do not violate the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Violations could subject the employee to discipline up to and including termination. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interactions must have boundaries surrounding potential activities, locations and intentions.

The following examples are not exhaustive lists:

Unacceptable Staff/Student Behaviors (Violations of this Policy)

- (a) Giving gifts to an individual student that are of a personal and intimate nature.
- (b) Any type of inappropriate physical contact with a student. This includes but is not limited to; massages, lingering touches, squeezing, stroking of hair, touches to private body areas.
- (c) Intentionally being alone with a student away from the school.
- (d) Making or participating in sexually inappropriate comments, storytelling or jokes.
- (e) Seeking emotional involvement with a student for your benefit.

- (f) Becoming involved with a student such that a reasonable person may suspect inappropriate behavior.

Acceptable and Recommended Staff/Student Behaviors

- (a) Getting parents' written consent for any off school property or after-school activities.
- (b) Emails, text, phone and instant messages to students must be very professional and pertaining to school activities or classes.
- (c) Keeping the door open when alone with a student.
- (d) Keeping reasonable space between you and your students.
- (e) Stopping and correcting students if they cross your own personal boundaries.
- (f) Keeping parents informed when a significant issue develops about a student.
- (g) Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries.
- (h) Involving your supervisor if conflict arises with the student or has the potential to become severe.
- (i) Making detailed notes about an incident that could evolve into a more serious situation later.
- (j) Recognizing the responsibility to stop unacceptable behavior of students or coworkers.
- (k) Recommend asking another staff member to be present if you will be alone with a student.
- (l) Pats on the back, high fives and handshakes are acceptable.
- (m) Hugs of an appropriate nature, often student initiated, that are quick, non-sexual, and side to side when possible. For the purpose of this policy, the term "hug" is defined as a quick and appropriate embrace between a staff member and student as form of admiration, respect and/or care. GVA's philosophy of Safe, Loved and Learning allows for safe interactions such as hugs in order to support students overall well-being and foster authentic adult interactions. Hugs should in no way be excessive, aggressive, lasting for a prolonged period of time.
- (n) Keeping your professional conduct a high priority.

This policy does not prevent: 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; 3) engaging in a rescue or application of Cardio Pulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Excessive force is prohibited.

Boundaries Reporting

When any staff member, parent, or student becomes aware of a staff member (or volunteer, guest, vendor) having violated the boundaries specified in this policy, or has a strong suspicion of misconduct, he or she must report the suspicion to an Administrator promptly. Reasonable suspicion means something perceived in spite of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the school as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse. The Administrator will notify the Chief Executive Officer or designee promptly upon investigation.

Child Abuse / Sexual Abuse Reporting (Mandatory Reporting)

If, within your professional capacity or within the scope of your employment, you observe or obtain possession of knowledge that a child has been a victim of child abuse or sexual abuse, or you reasonably suspect it, California Penal Code Section 11166 requires you to immediately report this information or suspicion directly to a child

protective agency or the police. The report shall be made by phone immediately and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse. Please refer to GVA policy resolution 2019.046 for detailed reporting requirements.

Investigating

The Administrator will promptly investigate, document and report to the Chief Executive Officer or designee the investigation of any allegation of sexual misconduct or inappropriate behavior, using such support staff or outside assistance, as he or she deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating Administrator, and all others privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as reasonably as possible. The Chief Executive Officer or designee shall promptly notify the Governing Board in closed session of the existence and status of any investigations. Upon completion of any such investigations, the Chief Executive Officer or designee shall report to the Governing Board any conclusions reached. The Chief Executive Officer or designee shall consult with legal counsel, as appropriate, prior to, during, and after conducting any investigation.

Consequences

Staff members who violate this policy will be subject to disciplinary action up to and including termination, and where appropriate, will be reported to authorities for potential legal action.

D. Confidential Information and Intellectual Property

Employees of the School may come into contact with confidential information, including but not limited to information about the School's staff, students, parents, suppliers, and finances. Employees are required to keep any such matters that may be disclosed to them or learned by them confidential. All information relating to students, including schools attended, addresses, contact numbers and progress information is confidential in nature, and may not be shared with or distributed to unauthorized parties. All records concerning special education pupils shall be kept strictly confidential and maintained in separate files.

Furthermore, any such confidential information, obtained through employment with the School, must not be used by an employee for personal gain or to further an outside enterprise.

Any intellectual property, such as trademarks, copyrights and patents, and any work created by an employee in the course of employment at the School shall be the property of the School and the employee is deemed to have waived all rights in favor of the School. Work, for the purpose of this policy refers to written, creative or media work. All source material used in presentation or written documents must be acknowledged.

E. Conflict of Interest

All employees must avoid situations involving actual or potential conflict of interest. An employee involved in any relationships or situation that he or she believes may constitute a conflict of interest, should immediately and fully disclose the relevant circumstances to his or her **immediate supervisor**, or any other appropriate supervisor, for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, the School may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts related to a potential or actual conflict of interest shall constitute grounds for disciplinary action.

F. Outside Employment

Employees should not accept any employment or consulting relationship with another person or entity while employed by the School that would interfere with their ability to satisfactorily perform their job duties. The School will hold all employees to the same standards of performance and scheduling demands and will not make any exceptions for employees who also hold outside jobs.

G. Expense Reimbursements

In order to be eligible for reimbursement, employees must use the appropriate expenditure reimbursement form, a copy of which may be obtained from the Staff Intranet. In general, all expenses must be budgeted and been previously approved in writing by your immediate supervisor. All reimbursement forms must be complete, signed and submitted to Accounting Department. Receipts must be provided in detailed, original format. Receipts that are not detailed or in original format will require the authorization of the COO or CEO before reimbursement can be made and are at their sole discretion for approval.

V. Employee Benefits

A. Sick Leave, Personal Time Off (PTO), and Calendar Reduction Days

The School provides Sick Leave to all Temporary or On Call employees whom are eligible based on the guidelines pursuant to California's Paid Sick Leave Law (AB 1522).

The School provides Personal Time Off (PTO) benefits to eligible employees to enable them to take paid time off for rest, illness, and recreation. The School believes that this time is valuable for employees in order to enhance their productivity and to make their work experience with the School personally satisfying.

Regular Part-time and, Full-time employees accrue PTO benefits on a pro rata basis. Temporary or On Call Employees do not accrue PTO benefits.

PTO accruals may not exceed twice an employee's current annual entitlement. Once this maximum is reached, all further accruals will cease until such time as PTO accrual falls below the maximum accrual. PTO accruals will recommence after the employee has taken PTO and his or her accrued hours have dropped below the maximum.

No employee will receive pay in lieu of vacation, except as required by law. Employees may not borrow against unearned PTO time.

No PTO accrues during any unpaid leave of absence or while on disability salary continuation. PTO accruals recommence when the employee returns to work.

Upon termination of employment, the employee is paid all accrued, unused PTO at the employee's base rate of pay at the time of his or her termination.

All PTO (when used for recreation) and Calendar Reduction Day usage must be approved in advance by your immediate supervisor.

Sick Leave, PTO, and Calendar Reduction Day accrual schedules are assigned based on the job specific categories defined in the following table.

Classification	Job definitions
Temporary or On Call Staff	Credentialed Substitutes, Classified On Call and Temporary Staff
Instructional Staff	Credentialed and Non Credentialed Teachers
Instructional Support Staff	Instructional Aides, GVS Aides, all other hourly positions that follow the academic calendar.
Administrators	Principal, Sr. Vice Principals, Vice Principals
Kids Care Classified	Kids Care Staff, Kids Care Director
Year Round Classified	Office, Administrative Support, Maintenance and Multi-Campus Staff

All **Temporary or On Call Staff** accrue Sick Leave based on the following schedule:

Temporary or On Call Staff	
30 days after date of hire	24 hours annually available first day following 30-days of employment.

Temporary or On Call Staff are responsible to report usage of Sick Leave through the Paychex system.

Sick Leave balances do not rollover into new school years.

All **Instructional Staff** (excluding Temporary or On Call) accrue PTO based on the following schedule:

Instructional Staff PTO Schedule	
Date of hire to end of School Year	80 hours annually available first day of employment. Prorated if less than 1 FTE status and/or if first date of employment is after September 1 st .

Teachers are responsible to report usage of PTO within the Paychex system. PTO may be used in increments no less than **1 hour**.

Credentialed and Non Credentialed Teachers will be paid for unused amounts in the last pay period of the school year. Teacher PTO balances do not rollover into new school years.

Teachers who take time off above the 80 hour PTO limit will be docked at their Annual Daily Pay Rate in the pay period that the absence occurs.

GVA will provide a substitute for full or half days only.

All **Administrators** (excluding Temporary or On Call) accrue PTO based on the following schedule:

Administrator PTO Schedule	
Date of hire to end of School Year	40 hours annually available first day of employment. Prorated if less than 1 FTE status and/or if first date of employment is after August 1 st .

Administrators are responsible to report usage of PTO within the Paychex system. PTO may be used in increments no less than 1 hour.

Administrator PTO balances do not rollover into new school years and are not compensated for any unused portion.

Administrators who take time off above the 40 hour PTO limit will be docked at their Annual Daily Pay Rate in the pay period that the absence occurs.

All **Instructional Support Staff** (excluding Temporary or On Call) accrue PTO based on the following schedule.

Instructional Support Staff PTO Accrual Schedule	
Date of hire and thereafter	Up to 80 hours annually accrued at .03846 per hour worked

PTO requests are required to be submitted through the Paychex system.

Instructional aides and GVS Aides and all other hourly positions that follow the academic calendar, have the option to request PTO hours available to be paid in months that include school breaks (i.e. spring, fall, winter and summer breaks). These requests shall be submitted through the Paychex system. Request must indicate month in which to include the hours.

All **Kids Care Classified Staff** (excluding Temporary or On Call) accrue PTO based on the following schedule:

Kids Care Classified PTO Accrual Schedule	
<u>Years of Continuous Service</u>	<u>PTO Accrual</u>
Date of hire through fifth year	Up to 80 hours annually, accrued at 6.67 hours per month for Salary Employees and at .03846 per hour worked for Hourly Employees.
Sixth year through Tenth year	Up to 120 hours annually, accrued at 10 hours per month for Salary Employees and at .057692 per hour worked for Hourly Employees.
Eleventh year and thereafter	Up to 160 hours annually, accrued at 13.33 hours per month for Salary Employees and at .07692 per hour worked for Hourly Employees.

PTO requests are required to be submitted through the Paychex system.

All **Year Round Classified Staff** accrue PTO and Calendar Reduction Days based on the following schedule:

Year Round Classified PTO Accrual Schedule	
Date of hire and thereafter	Up to 80 hours annually, accrued at 6.67 hours per month for Salary Employees and at .03846 per hour worked for Hourly Employees.
Year Round Calendar Reduction Accrual Schedule	
<u>Years of Continuous Service</u>	<u>Calendar Reduction Days</u>
Date of hire through two years of service	5 days of reduction in annual work days available first day of employment. Prorated if less than 1 FTE and/or if first date of employment is after August 1 st .
Three years through five years of service	10 days of reduction in annual work days prorated at completion of 2 nd year of service. Prorated if less than 1 FTE.
Six years and thereafter	15 days of reduction in annual work days prorated at completion of 5 th year of service. Prorated if less than 1 FTE.

Reduction Days are to be taken during school breaks, and should not result in office closure. Adequate department coverage is required. Unless otherwise approved by the **Chief Executive Officer or Chief Operating Officer**. Reduction requests are required to be submitted through the Paychex system. Reduction Days do not rollover to new school year. All Reduction day requests must be approved in advance by your immediate supervisor.

PTO and Calendar Reduction Day requests are required to be submitted through the Paychex system.

B. Insurance and Retirement Benefits

1. Health Insurance

All Great Valley Academy (GVA) employees who consistently work 30 hours or more per week are eligible for health insurance benefits in accordance with the school's health insurance plan as set forth in the Summary Plan Description ("SPD"). Temporary/On-Call employees or Part-time employees who have been assigned additional hours on a temporary basis are not eligible for benefits. There are various plans available and each plan has its own premium component. The employee's portion of monthly premiums will be deducted from the employee's paycheck. As mandated by federal and state law, employees on a leave of absence retain existing health coverage and are responsible for paying their portion of premiums for such coverage. Failure to make a timely request and pay for such coverage will result in the loss of coverage.

GVA recognizes that employees who reach the age of 65 may choose to enroll in the Federal Medicare insurance program thus not enrolling or dis-enrolling in the GVA sponsored medical plan. In addition to the Federal Medicare insurance program, an employee 65 years of age or older may opt to enroll in a supplemental medical plan (i.e., Kaiser, Blue Shield, Aetna, etc.). Supplemental plans to Medicare may be more cost effective for the employee than the school sponsored plans. This policy does not require that a 65 or older employee enroll in Medicare or a supplemental plan.

When an employee chooses to enroll in Medicare with a supplemental plan, GVA will proceed as follows:

1. GVA will reimburse to the employee the total monthly cost of the premium for a supplemental plan (up to \$250 per month) that is from the same medical carrier that is currently offered to all other eligible employees (i.e., Kaiser).
2. GVA will not reimburse the Medicare premiums, co-pays, or other out-of-pocket medical expenses.
3. Employee must provide proof of enrollment and statement for the monthly premium upon enrollment in the supplemental plan and each August thereafter to coincide with GVA's general open enrollment period.
4. Reimbursement for medical premium will be processed on the employee payroll check and may be considered taxable income.
5. Employee must notify GVA immediately upon cancellation of plan or change in medical plan.
6. If an employee leaves GVA, the employee is responsible to reimburse GVA for any premium paid in advance.

This policy does not guarantee that Great Valley Academy will remain with any one medical benefit carrier, continue to sponsor medical benefits for employees, or provide continuous reimbursement for supplemental plans. All supplemental plan reimbursements will be reviewed by the Chief Executive Officer or designee for approval.

2. Disability Insurance

All employees are enrolled in California State Disability Insurance (SDI), which is a partial wage replacement insurance plan for California workers. Employees may be eligible for SDI when they are ill or have non-work related injuries, or may be eligible for work related injuries if they are receiving workers' compensation at a weekly rate less than the SDI rate. Specific rules and regulations relating to SDI eligibility are available from the Payroll/Human Resource Department.

3. Family Leave Insurance

Employees covered by the California Disability Insurance program are also covered by the California Paid Family Leave Insurance program. Eligible employees are entitled to receive up to six weeks of wage replacement benefits when they suffer a wage loss for taking time off to care for a seriously ill child, spouse, parent or domestic partner or to bond with a new child within one year of birth or placement of the child in connection with foster care or adoption. Specific rules and regulations relating to the Family Leave Insurance are available from the California's Employment Development Department.

4. Workers' Compensation Insurance

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

5. Retirement Plan

All eligible classified employees may participate in an employer sponsored 401K plan. Eligible employees may participate in elective deferral contributions and receive plan stated matching contributions after the age of 21 and upon completing one year of eligible employment (at least 1,000 hours across 12 consecutive months of employment) with the School. Plan entry dates are January 1st and July 1st of each calendar year following the

work anniversary date, i.e. an employee who completed one year of eligible employment in September may enroll in the 401k plan effective January 1st.

6. COBRA Benefits

When coverage under the School's medical and/or dental plans (as applicable) ends, employees or their dependents can continue coverage for eighteen (18) or thirty-six (36) months, depending upon the reason benefits ended. To continue coverage, an employee must pay the full cost of coverage – the employee contribution and the School's previous contribution plus a possible administrative charge.

Medical coverage for an employee, his/her spouse, and eligible dependent children can continue for up to eighteen (18) months if coverage ends because:

- Employment ends, voluntarily or involuntarily, for any reason other than gross misconduct; or
- Hours of employment are reduced below the amount required to be considered a full-time employee or part-time, making an employee ineligible for the plan.

This eighteen (18) month period may be extended an additional eleven (11) months in cases of disability subject to certain requirements. This eighteen (18) month period may also be extended an additional eighteen (18) months if other events (such as a divorce or death) occur subject to certain requirements.

An employee's spouse and eligible dependents can continue their health coverage for up to thirty-six (36) months if coverage ends because:

- The employee dies while covered by the plan;
- The employee and his/her spouse become divorced or legally separated;
- The employee becomes eligible for Medicare coverage, but his/her spouse has not yet reach age sixty-five (65); or
- The employee's dependent child reaches an age which makes him or her ineligible for coverage under the plan.

Rights similar to those described above may apply to retirees, spouses and dependents if the employer commences a bankruptcy proceeding and those individuals lose coverage.

GVA will notify employees or their dependents if coverage ends due to termination or a reduction in work hours. If an employee becomes eligible for Medicare, divorced or legally separated, die, or when a dependent child no longer meets the eligibility requirements, the employee or a family member are responsible for notifying the School within thirty (30) days of the event. GVA will then notify the employee or his/her dependents of the employee's rights.

Health coverage continuation must be elected within sixty (60) days after receiving notice of the end of coverage, or within sixty (60) days after the event causing the loss, whichever is later.

There are certain circumstances under which coverage will end automatically. This happens if:

- Premiums for continued coverage are not paid within thirty (30) days of the due date;
- The employee (or his/her spouse or child) become covered under another group health plan which does not contain any exclusion or limitation with respect to any pre-existing condition the employee (or the employee's spouse or child, as applicable) may have;

- GVA stops providing group health benefits;
- The employee (or the employee's spouse or child) become entitled to Medicare; or
- The employee extended coverage for up to twenty-nine (29) months due to disability and there has been a final determination that the employee is no longer disabled.

C. Leaves of Absence

Under certain circumstances, the School may grant leaves of absence to employees. Employees must submit requests for leaves of absence in writing to Payroll/Human Resource Department as far in advance as is practicable. While on leave, employees should keep in contact with Payroll/Human Resource Department and must notify Payroll/Human Resource Department as soon as possible if the employee intends to return to work earlier than planned. If an employee's leave expires and fails to return to work without contacting Payroll/Human Resource Department, it will be presumed that the employee abandoned his/her position with the School and employment may be terminated. If an employee is unable or unwilling to return to work at the expiration of his/her leave of absence, his/her employment may be terminated.

This Handbook summarizes leave that may be available to employees. Most leave policies have differing requirements for eligibility, duration, benefits, etc. Therefore, employees should contact Payroll/Human Resource Department to request specific information relating to a particular leave policy.

While out on a leave of absence, employees may not accept employment with another company or person unless agreed to in advance in writing by the School's Payroll/Human Resource Department. Acceptance of employment in violation of this policy will be considered an abandonment of the employee's position with the School, and employment may be terminated. Employees shall not apply for unemployment compensation insurance while out on leave.

1. Family Care and Medical Leave/California Family Rights Act

The School complies with the federal Family and Medical Leave Act (FMLA) and the California Family Rights Act (CFRA), both of which require the School to permit each eligible employee to take up to 12 work weeks (or twenty-six (26) workweeks where indicated) of leave in any twelve (12) month period for the purposes enumerated below.

In a single 12-month period, FMLA also provides for a family member of a person on covered active duty in the Armed Forces or Reserves to take up to 12 work weeks of leave for any qualifying emergency arising out of the fact that a spouse, son, daughter or parent is on active duty in the Armed Forces or Reserves or up to 26 work weeks, less other FMLA leave taken, to care for an injured service member during rehabilitation as described below.

For ease of reference in this policy, all leave taken under both FMLA and CFRA will be referred to as "FMLA leave," except to the extent that leave under FMLA and CFRA do not overlap. It is also the policy of the School that it will not interfere with, restrain or deny any employee's rights provided by FMLA and CFRA. FMLA leave runs concurrently with Pregnancy Disability Leave, while CFRA leave does not.

Eligible Employees

Employees may be eligible for FMLA leave if they have:

- Been employed by the School for at least 12 months; and

- Worked at least 1,250 hours during the 12-month period immediately preceding commencement of the FMLA leave; and
- Work at a location in which the employer has at least 50 employees within 75 miles radius of the employee's work site (or 5+ employees for CFRA).

Reasons for Taking Leave

The 12 workweeks (or twenty-six (26) workweeks where indicated) FMLA leave allowance includes any time taken (with or without pay) for any of the following reasons:

- Care for the employee's newborn child or a child placed with the employee for adoption or foster care. Leaves for this purpose must conclude twelve (12) months after the birth, adoption, or placement. If both parents are employed by the School, they will be entitled to a combined total of twelve (12) weeks of leave for this purpose.
- For your own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by the School's separate pregnancy disability policy).
 - A "serious health condition" is an illness, injury (including, but not limited to, on-the-job injuries), impairment, or physical or mental condition of the employee or a child, parent, or spouse of the employee that involves either inpatient care or continuing treatment, including, but not limited to, treatment for substance abuse.
 - "Inpatient care" means a stay in a hospital, hospice, or residential health care facility, any subsequent treatment in connection with such inpatient care, or any period of incapacity. A person is considered an "inpatient" when a health care facility formally admits him/her to the facility with the expectation that he/she will remain at least overnight and occupy a bed, even if it later develops that such person can be discharged or transferred to another facility and does not actually remain overnight.
 - "Incapacity" means the inability to work, attend school, or perform other regular daily activities due to a serious health condition, its treatment, or the recovery that it requires.
 - "Continuing treatment" means ongoing medical treatment or supervision by a health care provider.
- Care for a spouse, domestic partner, child or parent with a serious health condition or military service related injury (and grandparent, grandchild or sibling for CFRA). When an employee is providing care to a spouse, son, daughter, parent, or next of kin who is a covered Armed Forces service member with a serious injury or illness, the employee may take a maximum of twenty-six (26) weeks of FMLA leave in a single twelve (12) month period to provide said care.
- For a qualifying exigency arising out of the fact that your spouse, son, daughter or parent is on covered active duty status (or has been notified of an impending call or order to covered active duty) in the Regular Armed Forces or Reserves deployed, or for deployment, to a foreign country.

A "serious injury or illness" for a covered veteran means an injury or illness that was incurred or aggravated by the member in the line of duty on active duty in the Armed Forces and manifested itself before or after the member

became a veteran, and is: 1) a continuation of a serious injury or illness that was incurred or aggravated when the covered veteran was a member of the Armed Forces and rendered the service member unable to perform the duties of the service member's office, grade, rank or rating; or 2) a physical or mental condition for which the covered veteran has received a VA Service Related Disability Rating (VASRD) of 50 percent or greater and such VASRD rating is based, in whole or in part, on the condition precipitating the need for caregiver leave; or 3) a physical or mental condition that substantially impairs the veteran's ability to secure or follow a substantially gainful occupation by reason of a disability or disabilities related to military service or would do so absent treatment; or 4) an injury, including a psychological injury, on the basis of which the covered veteran has been enrolled in the Department of Veterans Affairs Program of Comprehensive Assistance for Family Caregivers.

A "qualifying exigency" is one or more of the following, as further defined in regulation: 1) short notice deployment; 2) military events and related activities; 3) childcare and school activities; 4) financial and legal arrangements; 5) counseling; 6) rest and recuperation; 7) post-deployment activities; 8) parental care; 9) additional activities. The maximum amount of time an eligible employee may take for rest and recuperation qualifying exigency leave is a maximum of 15 calendar days.

An employee that takes leave may elect, or the School may require the employee, to substitute any of the employee's accrued PTO during this period or any other paid or unpaid time off negotiated with the School. If an employee takes leave because of the employee's own serious health condition, the employee may elect, or the School may require the employee, to substitute accrued PTO during the period of the leave.

Length of FMLA Leave

FMLA leave can be taken in one (1) or more periods, but may not exceed twelve (12) workweeks total for any purpose in any twelve (12) month period, as described below, for any one, or combination of the above-described situations. "Twelve workweeks" means the equivalent of twelve (12) of the employee's normally scheduled workweeks. For a full-time employee who works five (5) eight-hour days per week, "twelve workweeks" means sixty (60) working and/or paid eight (8) hour days.

In addition to the twelve (12) workweeks of FMLA leave that may be taken, an employee who is the spouse, son, daughter, parent, or next of kin of a covered Armed Forces service member shall also be entitled to a total of twenty-six (26) workweeks of FMLA leave during a twelve (12) month period to care for the service member.

The "twelve month period" in which twelve (12) weeks of FMLA leave may be taken is the twelve (12) month period immediately preceding the commencement of any FMLA leave.

If a holiday falls within a week taken as FMLA leave, the week is nevertheless counted as a week of FMLA leave. If, however, the School's business activity has temporarily ceased for some reason and employees are generally not expected to report for work for one or more weeks, such as the Winter Break, Spring Break, or Summer Vacation, the days the School's activities have ceased do not count against the employee's FMLA leave entitlement. Similarly, if an employee uses FMLA leave in increments of less than one (1) week, the fact that a holiday may occur within a week in which an employee partially takes leave does not count against the employee's leave entitlement unless the employee was otherwise scheduled and expected to work during the holiday.

Pay during FMLA Leave

- An employee on FMLA leave because of his/her own serious health condition must use all accrued paid sick leave at the beginning of any otherwise unpaid FMLA leave period. If an employee is receiving a

partial wage replacement benefit during the FMLA leave, the School and the employee may agree to have School-provided paid leave, such as vacation, PTO, or sick time, supplement the partial wage replacement benefit unless otherwise prohibited by law.

- An employee on FMLA leave for child care or to care for a spouse, domestic partner, parent, or child with a serious health condition may use any or all accrued sick leave at the beginning of any otherwise unpaid FMLA leave.
- If an employee has exhausted his/her sick leave, leave taken under FMLA shall be unpaid leave.
- The receipt of sick leave pay or State Disability Insurance benefits will not extend the length of the FMLA leave. Sick pay accrues during any period of unpaid FMLA leave only until the end of the month in which unpaid leave began.

Health Benefits

Payment of premiums while on FMLA leave remains the same as if the employee were not on leave. Thus, the employee is required to pay any premium payments for him/herself and dependents during leave that would have been made if he/she were not on leave, while the School continues to pay the benefits at the same level as if the employee were not on leave. When a request for FMLA leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

If the employee out on leave chooses not to return to work from a leave allowed by this policy after the expiry of the leave, the employee will be required to repay the School the premium amounts it paid during leave, unless the employee does not return to work because of circumstances beyond his/her control or because of recurrence, continuation or onset of a serious health condition. An employee is deemed to have “failed to return from leave” if he/she works less than thirty (30) days after returning from FMLA leave.

Medical Certifications

An employee requesting FMLA leave because of his/her own or a relative’s serious health condition must provide medical certification from the appropriate health care provider on a form supplied by the School. Absent exigent circumstances, failure to provide the required certification in a timely manner (within 15 days of the School’s request for certification) may result in denial of the leave request until such certification is provided.

The School will notify the employee in writing if the certification is incomplete or insufficient, and will advise the employee what additional information is necessary in order to make the certification complete and sufficient. The School may contact the employee’s health care provider to authenticate a certification as needed.

If the School has reason to doubt the medical certification supporting a leave because of the employee’s own serious health condition, the School may request a second opinion by a health care provider of its choice (paid for by the School). If the second opinion differs from the first one, the School will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.

Recertifications are required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit recertifications can result in termination of the leave.

Certification for Qualifying Exigency

The first time an employee requests leave because of a qualifying exigency arising out of the covered active duty or call to covered active duty status (or notification of an impending call or order to covered active duty) of a covered service member, an employer may require the employee to provide a copy of the military member's active duty orders or other documentation issued by the military which indicates that the military member is on covered active duty or call to covered active duty service. This information need only be provided to the employer once.

The School may require that leave for any qualifying exigency be supported by a certification from the employee that sets forth the following information: 1) a statement or description, signed by the employee, of appropriate facts regarding the qualifying exigency for which FMLA leave is requested; 2) the approximate date on which the qualifying exigency commenced or will commence; 3) if the request is for a single, continuous period of time, the beginning and end dates for such absence; 4) if the request is for an intermittent or reduced schedule basis, an estimate of the frequency and duration of the qualifying exigency; 5) if the request involves meeting with a third party, appropriate contact information for the individual or entity with whom the employee is meeting (such as name, title, organization, address, telephone number, fax number and email address) and a brief description of the purpose of the meeting; and 6) if the request involves rest and recuperation leave, a copy of the military member's rest and recuperation orders, or other documentation issued by the military which indicates that the military member has been granted rest and recuperation leave, and the dates of the military member's rest and recuperation leave. The School may provide the employee with a form that will meet these certification requirements.

Procedures for Requesting and Scheduling FMLA Leave

An employee should request FMLA leave by completing a Request for Leave form (available from Payroll/Human Resource Department) and submitting it to Payroll/Human Resource Department. An employee asking for a Request for Leave form will receive a copy of the School's then-current FMLA leave policy.

Employees should provide not less than thirty (30) days notice for foreseeable childbirth, placement or any planned medical treatment for the employee or his/her spouse, child or parent. Failure to provide such notice is grounds for denial of a leave request, except in situations where the need for FMLA leave is an emergency or otherwise unforeseeable.

Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.

If FMLA leave is taken because of the employee's own serious health condition or the serious health condition of the employee's spouse, domestic partner, parent or child, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition.

If FMLA leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two (2) weeks, except that the School will grant a request for FMLA leave for this purpose of at least one day but less than two (2) weeks' duration on any two (2) occasions.

If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he/she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position. The School will respond to a FMLA leave request no later than five (5) business days of receiving the request. If an FMLA leave request is granted, the School will notify the employee in writing that the leave will be counted against the employee's FMLA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

Return to Work

Upon timely return at the expiration of the FMLA leave period, an employee (other than a "key" employee whose reinstatement would cause serious and grievous injury to School operations) is entitled to the same or comparable position that is virtually identical to the employee's original position in terms of pay, benefits and working conditions, including privileges, perquisites and status, unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA leave.

When a request for FMLA leave is granted to an employee (other than a "key" employee), the School will give the employee a written guarantee of reinstatement at the termination of the leave (with the limitations explained above).

Before an employee will be permitted to return from FMLA leave taken because of his/her own serious health condition, the employee must obtain a certification from his/her health care provider that he/she is able to resume work.

If an employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

Limitations on Reinstatement

GVA may refuse to reinstate a "key" employee if the refusal is necessary to prevent substantial and grievous injury to the School's operations. A "key" employee is an exempt salaried employee who is among the highest paid 10% of the School's employees within seventy-five (75) miles of the employee's worksite.

A "key" employee will be advised in writing at the time of a request for, or if earlier, at the time of commencement of, FMLA leave, that he/she qualifies as a "key" employee and the potential consequences with respect to reinstatement and maintenance of health benefits if the School determines that substantial and grievous injury to the School's operations will result if the employee is reinstated from FMLA leave. At the time it determines that refusal is necessary, the School will notify the "key" employee in writing (by certified mail) of its intent to refuse reinstatement and will explain the basis for finding that the employee's reinstatement would cause the School to suffer substantial and grievous injury. If the School realizes after the leave has commenced that refusal of reinstatement is necessary, it will give the employee at least ten (10) days to return to work following the notice of its intent to refuse reinstatement.

Employment during Leave

No employee, including employees on FMLA leave, may accept employment with any other employer without the School's written permission. An employee who accepts such employment without the School's written permission will be deemed to have resigned from employment at the School.

Pregnancy Disability Leave

This policy explains how the School complies with the California Pregnancy Disability Act, which requires the School to give each female employee an unpaid leave of absence of up to four (4) months per pregnancy, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

- Employee Eligibility Criteria

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

- Events That May Entitle an Employee to Pregnancy Disability Leave

The four (4)-month pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

- a. The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk to herself, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
- b. The employee needs to take time off for prenatal care.

Duration of Pregnancy Disability Leave

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "Four months" means the number of days the employee would normally work within four months. For a full-time employee who works five (5) eight (8) hour days per week, four (4) months means 693 hours of leave (40 hours per week times 17 $\frac{1}{3}$ weeks).

For employees who work more or less than forty (40) hours per week, or who work on variable work schedules, the number of working days that constitutes four (4) months is calculated on a pro rata or proportional basis. For example, for an employee who works twenty (20) hours per week, "four months" means 346.5 hours of leave entitlement (20 hours per week times 17 $\frac{1}{3}$ weeks). For an employee who normally works forty-eight (48) hours per week, "four months" means 832 hours of leave entitlement (48 hours per week times 17 $\frac{1}{3}$ weeks).

At the end or depletion of an employee's pregnancy disability leave, an employee who has a physical or mental disability (which may or may not be due to pregnancy, childbirth, or related medical conditions) may be entitled to reasonable accommodation. Entitlement to additional leave must be determined on a case-by case basis, taking into account a number of considerations such as whether an extended leave is likely to be effective in allowing the employee to return to work at the end of the leave, with or without

further reasonable accommodation, and whether or not additional leave would create an undue hardship for the School. The School is not required to provide an indefinite leave of absence as a reasonable accommodation.

Pay during Pregnancy Disability Leave

- An employee on pregnancy disability leave must use all accrued paid sick leave and may use any or all accrued vacation or PTO time at the beginning of any otherwise unpaid leave period.
- The receipt of vacation pay, PTO, or sick leave pay, or state disability insurance benefits, will not extend the length of pregnancy disability leave.
- Vacation, PTO, and sick pay accrues during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began.

Health Benefits

GVA shall provide continued health insurance coverage while an employee is on pregnancy disability leave consistent with applicable law. The continuation of health benefits is for a maximum of four (4) months in a twelve (12)-month period. GVA can recover premiums that it already paid on behalf of an employee if both of the following conditions are met:

- a. The employee fails to return from leave after the designated leave period expires.
- b. The employee's failure to return from leave is for a reason other than the following:
 - The employee is taking leave under the California Family Rights Act.
 - There is a continuation, recurrence or onset of a health condition that entitles the employee to pregnancy disability leave.
 - There is a non-pregnancy related medical condition requiring further leave.
 - Any other circumstance beyond the control of the employee.

Seniority

An employee on pregnancy disability leave remains an employee of the School and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, she will return with the same seniority she had when the leave commenced.

Medical Certifications

- a. An employee requesting a pregnancy disability leave must provide medical certification from her healthcare provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.
- b. Recertifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required recertifications can result in termination of the leave.

Requesting and Scheduling Pregnancy Disability Leave

- An employee should request pregnancy disability leave by completing a Request for Leave form and submitting it to the Principal. An employee asking for a Request for Leave form will be referred to the School's then current pregnancy disability leave policy.
- Employee should provide not less than thirty (30) days' notice or as soon as is practicable, if the need for the leave is foreseeable. Failure to provide such notice is grounds for denial of the leave request, except if the need for pregnancy disability leave was an emergency and was otherwise unforeseeable.
- Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.
- Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.
- If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.
- The School will respond to a pregnancy disability leave request within ten (10) days of receiving the request. If a pregnancy disability leave request is granted, the School will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

Return to Work

- a. Upon timely return at the expiration of the pregnancy disability leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position at the time reinstatement is requested. If the employee is not reinstated to the same position, she must be reinstated to a comparable position unless one of the following is applicable:
 - i. The employer would not have offered a comparable position to the employee if she would have been continuously at work during the pregnancy disability leave.
 - ii. There is no comparable position available, to which the employee is either qualified or entitled, on the employee's scheduled date of reinstatement or within sixty (60) calendar days thereafter. The School will take reasonable steps to provide notice to the employee if and when comparable positions become available during the sixty (60) day period.

A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.
- b. When a request for pregnancy disability leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).
- c. In accordance with GVA policy, before an employee will be permitted to return from a pregnancy disability leave of three (3) days or more, the employee must obtain a certification from her healthcare provider that she is able to resume work.

- d. If the employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

Employment during Leave

No employee, including employees on pregnancy disability leave, may accept employment with any other employer without the School's written permission. An employee who accepts such employment without written permission will be deemed to have resigned from employment.

2. Medical or Personal Leave of Absence

At the discretion of Payroll/Human Resource Department, an unpaid medical leave of absence or personal leave of absence (where the employee opted out of FMLA/CFRA protection) may be granted to employees who are not eligible for other leaves. Ask Payroll/Human Resource Department for information on medical or personal leaves of absence, and any implications unpaid medical or personal leave may have on your eligibility for employee benefits, including medical benefit plan coverage. Leave time will be for a set period of time. Employees on unpaid leave are made no guarantee to return to their exact position when their leave has concluded.

3. Catastrophic Injury or Illness Leave Policy

The purpose of this policy is to permit an employee of Great Valley Academy ("GVA") to contribute a portion of his or her accrued paid time off (PTO) to other employees (via a pooling ("bank") of donated PTO) when another employee has suffered a catastrophic illness or injury requiring absence from work for a prolonged period of time.

"Catastrophic injury or illness" is defined as a life-threatening injury or illness of an employee or the employee's minor child which totally incapacitates the employee from work, as verified by a licensed physician, and forces the employee to exhaust all leave time earned by that employee, resulting in the loss of compensation for the employee. Acute chronic illnesses or injuries, such as cancer or major surgery, which result in intermittent absences from work and which are long-term in nature and require long recuperation periods, may be considered catastrophic. Conditions that are short-term in nature, including but not limited to common illnesses (influenza, measles, etc.) and common injuries (back pain, broken limb, sprained ankle, etc.) are generally not catastrophic.

An employee who requests catastrophic leave donations must personally (or the employee's minor child must) be suffering from a catastrophic illness or injury that has resulted in, or is anticipated to result in, the exhaustion of all of his/her accrued paid leave, including but not limited to paid time off and vacation time. Employees are not eligible to receive leave donations in order to care for others with the exception of the employee's minor child.

Participation in this program is voluntary. Recipient employees shall not offer anything of value to another employee in exchange for donating leave. Likewise, donating employees shall not receive anything of value from another employee in exchange for donating leave.

Recipient Eligibility

An employee is only eligible to receive leave donations under this policy if he/she is a regular, full-time employee (30 or more hours per week) who has been in an active work status for GVA for at least 18 months (1.5

consecutive years. Legally protected leaves of absence pursuant to the Family Medical Leave Act (“FMLA”), Americans with Disabilities Act (“ADA”), Fair Employment and Housing Act (“FEHA”), Pregnancy Disability Leave (“PDL”), California Family Rights Act (“CFRA”), or similar federal, state, or local law shall not be considered a break in service for the purposes of determining whether the employee has been in an active work status for the requisite amount of time.

No employee may request to receive catastrophic leave more than one (1) time within a thirty-six (36) month period.

Donor Eligibility

An employee is only eligible to donate leave under this policy if he/she is a regular, full-time employee (30 or more hours per week) who has been in an active work status for GVA for at least 18 months (1.5) consecutive years. Legally protected leaves of absence pursuant to the Family Medical Leave Act (“FMLA”), Americans with Disabilities Act (“ADA”), Fair Employment and Housing Act (“FEHA”), Pregnancy Disability Leave (“PDL”), California Family Rights Act (“CFRA”), or similar federal, state, or local law shall not be considered a break in service for the purposes of determining whether the employee has been in an active work status for the requisite amount of time.

Donating employees may contribute five (5) paid time off days per fiscal year to a paid time off bank for employees suffering a catastrophic illness or injury; however, each donating employee must retain at least five (5) paid time off days for his/her own account. Only accrued, unused paid time off may be donated.

Process of Requesting Catastrophic Leave

1. Catastrophic leave requests must be submitted in writing to GVA and include a medical certification of the catastrophic injury or illness.
2. Upon receiving the catastrophic leave request, the Chief Executive Officer (“CEO”) or designee shall determine:
 - That the employee is unable to work due to the employee’s or employee’s minor child’s catastrophic illness or injury; and
 - That the employee has exhausted all accrued paid leave credits.
3. When the above verification and determinations are made, the CEO or designee may approve the transfer of paid time off credits. There is no right to receive catastrophic leave. The CEO or designee may in his/her unreviewable discretion decline an employee’s request for catastrophic leave benefits for any reason.
4. If the recipient employee’s request is granted, the CEO or designee shall inform employees of the means by which donations may be made in response to the employee’s request. Eligible employees may donate accrued paid time off credits to the requesting employee at a minimum of one (1) day, prorated per donating employee work day, and in hour increments thereafter. All transfers of eligible leave credit shall be irrevocable.

5. Donating employees shall remain anonymous. GVA will not identify the donor publically or to the recipient employee, but some employees may need to be made aware of the donation in order to process and administer the donation.
6. An employee who receives paid leave pursuant to this program shall use any leave credits that he/she continues to accrue on a monthly basis before receiving paid leave pursuant to this program. No employee shall receive more than forty (40) donated paid time off days.
7. If the employee is also receiving State Disability Insurance (“SDI”) or Paid Family Leave (“PFL”) benefits, which is paid on a weekly basis, the total amount of catastrophic leave pay the employee may receive on a weekly basis, when added to the amount of SDI or PFL benefits the employee is receiving, shall not exceed the employee’s total weekly salary.

The employee who is recipient of the donated leave credits shall use those credits in compliance with their approved application for catastrophic leave.

4. Time Off for Organ/Bone Marrow Donation Leave

Employees are given up to 30 business days paid leave of absence in any one year period for the purpose of donating an organ to another person and a 5 business day paid leave of absence in any one year period for the purpose of donating bone marrow to another person. The year period is calculated from the date the employee’s leave begins and consists of 12 consecutive months. The leave may be taken in one or more periods. These leaves will not run concurrently with CFRA or FMLA leave.

If the donating employee has any accrued, unused sick or personal days, the employee is required to use up to five of these days for bone marrow donations and up to 10 of these days for organ donations. The School will maintain and pay for health care coverage for the full duration of the leave as if the employee were still at work; the employee will be required to pay their share of premiums, as if they were still at work.

An employee shall not have any greater rights during this leave than if he or she had been actively working during this time, but will be reinstated to their same or equivalent job prior to the leave. No employee shall be discriminated or retaliated against for taking an organ or bone marrow donation leave.

The employee shall provide verification to the School that he or she is an organ or bone marrow donor and that there is a medical necessity for the leave. The employee shall notify Human Resources as far in advance of the leave as is practicable.

5. Funeral/Bereavement Leave

Employees will be allowed up to three (3) paid working days off to arrange and attend the funeral of an immediate family member. For purposes of this policy, an employee’s immediate family member includes a current spouse, parent, step parent, legal guardian, sibling, child, current grandparent-, parent-, sister-, or brother-in-law, grandparent, grandchild, or domestic partner.

If any employee requires more than three (3) days off for bereavement leave, the employee may request additional unpaid leave or may request the opportunity to use any accrued PTO time, which may be granted in the discretion of the School.

6. Military Leave of Absence

The school provides unpaid military leaves of absence to employees who serve in the uniformed services as required by the Uniformed Services Employment and Reemployment Rights Act of 1994 and applicable state laws. Leave is available for active duty, active duty for training, initial active duty for training, inactive duty training, full-time National Guard duty and for examinations to determine fitness for any such duty. Total military leave time taken may not exceed five years during employment, except in special circumstances.

Advance notice of leave is required. Please inform your immediate supervisor of anticipated military leave time as far in advance as possible. While the use of PTO time to cover the leave is not required, accrued PTO will be paid during military leave, unless otherwise requested by the employee to be unpaid. Health plan coverage continuance can be arranged for up to twenty-four (24) months during military leave if required premium payments are made by employee. As with other leaves of absence, failure to return to work or to reapply within applicable time limits may result in termination of employment. For salary exempt employees, military leave time taken as a partial week will be compensated the employee's regular salary less any pay received from the military for the partial time off requested. Documentation outlining the military pay received must be provided by the employee no later than one week upon return from service.

Upon a return from military leave up to five years, an employee is entitled to reemployment within two weeks after the employee submits his/her reemployment application.

Eligible employees may be entitled to other leave rights related to military leave. Please contact Payroll/Human Resource Department to understand all leave rights that may be available to you.

Except for employees serving in the National Guard, GVA will reinstate those employees returning from military leave to their same position or one of comparable seniority, status, and pay if they have a certificate of satisfactory completion of service and apply within ninety (90) days after release from active duty or within such extended period, if any, as required by law. For those employees serving in the National Guard, if he or she left a full-time position, the employee must apply for reemployment within forty (40) days of being released from active duty, and if he or she left part-time employment, the employee must apply for reemployment within five (5) days of being released from active duty.

An employee who was absent from work while fulfilling his or her covered service obligation under the USERRA or California law shall be credited, upon his or her return to the School, with the hours of service that would have been performed but for the period of absence from work due to or necessitated by USERRA-covered service. Exceptions to this policy will occur wherever necessary to comply with applicable laws.

GVA shall grant up to ten (10) days of unpaid leave to employees who work more than twenty (20) hours per week and who are spouses of deployed military servicemen and servicewomen. The leave may be taken when the military spouse is on leave from deployment during a time of military conflict. To be eligible for leave, an employee must provide the School with (1) notice of intention to take military spousal leave within two (2) business days of receiving official notice that the employee's military spouse will be on leave from deployment, and (2) documentation certifying that the employee's military spouse will be on leave from deployment during the time that the employee requests leave.

7. Drug and Alcohol Rehabilitation Leave

The school will reasonably accommodate an employee who voluntarily enters and participates in an alcohol or drug rehabilitation program, including potentially providing unpaid leave to participate in the program. The

School will not pay for the costs incurred in attending a rehabilitation program. An employee who wishes to identify him or herself as an individual in need of the assistance of an alcohol or drug rehabilitation program may contact Payroll/Human Resource Department. The School will take all reasonable steps necessary to maintain the employee's privacy in this situation. The employee may use PTO time, if any, during requested leave.

Nothing in this policy shall prohibit the School from refusing to hire or discharge an employee who, because of his or her current use of alcohol or drugs, is unable to perform his/her duties or cannot perform the duties in a manner that would not endanger his/her health or safety or the health or safety of others.

8. Time Off for Adult Literacy Programs

The School will reasonably accommodate and assist any employee who reveals a problem of illiteracy and requests employer assistance in enrolling in an adult literacy education program. Employees will be unpaid for time off and required to bear the cost associated with enrollment in an adult literacy education program, but the School will assist the employee by providing the locations of local literacy education programs. The School may also arrange for a literacy education provider to visit the School.

An employee who wishes to reveal a problem of illiteracy and request School assistance should contact Payroll/Human Resource Department. The School will take all reasonable steps to safeguard the employee's privacy. Nonexempt employees may use accrued PTO if available to make up for the work that is missed to attend literacy classes.

9. School Appearance and Child's School Activities

As required by law, GVA will permit an employee who is a parent or guardian (including a stepparent, foster parent, or grandparent) of school children, from kindergarten through grade twelve (12), or a child enrolled with a licensed child care provider, up to forty (40) hours of unpaid time off per child per school year (up to eight (8) hours in any calendar month of the school year) to participate in activities of a child's school or child care. If more than one (1) parent or guardian is an employee of GVA, the employee that first provides the leave request will be given the requested time off. Where necessary, additional time off will also be permitted where the school requires the employee(s) appearance.

The employee requesting school leave must provide reasonable advanced notice of the planned absence. The employee may use accrued but unused paid leave (e.g., PTO) to be paid during the absence.

When requesting time off for school activities, the employee must provide verification of participation in an activity as soon as practicable. When requesting time off for a required appearance, the employee(s) must provide a copy of the notice from the child's school requesting the presence of the employee.

10. Time Off to Serve as Election Official

Any employee who serves as an election official is eligible for unpaid leave on election day for purposes of service. Please notify your immediate supervisor of your commitment to act as election official as far in advance as possible.

11. Time Off for Jury and Witness Duty

For all exempt employees, the School will pay for time off if an employee is called to serve on a jury provided the employee continues to perform work duties as assigned. For all non-exempt employees, the School will pay

for up to three (3) days if you are called to serve on a jury or grand jury if the employee provides reasonable advance notice. Submission of a copy of Jury Summons is required. The School will also provide employees unpaid leave to appear in court or other judicial proceeding as a witness, as permitted by law, to comply with a valid subpoena or other court order. Please notify your immediate supervisor and Payroll/Human Resource Department of your commitment to serve on a jury or as a witness as far in advance as possible.

12. Victims of Abuse Leave

GVA provides reasonable and necessary unpaid leave and other reasonable accommodations to employees who are victims of domestic violence, sexual assault, or stalking. Such leave may be taken to attend legal proceedings or to obtain or attempt to obtain any relief necessary, including a restraining order, to ensure the employee's own health, safety or welfare, or that of the employee's child or children. Employees may also request unpaid leave for the following purposes:

- Seek medical attention for injuries caused by domestic violence, sexual assault, or stalking.
- Obtain services from a domestic violence shelter, program, or rape crisis center.
- Obtain psychological counseling for the domestic violence, sexual assault, or stalking.
- Participate in safety planning, such as relocation, to protect against future domestic violence, sexual assault, or stalking.

To request leave under this policy, an employee should provide GVA with as much advance notice as practicable under the circumstances. If advance notice is not possible, the employee requesting leave under this policy should GVA one (1) of the following certifications upon returning back to work:

1. A police report indicating that the employee was a victim of domestic violence, sexual assault, or stalking.
2. A court order protecting the employee from the perpetrator or other evidence from the court or prosecuting attorney that the employee appeared in court.
3. Documentation from a licensed medical professional, domestic violence or sexual assault counselor, licensed health care provider, or counselor showing that the employee's absence was due to treatment for injuries or abuse from domestic violence, sexual assault, or stalking.

Employees requesting leave under this policy may choose to use accrued paid leave. In addition, GVA will provide reasonable accommodations to employees who are victims of domestic violence, sexual assault or stalking for the employees' safety while at work. To request an accommodation under this policy, an employee should contact the CEO or designee.

13. Time Off for Victims of Crime

An Employee who is a victim of certain crimes (violent felonies, felony thefts and serious felonies as defined by law) or is an immediate family member of a victim, is a registered domestic partner of a victim or the child of a registered domestic partner of a victim will be given unpaid time off as necessary in accordance with the law. Employees may be required to provide reasonable advanced notice of the need for time off if feasible and documentation establishing the right to such time off may be requested. The School will take all reasonable steps to maintain the confidentiality of any employee requesting crime victim leave. Please notify your immediate supervisor and Payroll/Human Resource Department of your need for time off as far in advance as possible. As applicable, an employee may use accrued paid leave for crime victim leave purposes.

14. Time Off for Volunteer Firefighters

Employees who perform duties as a volunteer firefighter are entitled to an unpaid temporary leave of absence not to exceed an aggregate of 14 days per calendar year for the purpose of engaging in fire or law enforcement training. Employees must provide their immediate supervisor and Payroll/Human Resource Department with advanced notice of any training.

15. Time Off for Voting

Employees who do not have sufficient time outside of their regular working hours to vote in a statewide election may request time off to vote. If possible, employees should make their request at least two days in advance of the election. Up to two hours of paid time off will be provided, at the beginning or the end of the employee's regular shift, whichever will allow the most free time for voting and the least time off work. Please contact your immediate supervisor to request and schedule time off to vote.

16. Workers' Compensation Leave

GVA, in accordance with State law, provides insurance coverage for employees in case of work-related injuries. The workers' compensation benefits provided to injured employees may include:

- Medical care;
- Cash benefits, tax-free to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure you receive any worker's compensation benefits to which you may be entitled, you will need to:

- Immediately report any work-related injury to the Office Manager;
- Seek medical treatment and follow-up care if required;
- Complete a written Employee's Claim Form (DWC Form 1) and return it to the Office Manager; and
- Provide the School with a certification from your health care provider regarding the need for workers' compensation disability leave as well as your eventual ability to return to work from the leave.

It is the School's policy that when there is a job-related injury, the first priority is to ensure that the injured employee receives appropriate medical attention. GVA, with the help of its insurance carrier has selected medical centers to meet this need. Each medical center was selected for its ability to meet anticipated needs with high quality medical service and a location that is convenient to the School's operation.

- If an employee is injured on the job, he/she is to go or be taken to the approved medical center for treatment. If injuries are such that they require the use of emergency medical systems ("EMS") such as an ambulance, the choice by the EMS personnel for the most appropriate medical center or hospital for treatment will be recognized as an approved center.
- All accidents and injuries must be reported to the Principal and to the individual responsible for reporting to the School's insurance carrier. Failure by an employee to report a work-related injury by the end of his/her shift could result in loss of insurance coverage for the employee. An employee may choose to be treated by his/her personal physician at his/her own expense, but he/she is still required to go to the School's approved medical center for evaluation. All job-related injuries must be reported to the appropriate State Workers' Compensation Bureau and the insurance carrier.

- When there is a job-related injury that results in lost time, the employee must have a medical release from the School's approved medical facility before returning to work.
- Any time there is a job-related injury, the School's policy requires drug/alcohol testing along with any medical treatment provided to the employee.

17. Returning from Leave of Absence

Employees cannot return from a medical leave of absence without first providing a sufficient doctor's return to work authorization.

When business considerations require, the job of an employee on leave may be filled by a temporary or regular replacement. An employee should give the Payroll/Human Resources Department thirty (30) days' notice before returning from leave. Whenever the School is notified of an employee's intent to return from a leave, the School will attempt to place the employee in his former position or in a comparable position with regard to salary and other terms and conditions for which the employee is qualified. However, re-employment cannot always be guaranteed. If you need further information regarding Leaves of Absence, be sure to consult with the Payroll/Human Resources Department.

VI. Employment Evaluation and Separation

A. Employee Reviews and Evaluations

Each employee will receive periodic performance reviews conducted by their immediate supervisor. Performance evaluations will be conducted annually. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties or recurring performance issues.

Your performance evaluations may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude, and your attitude toward others. The performance evaluations are intended to make you aware of your progress, areas for improvement and objectives or goals for future work performance. Favorable performance evaluations do not guarantee increases in salary or promotions or retention of your job. Salary increases, promotions and job retention are solely within the discretion of the School and depend upon factors in addition to performance and budgetary constraints. After the review, you will be required to sign the evaluation report simply to acknowledge that it has been presented to you, that you have discussed it with your immediate supervisor and that you are aware of its contents. The evaluation system in no way alters the employment at-will relationship.

B. Discipline and Involuntary Termination

Violation of the School's policies and rules may warrant disciplinary action, which may take multiple forms, including verbal warnings, written warnings, suspensions or termination. The School's disciplinary system is informal and the School may, in its sole discretion, utilize any form of discipline it deems appropriate under the circumstances, up to and including termination of employment upon the first offense.

C. Voluntary Termination

Either the employee or the School may terminate the employment relationship at any time, with or without prior notice and with or without cause. While it is not required, the School requests that employees electing to resign to give as much advance notice as possible (preferably two weeks) to allow the School to plan for your departure.

An exit interview will normally be scheduled on the last day of work with Payroll/Human Resource Department. The purposes of the exit interview is to review eligibility for benefit conversion, to ensure that all necessary forms are completed, to collect any company property (including keys, equipment, documents and records) that may be in the employee's possession, to review the employee's obligations regarding confidential information, and to provide the employee with the opportunity to make any constructive comments and suggestions on improving the working environment at the School. The School appreciates receiving candid opinions of the employee's employment. Final pay, including pay for any earned but unused PTO time, will be provided in accordance with state law.

D. References

All requests for references and employment verifications must be promptly directed to Payroll/Human Resource Department. When contacted for employment verification, the School will only provide information concerning dates of employment and the title of the last position held. Other employees may not provide any employment verifications for any other employees. Principals and Vice Principals may provide reference information only when using the GVA standard reference template.

VII. Acknowledgement of Handbook and At Will Employment

I acknowledge that I have received Great Valley Academy's Employee Handbook. I have read the Handbook and understand the contents of the Handbook. I agree to abide by all of the School's policies.

I understand and agree to my at-will employment status as described in the Handbook, summarized as follows:

- ☐ This Handbook does not in any way reflect a contract of employment, either express or implied between me and the School.
- ☐ The School is an at-will employer. I am free to terminate the employment relationship with the School at any time; the School, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me for any or no reason at any time. Specifically, the School may modify all terms of employment including any policy or practice and/or my hours, wages, working conditions, job assignments, position title, compensation rates and benefits in its sole discretion.
- ☐ Nothing in this Handbook creates, or is intended to create, a promise or representation of continued employment or guaranteed terms and conditions of employment for me. Further, there is no agreement, express or implied, written or verbal, between the employee and the School for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment.

I understand that other than the Chief Executive Officer, no supervisor or representative of the School has the authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will. I understand that only the Chief Executive Officer or Chief Operating Officer has the authority to make any such agreement and then only in writing signed by the Chief Executive Officer.

ACKNOWLEDGEMENT OF 2022/23 EMPLOYEE HANDBOOK AND AT WILL EMPLOYMENT

Please sign and return to Human Resources.

I acknowledge that I have received Great Valley Academy's Employee Handbook. I have read the Handbook and understand the contents of the Handbook. I agree to abide by all of the School's policies.

I understand and agree to my at-will employment status as described in the Handbook, summarized as follows:

- This Handbook does not in any way reflect a contract of employment, either express or implied between me and the School.
- The School is an at-will employer. I am free to terminate the employment relationship with the School at any time; the School, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me for any or no reason at any time. Specifically, the School may modify all terms of employment including any policy or practice and/or my hours, wages, working conditions, job assignments, position title, compensation rates and benefits in its sole discretion.
- Nothing in this Handbook creates, or is intended to create, a promise or representation of continued employment or guaranteed terms and conditions of employment for me. Further, there is no agreement, express or implied, written or verbal, between the employee and the School for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment.

I understand that other than the Chief Executive Officer, no supervisor or representative of the School has the authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will. I understand that only the Chief Executive Officer or Chief Operating Officer has the authority to make any such agreement and then only in writing signed by the Chief Executive Officer.

Employee's Name: _____

Employee's Signature: _____

Date: _____

Great Valley Academy Modesto
March 2022

	A Actual YTD Jul 21 - Mar 22	B Revised Budget YTD Jul 21 - Mar 22	C Estimated Balance of year Apr 22-Jun 22	D Revised Budget Balance of year Apr 22-Jun 22	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	5,616,284	5,498,448	1,766,850	1,891,198	8,290,756	7,389,646	7,383,134
8100 · Federal Revenue	428,512	638,905	693,837	486,208	1,300,605	1,125,113	1,122,349
8300 · Other State Revenues	574,860	27,987	361,901	897,781	630,743	925,768	936,761
8600 · Other Local Revenue	322,646	276,012	85,354	-6,012	458,500	270,000	408,000
8700 · Selpa	375,555	351,642	138,088	111,398	463,040	463,040	513,643
Total Income	7,317,857	6,792,993	3,046,030	3,380,574	11,143,644	10,173,567	10,363,886
Gross Profit	7,317,857	6,792,993	3,046,030	3,380,574	11,143,644	10,173,567	10,363,886
Expense							
1000 · Certificated Salaries	2,595,966	2,665,987	1,201,326	1,161,306	3,906,294	3,827,293	3,797,292
2000 · Classified Salaries	1,504,316	1,596,857	847,161	754,619	2,231,245	2,351,476	2,351,476
3000 · Employee Benefits	1,082,061	1,107,235	705,617	680,443	1,705,219	1,787,678	1,787,678
4000 · Books & Supplies	670,938	764,212	291,692	198,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	911,115	1,039,820	454,009	325,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	50,335	58,365	25,365	78,000	75,700	75,700
7430 · All Other Financing Uses	159,046	159,046	88,978	88,333	247,379	247,379	248,024
Total Expense	6,940,777	7,383,491	3,647,148	3,233,789	11,008,402	10,617,280	10,587,925
Net Ordinary Income	377,080	-590,498	-601,119	146,785	135,241	-443,713	-224,039

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	P1 5,770,450.89	5,779,897.16	6,121,431.93	5,906,881.51	5,455,688.37		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00		395,405.00	474,716.00	237,359.00	237,359.00	237,358.00	0.00	3,603,155.00
EPA Funding	8012		0.00	534,335.00				534,336.00		367,312.00			546,092.00	0.00	1,982,075.00
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	270,932.00	135,466.00	224,708.00	112,354.00	112,354.00	112,354.00	112,354.00	1,656,254.00
Selpa Prop Tax	8097							0.00	82,384.00					59,266.00	141,650.00
Federal IDEA	8181													115,722.00	115,722.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	0.00	133,889.02		34,420.00	34,420.00	34,420.00	33,752.76	414,821.00
Title 1, Part A	8290							0.00						117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				83,774.53			162,398.26			160,998.71	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	0.00	9,906.72		2,500.00	2,500.00	2,500.00	4,996.17	33,000.00
Educator Effectiveness	8550							201,250.00						50,476.00	251,726.00
Mandated Cost Reimb	8550							15,255.00						0.00	15,255.00
Lottery	8560							65,433.41			42,541.20			36,513.48	144,488.09
Lottery, prop 20	8561										15,103.26			13,705.72	57,617.95
In Person Inst Grant 7422	8590		0.00	0.00				198,847.65					28,808.98	0.00	198,847.65
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							94,922.00		31,064.00				46,594.00	172,580.00
Other	8590												11,629.00	46,617.00	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			1,567.37		(8,328.00)			48,155.12	9,260.62	5,000.00
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	1,189.00	2,208.00	2,485.00			0.00	647.88	98,000.00
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	23,026.70	30,738.26	29,111.86	19,000.00	19,000.00	19,329.75	0.00	268,000.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,545.00	1,401.32	5,008.64	4,946.34	25,000.00	1,400.00	976.75	0.00	42,000.00
Selpa	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	46,495.00	91,418.00	45,709.00	45,709.00	46,670.00	0.00	513,643.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	905,373.21	1,491,934.98	841,500.64	1,217,433.20	696,384.72	452,742.00	1,088,293.60	808,609.34	10,363,886.19
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	316,887.27	317,333.92	314,790.84	324,677.73	324,677.73	551,970.37	0.00	3,797,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	158,090.27	184,913.42	172,976.62	202,840.45	202,840.45	441,479.80	0.00	2,351,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	142,489.32	137,860.15	131,712.08	145,745.20	145,745.20	414,126.77	0.00	1,787,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	71,994.19	28,217.32	61,515.14	85,000.00	85,000.00	121,691.84	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	79,906.85	81,445.64	84,942.72	125,000.00	125,000.00	204,009.40	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	0.00	0.00	0.00	10,000.00	3,000.00	45,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	53,634.76	0.00	248,024.12
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	787,039.66	767,442.21	783,609.16	910,935.14	903,935.14	1,832,277.94		10,587,925.01
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,853.77	704,895.32	74,058.43	433,824.04	(214,550.42)	(451,193.14)	(743,984.35)	808,609.34	(224,038.82)
Accruals Received		73,335.00		1,100,107.07				59,845.00							1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82	(216,187.44)	(64,612.16)	(92,289.27)					
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	5,770,450.89	5,779,897.16	6,121,431.93	5,906,881.51	5,455,688.37	4,711,704.03		

Great Valley Academy Salida
March 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Mar 22	Jul 21 - Mar 22	Apr 22-Jun 22	Apr 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	5,370,354	5,340,047	1,617,882	1,826,492	7,646,195	7,166,539	6,988,236
8100 · Federal Revenue	347,667	537,660	662,477	396,043	974,454	933,703	1,010,144
8300 · Other State Revenues	438,150	21,974	312,190	770,192	598,889	792,166	750,340
8600 · Other Local Revenue	159,512	146,731	75,488	63,269	327,500	210,000	235,000
8700 · SELPA	360,511	335,227	131,632	93,184	428,411	428,411	492,143
Total Income	6,676,194	6,381,639	2,799,669	3,149,180	9,975,449	9,530,819	9,475,864
Gross Profit	6,676,194	6,381,639	2,799,669	3,149,180	9,975,449	9,530,819	9,475,864
Expense							
1000 · Certificated Salaries	2,393,679	2,461,083	1,201,448	1,190,043	3,663,528	3,651,126	3,595,126
2000 · Classified Salaries	1,260,989	1,297,816	611,675	574,848	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	1,079,524	1,102,612	551,862	528,774	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	577,890	675,484	256,204	178,611	967,595	854,095	834,094
5000 · Services & Other Operating Exp	921,640	970,800	361,695	312,535	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	268,830	268,830	124,070	125,082	393,912	393,912	392,900
Total Expense	6,561,866	6,835,939	3,145,639	2,948,579	9,816,985	9,784,518	9,707,505
Net Ordinary Income	114,328	-454,300	-345,969	200,601	158,464	-253,699	-231,641

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	3,997,465.09	3,779,674.25		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	0.00	579,433.00	779,308.00	389,653.67	389,653.67	389,653.66	0.00	5,489,248.00
EPA Funding	8012	0.00	0.00	42,546.00		0.00	0.00	42,546.00		26,948.00			37,446.00	0.00	149,486.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	188,042.00	94,021.00	177,292.00	88,646.00	88,646.00	88,646.00	88,646.00	1,213,527.00
Selpa Prop Tax	8097							0.00	79,084.00					56,891.00	135,975.00
Federal IDEA	8100-8299												0.00	117,151.00	117,151.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	0.00	135,055.24	0.00	33,500.00	34,094.97	33,551.88	74,955.32	450,000.00
Title 1	8290				0.00									74,205.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			16,660.64	14,912.00		0.00				295,018.61	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	0.00	10,033.27	26,068.00	2,500.00	2,500.00	2,500.00	6,352.75	60,000.00
Educator Effectiveness	8550							174,749.00						43,687.00	218,436.00
Mandated Cost Reimb	8550							14,644.00						0.00	14,644.00
Lottery	8560							62,886.81			41,610.97			34,205.44	138,703.22
Lottery, prop 20	8561										0.00			55,311.10	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00				137,889.30						0.00	137,889.30
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							79,655.00						65,168.00	144,823.00
Other	8590													58,355.00	58,355.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	1,506.37		(27,746.00)				0.00	(77,821.31)
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,350.27	17,616.59	23,200.32	16,666.67	16,666.67	16,675.57	(0.00)	200,000.00
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	2,187.96	964.24	4,861.01	5,000.00	20,240.00	239.36	0.00	35,000.00
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	0.00	44,633.00	87,754.00	43,877.00	43,877.00	43,878.00	0.00	492,143.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	806,680.17	186,135.88	1,281,842.56	735,368.71	960,840.34	1,097,685.33	621,454.30	595,678.31	612,590.47	969,946.22	9,475,863.56
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	301,292.22	306,874.43	288,515.61	303,362.06	303,362.06	594,723.53	0.00	3,595,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	139,526.68	166,107.14	151,315.14	164,592.04	164,592.04	282,490.42	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	132,182.99	137,202.16	125,283.79	139,252.38	139,252.38	273,356.75	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	64,846.53	25,442.47	54,015.33	70,632.89	70,632.89	114,938.00	0.00	834,093.76
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	78,111.25	98,746.68	91,261.80	105,759.79	105,759.79	150,175.32	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	64,329.99	0.00	392,899.88
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	745,829.66	764,242.87	740,261.66	813,469.15	813,469.15	1,518,700.39		9,707,504.69
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	63,290.15	(588,846.46)	430,890.31	(10,460.95)	196,597.47	357,423.67	(192,014.85)	(217,790.84)	(906,109.92)	969,946.22	(231,641.13)
Accruals Received		25,326.89	55,932.54	2,082,840.92	68,009.97			118,006.70							2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	3,997,465.09	3,779,674.25	2,873,564.33		

Regular Meeting of the Board of Trustees

May 23, 2022, 5:30 pm
Great Valley Academy
1209 Woodrow Ave. Suite A-4
Modesto, CA 95350

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order to participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

c. MODESTO PRINCIPAL'S REPORT

d. SALIDA PRINCIPAL'S REPORT

e. HOMESCHOOL PRINCIPAL'S REPORT

f. CHIEF OPERATING OFFICER'S REPORT

g. CHIEF EXECUTIVE OFFICER'S REPORT

h. FOUNDER'S REPORT

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

- a. Approval of the Minutes of the Regular Board Meeting of April 25, 2022

f. ACTION ITEMS

- a. Approval of revised credentialed salary schedule
- b. Approval of revised classified salary schedule
- c. Approval of 2 year term extension ending 6/30/24 for Steve Payne
- d. Approval of new Board Member Jeremy Coe- Term: July 1, 2022-June 30, 2025

g. INFORMATION AND DISCUSSION

- a. Monthly Financials

h. FUTURE AGENDA ITEMS

- a. NEXT REGULAR BOARD MEETING- Monday June 27, 2022
~1209 Woodrow Ave., Suite A4 Modesto CA

i. CLOSED SESSION

- a. Public Employment
Title: Chief Executive Officer

j. RETURN TO OPEN SESSION

k. INFORMATION AND DISCUSSION

- a. Report out on Chief Executive Officer compensation package

l. ACTION ITEM

- a. Approval of Chief Executive Officer compensation package

m. FINAL ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.

Great Valley Academy Modesto
Charter School Monthly Summary Report

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%.

Note: Enrollment shows Apr 15-May 17

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	84	92.79	77.95	93.50	79.24
1	72	90.34	65.05	93.06	68.27
2	77	93.89	72.30	95.06	76.16
3	91	93.68	85.25	94.88	87.82
4	89	92.80	82.60	93.63	85.23
5	72	93.12	67.05	94.00	69.77
6	90	94.22	84.80	94.14	85.89
7	100	94.85	94.85	95.03	96.01
8	72	94.65	68.15	95.09	70.26
Total	747	93.44	698.00	94.29	718.67

2. Key Accomplishments:

CAASPP Testing
Spirit Day- Neon Day
Jog-A-Thon May 5, Total Raised:
Parents Return to Campus
Continued After/Before School Tutoring and Clubs
Paraprofessional Training-Working w Children in the Classroom
Center for Human Services Personal Wellness Presentation from Director, David Collins
All Staff Evaluations Complete

3. Upcoming Key Events/Activities:

8th Promotion Ceremony June 2
EOY Party June 3
Kids' Care Whole Staff Training
Closing Out 2021-2022
Pillars Team Retreat in July

Great Valley Academy Salida

Charter School Monthly Summary Report

May 23, 2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%

*May ADA is from 05/02-05/13

Grade	Enrollment	ADA	ADA %	ADA	YTD ADA
K	80	71.44	89.32	74.04	91.71
1	95	87.55	92.16	89.99	93.28
2	88	82.33	92.56	83.19	93.09
3	99	91.55	92.48	92.22	92.77
4	86	78.44	91.21	90.58	92.32
5	89	83.55	93.58	86.38	93.67
6	89	82.56	92.75	84.58	94.56
7	80	74.99	92.91	73.37	92.01
8	80	71.33	92.91	73.29	90.38
Total	786	726.11	92.91	738.00	92.47

2. Key Accomplishments:

- a. April 28th: Salida Leadership meeting
- b. April 28th: Collaborative Coffee
- c. April 30th: Spirit Day – 50s Day
- d. May 6th: Teacher in-service
- e. May 9th: CAASPP testing
- f. May 13th: Jog-a-thon water balloon day!
- g. May 13th: Incoming kinder assessment day
- h. May 13th: Shaffer Elementary campus visit
- i. May 17th: 8th grade Great Wolf Lodge trip
- j. May 20th: Jog-a-thon!

3. Upcoming Key Events/Activities:

- a. May 26th: Salida leadership meeting
- b. May 30th: No school – Memorial Day

- c. June 1st: Kinder promotion
- d. June 1st: 8th grade graduation
- e. June 2nd: End of year party
- f. June 3rd: Last day of school
- g. June/July: Summer school

Great Valley Academy Homeschool

Charter School Monthly Summary Report

May 23, 2022

Reporting Dates: 4/4/2022-4/14/2022

1. Enrollment Breakdown by Grade, Enrollment, ADA and ADA%. ADA goal is 96%.

Grade	Enrollment	ADA	ADA %	YTD ADA	YTD ADA%
K	9	96.2	8.6	99.47	7.69
1	9	100	9	96.65	9.35
2	8	100	8	97.20	6.56
3	3	100	3	96.61	2.12
4	9	100	9	99.71	9.54
5	4	100	4	95.41	3.93
6	9	100	9	95.64	7.12
7	7	76.19	5.3	92.47	5.64
8	7	88.88	6.2	97.77	7.11
Total	65	95.72	95.72	97.06	59.12

2. Key Accomplishments:

- a. April 29th—Spring NWEA Testing ended
- b. May 3rd—Homeschool Parent Orientation
- c. May 5th—Jog A Thon, first May Park Day
- d. May 6th—Teacher In-Service
- e. May 12th—May Park Day with guest Python Ron
- f. May 13th—Assignment Work Record #9
- g. May 19th—May Park Day with guest Magician Shawn Durham
- h. May 20th—CAASPP Testing ended

3. Upcoming Key Events/Activities:

- a. May 26th—Arts in the Park Annual Event
- b. May 27th—8th Grade Graduate Field Trip—Boomers
- c. May 30th—No School, Memorial Day
- d. June 1st—8th Grade Homeschool Graduation
- e. June 3rd—Last Day of School, Assignment Work Record #10
- f. June 6th—New Homeschool Principal onboarding begins
- g. June 7th—Homeschool Parent Orientation

Chief Operating Officer's Report
May 23, 2022
School Board Meeting



Process and Policy Updates

- ❖ Manage Campus Wellness Policy for Compliance – In Progress
- ❖ Continuing Education Unit and Transcript Evaluation Process – In Progress
- ❖ Assist with Managing Student Truancies – Ongoing

Multi-Campus Responsibilities

- ❖ Teacher Meetings for 22/23 Salary Scale Placement – Complete
- ❖ Continued Refinement of Salary Projections for 22/23 – Complete
- ❖ Serve on Interview Teams for CEO and Homeschool Principal – Complete
- ❖ Hiring for Campus Maintenance and Modesto KC Director – Complete
- ❖ Preparation for Annual Audit – Complete
- ❖ Managing COVID contact tracing – Ongoing
- ❖ Food Service Equipment Upgrades – In Progress
- ❖ Continued Marketing Efforts for 22/23 Enrollment – In Progress
- ❖ Budget Planning & Analysis for 22/23 – In Progress
- ❖ Evaluate Additional Medical Benefit Options for Staff – In Progress
- ❖ Restructuring Kids' Care Programs – In Progress
- ❖ Federal Funding Tracking – In Progress
- ❖ Paraprofessional CBEST Testing – In Progress
- ❖ Comprehensive Technology Plan Draft – In Progress
- ❖ Comprehensive Maintenance Plan Draft – In Progress
- ❖ Annual Website Review for Changes, Improvements and Refresh – In Progress
- ❖ Launch of SchoolWise Parent Portal – Summer 2022
- ❖ All Staff CPR, FA, and AED Training – In Progress (Modesto 50% - Salida 50%)

Website Analytics

- ❖ April 2022
 - ❑ 2,667 Users Visited (91.5% New/8.5% Returning)
 - ❑ 8,302 Page Views
 - ❑ Users Averaged 1:54 Minutes on the Site
 - ❑ 55.46% Mobile – 43.76% Desktop – 0.78% Tablet
 - ❑ Type: Organic 64.7% – Direct 28% – Referral 3.5% – Social 3.8%

Training

- ❖ Governor's Budget Workshop – May 2022
- ❖ Stanislaus County Health Services Agency Meeting for Schools – Ongoing
- ❖ New Legal Requirements – Ongoing
- ❖ New Audit Requirements – Ongoing
- ❖ New Funding Requirements – Ongoing
- ❖ SCOE CBO Meetings – Ongoing

Chief Executive Officer's Report
May 23rd, 2022
Board Meeting



State Accountability

- No data available (no testing 2020/21)
- NWEA data coming (June meeting)

External impact, linkages

- Involved in both California level charter school organizations
 - Legislative impact review, assessment
 - Providing advisory capacity as requested
- Regular meetings with SCOE Superintendent, Cabinet members
- Multiple community connection meetings, corporate and nonprofit leaders
- Monthly 360 Accelerator regional meetings
- Monthly SELPA PAC meetings
- Bi-Weekly SCOE Superintendent meetings
- CSDC annual conference, December 2021 (virtual attendance)
- Governor's budget virtual conference: January 2022 + May 2022

Multi Campus

- Multi campus staff doing a fabulous job of overseeing and running day to day operations in the everchanging landscape of the Covid environment
- Monitor & oversight of Covid-19 exposures and GVA response
- Covid-19 communication
- Monitor state, local Covid-19 data, recommendations and updates
- Monitor state budget impacts
- Monitor state legislative impacts
- Oversight of budget revision process
- Oversight of staff mental health service provision
- Oversight of student/parent mental health service provision
- Support/oversight of staff vaccination-testing protocols
- Support of student testing protocols
- Implementation & support of English Learner support position
- Implementation & support of Teacher Induction position
- Facilitation of first 2021-2022 surveys (staff, students, families)
- Marketing & Enrollment
 - Focus Group Facilitation (early December)
 - Parent Referral program-good participation
 - Intentional outreach to prior families-some response
 - Marketing collateral, delivered to area preschools
 - Enrollment meetings in progress-Lottery March 4th, 2022
- Facilitation of CEO replacement process



Homeschool

- Ongoing support of principal
 - Principal search 3.2022
 - Interviews week of 4/25
 - Internal candidate hired-Joy Kerr-Owens (Modesto campus)
- Implementation of independent study related changes
- Deep dive into process, procedures and policy (update/revise in alignment with GVA quality & Covid related protocol)
- Fabulous school year, bringing students & families back to the resource center, and families back to activities

Salida Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Added paved drop off/pick up access
- Positive transition to parent walk up for morning drop off
- Jogathon on track for a fabulous return

Modesto Campus

- Site staff doing a phenomenal job
 - Teachers, aides and all site staff continuously stepping up in support of what's best for students and each other
 - Site admin teams doing a fabulous job supporting staff, students & parents, overseeing all protocols, pivoting as needed and managing the myriad of day to day needs
 - Next level support of students and staff, subbing in classrooms with teachers out with subs committed at maximum capacity
 - Next level support with drop off and pick up
- Positive transition to parent walk up for morning drop off
- Jogathon was a tremendous success
- First ever academic pentathlon participation (3rd place overall!)

Campus Safety (All)

- Reflecting on safety, site specific
 - Ongoing conversation and fine tuning of processes
- Updated safety plans approved March 29, 2022



Founders Report
Great Valley Academy School Board
May 23, 2022

Vision screenings for staff and on campus students continue to be done on a weekly basis. The total screenings for the year will exceed 300, the highest number since the schools were open.

We have been working closely with the home school staff and families. We are now preparing to do trainings next fall with the new home school principal and any new staff.

Trainings have continued with the GVS staff and they continue to gain more knowledge in how to improve visual skills in GVA students.

I am pleased with the progress of the GVS staff to eventually do student evaluations and to establish training programs for students that need GVS intervention. They can also aid teachers in understanding the importance of visual skills for successful learning.

Eldon Rosenow, Founder

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
April 25, 2022

MINUTES

Members Present: Steve Payne, Yolanda Meraz, Susan Nisan (via phone)

Members Absent: Twila Tosh, Vince Jamison

Great Valley

Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Dr. Rosenow, Russ Howell, Mike Ruehle, Tarah Heilman, Keli Rupe, Megan Barajas, Lindsey Duran, Megan Ybarra

Audience Present: Jeremy Coe

Call to Order/

Pledge of Allegiance: Mr. Payne welcomed everyone and led the Pledge of Allegiance.

Communications: **COMMUNICATIONS**

Written

Communications: Letters to the GVA Board were read by Megan Barajas, Megan Ybarra and Lindsey Duran. Discussion followed.

Public Participation: None

Modesto Principal

Report: Mr. Ruehle reported that fundraising for the jog-a-thon is going very well and everyone is very excited about the event. He also spoke about the annual 7th Grade project which involved growing trout eggs in class and then releasing them into Lake Don Pedro. It's good to get back to normalcy and routine.

Salida Principal

Report: Mr. Howell reported that they are getting back to having parents back on campus for drop off once again. Parents are so excited to be able to walk their student's class again. He also said that the parents were excited to join in the Jog-a-thon kick off and that the fund raising goal for the event was hit 1 month before the event. The focus now is on finishing the year strong.

MINUTES

Regular Meeting of the Board

April 25, 2022

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Homeschool Principal

Report:

Mrs. Heilman said that they are wrapping up Thursday enrichments. Park Days are being held at Davis Park. It is a great way to build community and get parents networking and connecting.

Chief Operating

Officer's Report:

Mrs. Meeks highlighted the Kids Care program. Modesto has been without a Kids Care Director for awhile. Effective May 2nd there will be a new Director in Modesto. We are super excited to have filled this position from within.

Chief Executive

Officer's Report:

Ms. Silvestre Franklin talked about enrollment. ADA is ticking up little by little with weekly ADA being 94% for Modesto and 95% for Salida. Year to date ADA is 90%! Modesto is currently full and we have a good amount on the list to be able to fill in where kids leave. Salida has a number of spots available and some grades have no wait list.

Founder's Report:

Dr. Rosenow reported that GVS is working to finish the year strong!

Approval of Agenda/

Order of Agenda:

The motion was made by Ms. Meraz, seconded by Mr. Payne, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Ms. Meraz, seconded by Mr. Payne approving the consent agenda items. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

April 25, 2022

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Action Items:

ACTION ITEMS

a. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the SELPA MOU. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

b. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Updated 2022.2023 Modesto Academic Calendar. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

c. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Updated 2022.2023 Salida Academic Calendar. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

d. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Updated 2022.2023 Classified Holiday Schedule. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

e. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the 2022.2023 Board Meeting Calendar. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

MINUTES

Regular Meeting of the Board

April 25, 2022

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f. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Modesto Student Parent Handbook. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

g. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Salida Student Parent Handbook. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

h. The motion was made by Ms. Meraz, seconded by Mr. Payne approving the Employee Handbook. A roll call vote was taken.

AYES: Payne, Meraz, Nisan

NOES: None

ABSENT: Tosh, Jamison

ABSTENTIONS: None

Information and Discussion:

Monthly Financials

Both campuses showed an increase in the bottom line and have a positive cash flow.

Future Agenda Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Monday May 23, 2022- 5:30 p.m.
~1209 Woodrow Ave., Ste A4 Modesto

Adjournment:

The meeting was adjourned at 6:50 p.m. and the Board moved to Closed Session.

Re-open General Session:

Mr. Payne reported that no action was taken in closed session.

Adjournment:

Adjourned general session at 7:24 p.m.



Certificated Salary Scale

2022-23 Initial Placement Scale (Revised 5/11/2022)

	BASE		A		B		C		D		E		F
Year	BA/NC		BA+12		BA+24		BA+36		BA+48		BA+60		BA+72
1	\$57,200		\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719
2	\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719		\$61,326
3	\$58,350		\$58,933		\$59,523		\$60,118		\$60,719		\$61,326		\$61,939
4	\$58,933		\$59,523		\$60,118		\$60,719		\$61,326		\$61,939		\$62,559
5	\$59,523		\$60,118		\$60,719		\$61,326		\$61,939		\$62,559		\$63,184
6	\$59,523		\$60,719		\$61,326		\$61,939		\$62,559		\$63,184		\$63,816
7	\$59,523		\$61,326		\$61,939		\$62,559		\$63,184		\$63,816		\$64,454
8	\$59,523		\$61,939		\$62,559		\$63,184		\$63,816		\$64,454		\$65,099
9	\$59,523		\$62,559		\$63,184		\$63,816		\$64,454		\$65,099		\$65,750
10	\$59,523		\$63,184		\$63,816		\$64,454		\$65,099		\$65,750		\$66,407
11	\$59,523		\$63,184		\$64,454		\$65,099		\$65,750		\$66,407		\$67,071
12	\$59,523		\$63,184		\$65,099		\$65,750		\$66,407		\$67,071		\$67,742
13	\$59,523		\$63,184		\$65,750		\$66,407		\$67,071		\$67,742		\$68,420
14	\$59,523		\$63,184		\$66,407		\$67,071		\$67,742		\$68,420		\$69,104
15	\$59,523		\$63,184		\$67,071		\$67,742		\$68,420		\$69,104		\$69,795
16	\$59,523		\$63,184		\$67,742		\$68,420		\$69,104		\$69,795		\$70,493
17	\$59,523		\$63,184		\$68,420		\$69,104		\$69,795		\$70,493		\$71,198
18	\$59,523		\$63,184		\$69,104		\$69,795		\$70,493		\$71,198		\$71,910
19	\$59,523		\$63,184		\$69,795		\$70,493		\$71,198		\$71,910		\$72,629
20	\$59,523		\$63,184		\$70,493		\$71,198		\$71,910		\$72,629		\$73,355
25	\$59,523		\$63,184		\$71,198		\$71,910		\$72,629		\$73,355		\$74,089

Certificated employees new to GVA will receive .5 credit for years of teaching for placement on scale.

Changes in salary are contingent upon budget availability.

Pending Board Approval (Changes from 3/29/22 board approved scale highlighted)



Certificated Salary Scale

2023-24 and Future Years (Revised 5/11/2022)

	BASE		A		B		C		D		E		F
Year	BA/NC		BA+12		BA+24		BA+36		BA+48		BA+60		BA+72
1	\$57,200		\$57,772		\$58,350		\$58,933		\$59,523		\$60,118		\$60,719
2	\$58,400		\$58,972		\$59,550		\$60,133		\$60,723		\$61,318		\$61,919
3	\$59,600		\$60,172		\$60,750		\$61,333		\$61,923		\$62,518		\$63,119
4	\$60,800		\$61,372		\$61,950		\$62,533		\$63,123		\$63,718		\$64,319
5	\$62,000		\$62,572		\$63,150		\$63,733		\$64,323		\$64,918		\$65,519
6	\$62,000		\$63,772		\$64,350		\$64,933		\$65,523		\$66,118		\$66,719
7	\$62,000		\$64,972		\$65,550		\$66,133		\$66,723		\$67,318		\$67,919
8	\$62,000		\$66,172		\$66,750		\$67,333		\$67,923		\$68,518		\$69,119
9	\$62,000		\$67,372		\$67,950		\$68,533		\$69,123		\$69,718		\$70,319
10	\$62,000		\$68,572		\$69,150		\$69,733		\$70,323		\$70,918		\$71,519
11	\$62,000		\$68,572		\$70,350		\$70,933		\$71,523		\$72,118		\$72,719
12	\$62,000		\$68,572		\$71,550		\$72,133		\$72,723		\$73,318		\$73,919
13	\$62,000		\$68,572		\$72,750		\$73,333		\$73,923		\$74,518		\$75,119
14	\$62,000		\$68,572		\$73,950		\$74,533		\$75,123		\$75,718		\$76,319
15	\$62,000		\$68,572		\$75,150		\$75,733		\$76,323		\$76,918		\$77,519
16	\$62,000		\$68,572		\$76,350		\$76,933		\$77,523		\$78,118		\$78,719
17	\$62,000		\$68,572		\$77,550		\$78,133		\$78,723		\$79,318		\$79,919
18	\$62,000		\$68,572		\$78,750		\$79,333		\$79,923		\$80,518		\$81,119
19	\$62,000		\$68,572		\$79,950		\$80,533		\$81,123		\$81,718		\$82,319
20	\$62,000		\$68,572		\$81,150		\$81,733		\$82,323		\$82,918		\$83,519
25	\$62,000		\$68,572		\$82,350		\$82,933		\$83,523		\$84,118		\$84,719

Certificated employees new to GVA will receive .5 credit for years of teaching for placement on scale.

Changes in salary are contingent upon budget availability.

Pending Board Approval (Changes from 3/29/22 board approved scale highlighted)

Great Valley Academy Charter School
Classified Staff Salary Guide
Effective 2022-2023 (Revised 5/11/2022)



Classified Hourly Position	Hourly Range	
Instructional Aides/Kids' Care Aides/Paraprofessionals	\$16.00	\$25.00
Clerical/Office Assistant/Parent Liaison	\$16.00	\$21.50
Attendance Clerk	\$16.00	\$25.00
GVS Aides/Paraprofessionals	\$16.00	\$25.00
GVS Supervisor	\$18.00	\$30.00
Food Services Technician	\$16.00	\$21.50
Food Services Aide	\$16.00	\$19.00
Health Clerk	\$16.00	\$21.50
Health Technician (with license)	\$21.00	\$26.00
IT Technician	\$17.00	\$24.00
Maintenance Technician	\$17.00	\$25.00
Administrative Assistant	\$20.00	\$32.00
Office Manager I	\$20.00	\$30.00
Accounting Technician	\$17.00	\$23.00
Business Office Technician	\$17.00	\$23.00
Kids' Care Director	\$18.00	\$25.00
Speech-Language Pathologist Assistant	\$35.00	\$45.00

Classified Salary Position	Salary Range	
Maintenance Manager	\$62,400	\$69,720
Speech Language Pathologist	\$62,400	\$79,200
Classified Teacher (11 Month)	\$57,200	\$72,000

Classified Confidential Administrative Position*	Salary Range	
Payroll/HR Manager	\$23.00	\$33.00
IT Manager	\$23.00	\$33.00
Program Manager, Multi-Campus Operations	\$62,400	\$74,000
Executive Assistant	\$62,400	\$69,000
Accounting Manager	\$62,400	\$84,000

*The confidential administrative positions will be placed on the salary schedule per its determination on an individual, case by case basis, based upon factors including but not limited to: years or experience in various business, industry, education, life experience, etc.

Changes in salary are contingent upon budget availability.

Pending Board Approval (Changes from 3/29/22 board approved scale highlighted)



item c.

Approval of 2 year term extension ending 6/30/24
for Steve Payne

item d.

Approval of new Board Member Jeremy Coe- Term:
July 1, 2022-June 30, 2025

Great Valley Academy Modesto
April 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Apr 22	Jul 21 - Apr 22	May 22-Jun 22	May 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	5,965,996	5,847,392	1,417,138	1,542,254	8,290,756	7,389,646	7,383,134
8100 · Federal Revenue	628,158	673,325	544,190	451,788	1,300,605	1,125,113	1,172,349
8300 · Other State Revenues	771,717	69,676	194,181	856,092	630,743	925,768	965,898
8600 · Other Local Revenue	356,051	291,012	67,826	-21,012	458,500	270,000	423,877
8700 · Selpa	421,264	389,642	92,379	73,398	463,040	463,040	513,643
Total Income	8,143,186	7,271,047	2,315,714	2,902,520	11,143,644	10,173,567	10,458,901
Gross Profit	8,143,186	7,271,047	2,315,714	2,902,520	11,143,644	10,173,567	10,458,901
Expense							
1000 · Certificated Salaries	2,914,072	3,005,665	883,220	821,628	3,906,294	3,827,293	3,797,292
2000 · Classified Salaries	1,673,952	1,799,697	677,524	551,779	2,231,245	2,351,476	2,351,476
3000 · Employee Benefits	1,214,209	1,252,980	573,469	534,698	1,705,219	1,787,678	1,787,678
4000 · Books & Supplies	759,264	849,212	203,366	113,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	984,091	1,164,820	381,034	200,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	50,335	58,365	25,365	78,000	75,700	75,700
7430 · All Other Financing Uses	176,718	176,718	71,307	70,661	247,379	247,379	248,024
Total Expense	7,739,641	8,299,426	2,848,284	2,317,854	11,008,402	10,617,280	10,587,925
Net Ordinary Income	403,546	-1,028,379	-532,570	584,666	135,241	-443,713	-129,024

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	P1 5,770,450.89	5,779,897.16	6,121,431.93	6,092,834.73	5,670,773.59		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00		395,405.00	474,716.00	237,358.00	237,359.00	237,359.00	0.00	3,603,155.00
EPA Funding	8012		0.00	534,335.00				534,336.00		367,312.00			546,092.00	0.00	1,982,075.00
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	270,932.00	135,466.00	224,708.00	112,354.00	112,354.00	112,354.00	112,354.00	1,656,254.00
Selma Prop Tax	8097							0.00	82,384.00					59,266.00	141,650.00
Federal IDEA	8181													115,722.00	115,722.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	0.00	133,889.02		89,878.70	34,420.00	34,420.00	28,294.06	464,821.00
Title 1, Part A	8290							0.00						117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				83,774.53			109,768.00			213,628.97	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	0.00	9,906.72		43,703.78	(12,500.00)	2,500.00	2,618.39	56,826.00
Educator Effectiveness	8550							201,250.00						50,476.00	251,726.00
Mandated Cost Reimb	8550							15,255.00						0.00	15,255.00
Lottery	8560							65,433.41			42,541.20			36,513.48	144,488.09
Lottery, prop 20	8561										15,103.26			13,705.72	57,617.95
In Person Inst Grant 7422	8590		0.00	0.00				198,847.65					28,808.98	0.00	198,847.65
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00			0.00			0.00	0.00
Exp Lrng Opp Program	8590							94,922.00		31,064.00	15,532.00	15,532.00	15,530.00	0.00	172,580.00
Other	8590										17,249.15		11,629.00	29,367.85	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			1,567.37		(8,328.00)	62,727.00		0.00	0.00	10,311.26
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	1,189.00	2,208.00	2,485.00	1,525.00		0.00	0.00	98,877.12
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	23,026.70	30,738.26	29,111.86	24,629.75	19,000.00	18,700.00	0.00	273,000.00
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,545.00	1,401.32	5,008.64	4,946.34	7,250.76	30,000.00	125.99	0.00	52,000.00
Selma	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	46,495.00	91,418.00	45,709.00	45,709.00	46,670.00	0.00	513,643.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	905,373.21	1,491,934.98	841,500.64	1,217,433.20	825,329.60	481,874.00	1,054,188.97	779,651.47	10,458,900.57
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	316,887.27	317,333.92	314,790.84	318,106.29	324,677.73	558,541.81	0.00	3,797,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	158,090.27	184,913.42	172,976.62	169,636.72	202,840.45	474,683.53	0.00	2,351,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	142,489.32	137,860.15	131,712.08	132,148.09	145,745.20	427,723.88	0.00	1,787,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	71,994.19	28,217.32	61,515.14	88,325.44	85,000.00	118,366.40	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	79,906.85	81,445.64	84,942.72	72,975.45	125,000.00	256,033.95	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	0.00	0.00	0.00	0.00	3,000.00	55,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	53,634.76	0.00	248,024.12
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	787,039.66	767,442.21	783,609.16	798,863.75	903,935.14	1,944,349.33		10,587,925.01
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,853.77	704,895.32	74,058.43	433,824.04	26,465.85	(422,061.14)	(890,160.37)	779,651.47	(129,024.44)
Accruals Received		73,335.00		1,100,107.07				59,845.00							1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82	(216,187.44)	(64,612.16)	(92,289.27)	(55,063.05)				
Line of Credit (1,000,000)															0.00
Loan From Manteca (to Manteca)	0														0.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	5,770,450.89	5,779,897.16	6,121,431.93	6,092,834.73	5,670,773.59	4,780,613.23		

Great Valley Academy Salida
April 2022

	A Actual YTD	B Revised Budget YTD	C Estimated Balance of year	D Revised Budget Balance of year	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending
	Jul 21 - Apr 22	Jul 21 - Apr 22	May 22-Jun 22	May 22-Jun 22			A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	5,848,654	5,881,755	1,139,582	1,284,784	7,646,195	7,166,539	6,988,236
8100 · Federal Revenue	493,879	571,160	516,266	362,543	974,454	933,703	1,010,144
8300 · Other State Revenues	574,823	65,285	215,431	726,881	598,889	792,166	790,254
8600 · Other Local Revenue	202,903	164,198	57,655	45,802	327,500	210,000	260,558
8700 · SELPA	404,388	370,928	87,755	57,483	428,411	428,411	492,143
Total Income	7,524,647	7,053,326	2,016,688	2,477,493	9,975,449	9,530,819	9,541,335
 Gross Profit	 7,524,647	 7,053,326	 2,016,688	 2,477,493	 9,975,449	 9,530,819	 9,541,335
Expense							
1000 · Certificated Salaries	2,694,257	2,782,445	900,869	868,681	3,663,528	3,651,126	3,595,126
2000 · Classified Salaries	1,423,956	1,462,408	448,708	410,256	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	1,208,151	1,241,865	423,235	389,521	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	662,136	756,117	171,957	97,978	967,595	854,095	834,094
5000 · Services & Other Operating Exp	1,007,756	1,076,560	275,579	206,775	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	298,700	298,700	94,200	95,212	393,912	393,912	392,900
Total Expense	7,354,270	7,677,408	2,353,234	2,107,110	9,816,985	9,784,518	9,707,505
 Net Ordinary Income	 170,376	 -624,083	 -336,546	 370,384	 158,464	 -253,699	 -166,169

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	4,245,527.98	4,063,329.47		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	0.00	579,433.00	779,308.00	389,654.00	389,653.67	389,653.33	0.00	5,489,248.00
EPA Funding	8012	0.00	0.00	42,546.00		0.00	0.00	42,546.00		26,948.00			37,446.00	0.00	149,486.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	188,042.00	94,021.00	177,292.00	88,646.00	88,646.00	88,646.00	88,646.00	1,213,527.00
Selpa Prop Tax	8097							0.00	79,084.00					56,891.00	135,975.00
Federal IDEA	8100-8299												0.00	117,151.00	117,151.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	0.00	135,055.24	0.00	69,302.11	34,094.97	33,551.88	39,153.21	450,000.00
Title 1	8290				0.00									74,205.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			16,660.64	14,912.00		0.00	76,909.00			218,109.61	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	0.00	10,033.27	0.00	4,831.24	21,225.00	2,500.00	4,864.51	53,500.00
Educator Effectiveness	8550							174,749.00						43,687.00	218,436.00
Mandated Cost Reimb	8550							14,644.00						0.00	14,644.00
Lottery	8560							62,886.81			40,885.55			34,930.86	138,703.22
Lottery, prop 20	8561										14,515.46			40,795.64	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00				137,889.30						0.00	137,889.30
Expanded Lrng Opp Grant 7425	8590		0.00	0.00				0.00						0.00	0.00
Exp Lrng Opp Program	8590							79,655.00		26,068.00	13,034.00	13,034.00	13,032.00	0.00	144,823.00
Other	8590										16,993.13			41,361.87	58,355.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	1,506.37		(27,746.00)	46,414.00			0.00	(31,407.31)
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,350.27	17,616.59	23,200.32	24,821.67	20,500.00	16,675.57	0.00	211,988.34
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	2,187.96	964.24	4,861.01	18,569.36	20,240.00	239.36	0.00	48,569.36
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	0.00	44,633.00	87,754.00	43,877.00	43,877.00	43,878.00	0.00	492,143.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	806,680.17	186,135.88	1,281,842.56	735,368.71	960,840.34	1,097,685.33	848,452.52	631,270.64	625,622.14	759,795.70	9,541,335.26
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	301,292.22	306,874.43	288,515.61	300,578.59	303,362.06	597,507.00	0.00	3,595,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	139,526.68	166,107.14	151,315.14	162,966.92	164,592.04	284,115.54	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	132,182.99	137,202.16	125,283.79	128,626.76	139,252.38	283,982.37	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	64,846.53	25,442.47	54,015.33	84,246.35	70,632.89	101,324.54	0.00	834,093.76
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	78,111.25	98,746.68	91,261.80	86,115.87	105,759.79	169,819.24	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	64,329.99	0.00	392,899.88
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	745,829.66	764,242.87	740,261.66	792,404.48	813,469.15	1,539,765.06		9,707,504.69
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	63,290.15	(588,846.46)	430,890.31	(10,460.95)	196,597.47	357,423.67	56,048.04	(182,198.51)	(914,142.92)	759,795.70	(166,169.43)
Accruals Received		25,326.89	55,932.54	2,082,840.92	68,009.97			118,006.70							2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)															
Mortgage & Const Loan (Paid)															
Const costs from loan to BS															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	4,245,527.98	4,063,329.47	3,149,186.55		

Regular Meeting of the Board of Trustees

Thursday June 23, 2022- 5:00 p.m.

Great Valley Academy

1209 Woodrow Ave. Suite A-4

Modesto, CA 95350

and

Via Phone from

256 Curtis Dr.

Forsyth, Missouri

1-669-900-6833

a. CALL TO ORDER

b. PLEDGE OF ALLEGIANCE

c. COMMUNICATIONS

a. WRITTEN COMMUNICATION

b. PUBLIC PARTICIPATION

Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, board members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Great Valley Academy ("GVA") may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order participate in Board meetings are invited to contact the GVA main office in person or by calling 209-576-2283.

d. APPROVAL OF AGENDA AND ORDER OF AGENDA

e. CONSENT AGENDA

Consent Agenda information has been forwarded to each Board Member prior to this meeting for study and is on file at the Great Valley Academy office, 3200 Tully Road, Modesto. Copies of the complete agenda are available at the Board meeting. The Board in one motion acts on items listed on the Consent Agenda. There is no discussion of these items prior to the Board vote unless a member of the Board, staff or the public requests special items be discussed or removed from the Consent Agenda

a. Approval of the Minutes of the Regular Board Meeting of May 23, 2022

b. Approval of Modesto Educational Protection Act (EPA) spending

c. Approval of Salida Educational Protection Act (EPA) spending

f. PUBLIC HEARING

- a. Public Hearing of Review of Draft of Local Control and Accountability Plan(LCAP)- Modesto
- b. Public Hearing of Review of Draft of Local Control and Accountability Plan (LCAP)- Salida

g. ACTION ITEMS

- a. Approval of 2022/2023 Modesto Budget
- b. Approval of 2022/2023 Salida Budget
- c. Approval of Updated Wellness Policy
- d. Approval of 401(k) Resolution
- e. Approval of Local Control & Accountability Plan (LCAP) - Modesto
- f. Approval of Local Control & Accountability Plan (LCAP) - Salida

h. INFORMATION AND DISCUSSION

- a. Monthly financials
- b. Modesto Survey result highlights
- c. Salida Survey result highlights
- d. Modesto Local Priority 1 self-reflection
- e. Salida Local Priority 1 self-reflection
- f. Modesto Academic Standards, Local Priority 2 self-reflection
- g. Salida Academic Standards, Local Priority 2 self-reflection
- h. Modesto Family Engagement, Local Priority 3 self-reflection
- i. Salida Family Engagement, Local Priority 3 self-reflection
- j. Modesto School Climate, Local Priority 6 self-reflection
- k. Salida School Climate, Local Priority 6 self-reflection
- l. Modesto Broad Course of Study, Local Priority 7 self-reflection
- m. Salida Broad Course of Study, Local Priority 7 self-reflection

i. FUTURE AGENDA ITEMS

- a. **NEXT REGULAR BOARD MEETING** – August 1, 2022 (if needed) or August 29, 2022
~1209 Woodrow Ave., Suite A4 Modesto- 5:30 p.m.

j. FINAL ADJOURNMENT

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all, of the Board members shall be available for public inspection at 3200 Tully Rd., Modesto CA 95350.



NOTICE OF PUBLIC HEARING

Great Valley Academy hereby gives notice that a public hearing will be held as follows:

TOPIC OF HEARING:

- a. Review of Draft of Local Control and Accountability Plan (LCAP)- Modesto**
- b. Review of Draft of Local Control and Accountability Plan (LCAP)- Salida**

MEETING DETAILS:

Date: Thursday June 23, 2022

Time: 5:00 p.m

Location: 1209 Woodrow Ave., Suite A4 Modesto CA

Process for Making Public Comments: Members of the public are encouraged to submit comments via email at publiccomment@greatvalleyacademy.com. Comments must be received by noon (12:00 p.m.) on the day of the public hearing..

GREAT VALLEY ACADEMY
REGULAR MEETING OF THE BOARD OF TRUSTEES
May 23, 2022

MINUTES

Members Present: Steve Payne, Twila Tosh, Yolanda Meraz, Susan Nisan

Members Absent: Vince Jamison

Great Valley Academy Staff Present: Leah Silvestre Franklin, Marisa Meeks, Russell Howell, Michael Ruehle, Tarah Heilman, Dr. Rosenow, Kelli Rupe

Audience Present: Tom Anderson

**Call to Order/
Pledge of Allegiance:** Mr. Payne called the meeting to order and led the Pledge of Allegiance.

Communications: **COMMUNICATIONS**

Written Communications: Mr. Payne read a letter from Jeremy Coe expressing his pleasure at being considered for a position on the GVA Board.

Public Participation: None

Modesto Principal Report: Mr. Ruehle reported on Kinder Experience Day. Incoming kinder parents came in for a presentation and got to tour the classrooms. This allows students a glimpse into the day they will have and it allows teachers to do a little assessment on them to help build out next year's kinder classes.

Salida Principal Report: Mr. Howell reported that Jog a thon was a huge success. The goal was \$39,300 and they hit over \$83,000. He also said that they have met with the music director from Gregori High and are being offered incredible support to rebuild their music program.

Homeschool Principal Report: Mrs. Heilman talked about the transition from enrichment to park days saying that it gives everyone opportunity to interact with peers and allows homeschool parents to meet and interact. Our new Homeschool Principal, Joy Kerr-Owens, was able to go to one of the days and meet everyone. She also thanked Mr. Ruehle for

MINUTES

Regular Meeting of the Board

March 23, 2022

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allowing the homeschool students to participate in the Modesto Jog A Thon.

Chief Operating Officer's Report:

Mrs. Meeks reported on meeting with every teacher in the organization to place them in the certificated salary schedule. She said that teachers were appreciative and feel that this is a very competitive scale for them. Overall it was very well received. She also reported that the interim audit letter showed no exceptions for the Spring audit.

Chief Executive Officer's Report:

Ms. Silvestre Franklin gave an update on ADA saying that year to date was 94% for Modesto and 92.5% for Salida. During Covid it was down to around 80%. Kids are excited and they are here! She also welcomed Tom Anderson and Joy Kerr-Owens to their new GVA positions as well as Jeremy Coe to his position on the GVA Board.

Founder's Report:

Dr. Rosenow said that the GVS team is always trying to bring the two campuses together and they have been able to pioneer an intervention program in Salida that they have seen work very well in Modesto.

Approval of Agenda/ Order of Agenda:

The motion was made by Ms. Meraz, seconded by Mrs. Nisan, approving the Agenda and Order of Agenda. A roll call vote was taken.

AYES: Meraz, Payne, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

Consent Agenda:

CONSENT AGENDA

The motion was made by Ms. Tosh, seconded by Mr. Payne approving the consent agenda items. A roll call vote was taken.

AYES: Meraz, Payne, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

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March 23, 2022

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Action Items:

ACTION ITEMS

a. The motion was made by Mrs. Nisan, seconded by Ms. Meraz approving the revised credentialed salary schedule. A roll call vote was taken.

AYES: Meraz, Payne, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

b. The motion was made by Mrs. Nisan, seconded by Ms. Tosh approving the revised classified schedule. A roll call vote was taken.

AYES: Meraz, Payne, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

c. The motion was made by Ms. Meraz, seconded by Mrs. Nisan approving the 2 year term extension of Steve Payne. A roll call vote was taken.

AYES: Meraz, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: Payne

d. The motion was made by Ms. Tosh, seconded by Mrs. Nisan approving new board member Jeremy Coe with the change that he will start 6/1/22 rather than 7/1/22. A roll call vote was taken.

AYES: Meraz, Payne, Nisan, Tosh

NOES: None

ABSENT: Jamison

ABSTENTIONS: None

Information and

Discussion:

Monthly Financials

Both campuses are on budget.

MINUTES

Regular Meeting of the Board

March 23, 2022

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Future Agenda

Items:

FUTURE AGENDA ITEMS

Next Regular Board Meeting – Thursday June 23, 2022~ 5:00 p.m.
~1209 Woodrow Ave., Suite 4 Modesto

Adjournment:

The meeting was adjourned at 6:11 p.m. and the Board moved to Closed Session. Mrs. Nisan left meeting before closed session began.

Re-open General Session:

Mr. Payne reported the following regarding CEO compensation package from closed session:

Pursuant to government code section 54953, the following must be publicly reported before the board approves the item.

Specifically pursuant to the proposed compensation package the CEO would earn for each of the following elements of compensation:

Annual base salary \$155,000

Annual CalSTRS retirement*(employer contribution) \$29,605

Annual automobile allowance \$2,400

Annual medical premium *(employer contribution) \$4,585.02

Annual life insurance premium *(employer contribution) \$16.80

Total annual compensation \$191,606.82

Change of title from CEO to CEO/Superintendent was also discussed.

a. The motion was made by Ms. Meraz, seconded by Ms. Tosh approving the CEO compensation package. A roll call vote was taken.

AYES: Meraz, Tosh, Payne

NOES: None

ABSENT: Nisan, Jamison

ABSTENTION: None

b. The motion was made by Ms. Meraz, seconded by Ms. Tosh approving the change of title from CEO to CEO/Superintendent. A roll call vote was taken.

AYES: Meraz, Tosh, Payne

NOES: None

ABSENT: Nisan, Jamison

ABSTENTION: None

Adjournment:

Adjourned general session at 6:25 p.m.



RESOLUTION FOR ADOPTING THE EDUCATION PROTECTION ACCOUNT

Resolution Number: 16.01 (Revised 6.16.22)

WHEREAS, the voters approved Proposition 30 on November 6, 2012 and Proposition 55 on November 8, 2016;

WHEREAS, Proposition 30 added Article XIII, Section 36 to the California Constitution effective November 7, 2012 (setting 12/31/2017), and Proposition 55 Article XIII, Section 36 to the California Constitution effective November 8, 2016 (commencing 01/01/2018);

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

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

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

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

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

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

THEREFORE BE IT RESOLVED that the moneys received from the Education Protection Account shall be spent as required by Article XIII Section 36 in the following manner:

THE FOREGOING RESOLUTION was introduced at a regular meeting of the Great Valley Academy BOARD OF EDUCATION held on the 23rd day of June, 2022 by Board of Education Member _____, who made the motion, which motion duly seconded by _____, was upon roll call, carried into Resolution and passed by the following vote:

Ayes:

Nays:

Absent:

I, _____, Secretary to the Board of Education of the Great Valley Academy Board of Education, do certify that the foregoing is a true and correct copy of the RESOLUTION adopted by the School Board of Education of the Great Valley Academy at a regular meeting of the Board of Education on _____, which RESOLUTION is on file in the office of the Great Valley Academy district, Stanislaus County.

Date: _____

Signed: _____



Great Valley Academy – Modesto

Great Valley Academy - Salida

2022-2023 Education Protection Account (EPA) Spending Plan

Proposition 30, The Schools and Local Public Safety Protection Act of 2012, approved by the voters on November 6, 2012, temporarily increases the states sales tax rate for all taxpayers and the personal income rates for upper-income taxpayers.

Proposition 55, approved by the voters on November 8, 2016, creates in the state General fund an Education Protection Account to receive and disburse the revenues derived from the incremental increases in taxes imposed by Article XIII, Section 36(f).

The revenues generated from Proposition 30 are deposited into a newly created state account called the Education Protection Act (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of statewide revenue limit amount. A corresponding reduction is made to a LEAs revenue limit EPA entitlement. LEAs will receive EPA payments quarterly beginning with the 2014-2015 Fiscal Year.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- *The spending plan must be approved by the governing board during a public meeting
- *EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs
- *Refer to the attached list of functions for which EPA funds may be used
- *Each year, the local agency must publish an accounting of how much money was received from the EPA and how the funds were expended

Great Valley Academy-Modesto Estimated 2022-2023 EPA	\$2,136,667
Great Valley Academy-Salida Estimated 2022-2023 EPA	\$ 149,486

It is proposed that 100% of EPA funds be used to cover salary and benefit costs of non-administrative certificated staff.

**2022-2023 Education Protection Act
Program Plan
Great Valley Academy-Modesto**

Plan For Expenditures through: June 30, 2023

For Fund 09-Resource 1400-Education Protection Account

Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Revenue Limit Sources	8010-8099	\$2,136,667
Federal Revenue	8100-8299	
Other State Revenue	8300-8599	
Other Local Revenue	8600-8799	
All Other Financing Sources and Contributions	8900-8999	
Deferred Revenue	9650	
TOTAL AVAILABLE		\$2,136,667
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)	Function	
Instruction	1000-1999	\$2,136,667
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	
AU of a Multidistrict SELPA	2200	
Instructional Library, Media and Technology	2420	
Other Instructional Resources	2490-2495	
School Administration	2700	
Pupil Services		
Guidance and Counseling Services	3110	
Psychological Services	3120	
Attendance and Social Work Services	3130	
Health Services	3140	
Speech Pathology and Audiology Services	3150	
Pupil Testing Services	3160	
Pupil Transportation	3600	
Food Services	3700	
Other Pupil Services	3900	
Ancillary Services	4000-4999	
Community Services	5000-5999	
Enterprise	6000-6999	
General Admission	7000-7999	
Plant Services	8000-8999	
Other Outgo	9000-9999	
TOTAL EXPENDITURES AND OTHER FINANCING USES		\$2,136,667
BALANCE (Total available minus total expenditures and other financing		\$ -

**2022-2023 Education Protection Act
Program Plan
Great Valley Academy-Salida**

Plan For Expenditures through: June 30, 2023

For Fund 09-Resource 1400-Education Protection Account

Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Revenue Limit Sources	8010-8099	\$149,486
Federal Revenue	8100-8299	
Other State Revenue	8300-8599	
Other Local Revenue	8600-8799	
All Other Financing Sources and Contributions	8900-8999	
Deferred Revenue	9650	
TOTAL AVAILABLE		\$149,486
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)	Function	
Instruction	1000-1999	\$149,486
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	
AU of a Multidistrict SELPA	2200	
Instructional Library, Media and Technology	2420	
Other Instructional Resources	2490-2495	
School Administration	2700	
Pupil Services		
Guidance and Counseling Services	3110	
Psychological Services	3120	
Attendance and Social Work Services	3130	
Health Services	3140	
Speech Pathology and Audiology Services	3150	
Pupil Testing Services	3160	
Pupil Transportation	3600	
Food Services	3700	
Other Pupil Services	3900	
Ancillary Services	4000-4999	
Community Services	5000-5999	
Enterprise	6000-6999	
General Admission	7000-7999	
Plant Services	8000-8999	
Other Outgo	9000-9999	
TOTAL EXPENDITURES AND OTHER FINANCING USES		\$149,486
BALANCE (Total available minus total expenditures and other financing		\$ -

Modesto
Budget Comparison
2021-2022 Approved Budget (November 2021)
2022-2023 Proposed Budget (June 2022)

	2021-2022 Proposed Operating Budget Nov-21	2022-2023 Proposed Operating Budget Jun-22	\$ Variance	% Variance
Ordinary Income/Expense				
Income				
8000 · LCFF, EPA, In Lieu, Prop tax	7,389,647	8,475,689	1,086,042	14.7%
8100 · Federal Revenue	1,125,113	1,051,157	-73,956	-6.6%
8500 · Other State Revenues	925,768	836,070	-89,698	-9.7%
8600 · Other Local Revenue	270,000	435,000	165,000	61.1%
8700 · SpEd Apportionment	463,040	630,009	166,969	36.1%
Total Income	10,173,567	11,427,925	1,254,358	12.3%
Gross Income	10,173,567	11,427,925	1,254,358	12.3%
Expense				
1000 · Certificated Salaries	3,827,292	4,084,540	257,248	6.7%
2000 · Classified Salaries	2,351,476	2,324,353	-27,123	-1.2%
3000 · Employee Benefits	1,787,678	1,853,849	66,171	3.7%
4000 · Books & Supplies	962,630	957,850	-4,780	-0.5%
5000 · Services & Other Operating Exp	1,365,124	1,556,273	191,148	14.0%
6000 · Capital Outlay	60,700	55,000	-5,700	-9.4%
7000 · All Other Financing Uses	262,379	252,480	-9,899	-3.8%
Total Expense	10,617,280	11,084,345	467,065	4.4%
Net Ordinary Income	-443,713	343,580	787,293	-177.4%
	-4.36%	3.01%		

Reserved Funds*

IPIG	\$	100,000.00
ESSER III	\$	91,000.00
EEF	\$	67,000.00
ELOP	\$	172,586.00
SELPA Fed	\$	24,975.00
SELPA	\$	54,904.00
LCAP Carryover	\$	54,335.00
Total Income	\$	564,800.00
Net Ordinary Income	\$	908,380.36
Percentage		7.9%

*Restricted funds received in prior years reserved for use in 22/23.

Great Valley Academy-Modesto Campus
Budget Comparison-Narrative
Jun-22

Revenue

8000 - Revenue figures updated with most recent LCFF 23.1b calculations - Includes ADA reduction and 7% COLA
8100 - ESSER III funds to be spent and SELPA Federal to be used from restricted reserve funds received in 21/22
8500 - Restricted reserve funds to be used for ED EFF, SELPA and LCAP Carryover
8600/8700 - Increased revenue for SpEd apportionment

Net increase in revenue \$1,254,358 (12.3%)

Expenses

Salaries and benefit expenses include:

COLA increases and movement to credentialed scale plus summer school salary expense
and all allocations for multi-campus staff salaries/benefits
Employee benefits include STRS increase to 19.1%
Salaries and benefits represent 74.5% of total expenses

Books and Supplies expenses include:

general curriculum increases and homeschool \$50K
teacher/classroom/office/medical/custodial/maintenance supplies
furniture/computers/equipment
ELO, IPI, ESSER III and Title I expenses

Services and other expense estimates include:

increased professional development
new teacher induction
audit/legal/insurance/SpEd subcontracts/nursing
authorizer oversight fees
ELO, IPI, ESSER III, Title I, and SELPA expenses
ongoing mental health services

Capital Outlay

\$55K for miscellaneous projects
** at year end, capital outlay amounts will be reclassified as a construction/fixed asset
thereby providing an increase to "income"/increase in fund reserve

Other Tuition, Exc costs, Deficit

22/23 represents estimated SELPA calculation from section C.2.d

All other financing uses

Includes mortgage payment including principal and interest
** at year end, principal amounts will be reclassified as a reduction to liabilities
thereby providing an increase to "income"/increase in fund reserve

"Income"/increase in fund reserve amount

\$343,580 Net Ordinary Income

\$908,380 Net Ordinary Income with Restricted Reserve Funds

2022-2023
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	5,092,382.68	5,159,005.42	5,591,395.15	5,544,078.68	5,373,951.50	6,032,705.20	6,087,784.52	5,946,046.84	6,345,100.93	6,265,498.38	6,200,485.72		
LCFF Revenue	8011	0.00	226,817.75	408,271.95	408,271.95	408,271.95	408,271.95	408,271.95	453,635.50	453,635.50	453,635.50	453,635.50	453,635.50	0.00	4,536,355.00
EPA Funding	8012		0.00	534,166.75		534,166.75		534,166.75		534,166.75		534,166.75		0.00	2,136,667.00
In-Lieu of Taxes Charter Funding	8096		99,375.24	198,750.48	132,500.32	132,500.32	132,500.32	132,500.32	132,500.32	139,125.34	139,125.34	139,125.34	139,125.34	139,125.34	1,656,254.00
Selpa Prop Tax	8097							73,206.50						73,206.50	146,413.00
Federal IDEA	8181													107,620.00	107,620.00
Federal Food	8220		0.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	29,167.00	58,330.00	350,000.00
Title 1, Part A	8290													117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			115,000.00				115,000.00				115,000.00		130,832.00	475,832.00
State Food Revenue	8520		0.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	5,000.00	30,000.00
Educator Effectiveness	8550													0.00	
Mandated Block Grant	8550							434,714.13						0.00	434,714.13
Lottery	8560							62,000.00			30,000.00			35,441.55	127,441.55
Lottery, prop 20	8561										25,410.12			0.00	50,820.25
In Person Inst Grant 7422	8590												25,410.13	0.00	
Expanded Lrng Opp Grant 7425	8590													0.00	
Exp Lrng Opp Program	8590		8,629.30	15,532.74	15,532.74	15,532.74	15,532.74	15,532.74	17,258.60	17,258.60	17,258.60	17,258.60	17,258.60	0.00	172,586.00
Other	8590													20,508.00	20,508.00
Prior Year Payments	prior year													0.00	
Uniform Sales	8638	15,000.00	25,000.00	10,000.00	5,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	28,000.00	99,000.00
Other Local (Kids Care)	8689	13,000.00	18,000.00	25,000.00	25,000.00	25,000.00	15,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	14,000.00	285,000.00
Other Local (Fundraiser +)	8600-8699	300.00	300.00	300.00	40,000.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,300.00	1,300.00	1,500.00	0.00	51,000.00
Selpa	8792		31,500.45	56,700.81	56,700.81	56,700.81	56,700.81	56,700.81	63,000.90	63,000.90	63,000.90	63,000.90	63,000.90	0.00	630,009.00
TOTAL REVENUES		28,300.00	409,622.74	1,395,389.73	714,672.82	672,872.82	1,631,753.70	923,079.32	726,262.32	1,267,054.09	788,397.46	847,987.34	1,292,764.22	729,768.39	11,427,924.93
EXPENDITURES															
Certificated Salaries	1000-1999	80,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	345,000.00	554,539.68	0.00	4,084,539.68
Classified Salaries	2000-2999	95,000.00	165,000.00	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00	399,353.48	0.00	2,324,353.48
Employee Benefits	3000-3999	40,000.00	140,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	323,848.85	0.00	1,853,848.85
Books & Supplies	4000-4999	75,000.00	100,000.00	110,000.00	90,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	92,850.00	0.00	957,850.00
Services & Other Operating Expenses	5000-5999	70,000.00	50,000.00	270,000.00	70,000.00	70,000.00	200,000.00	95,000.00	95,000.00	95,000.00	95,000.00	140,000.00	306,272.56	0.00	1,556,272.56
Capital Outlay	6000-6999	0.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	0.00	55,000.00
Other Outgo	7100-7499	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	54,480.00	0.00	252,480.00
TOTAL EXPENDITURES		378,000.00	823,000.00	1,083,000.00	863,000.00	843,000.00	973,000.00	868,000.00	868,000.00	868,000.00	868,000.00	913,000.00	1,736,344.57		11,084,344.57
FUND INCREASE/DECREASE		(349,700.00)	(413,377.26)	312,389.73	(148,327.18)	(170,127.18)	658,753.70	55,079.32	(141,737.68)	399,054.09	(79,602.54)	(65,012.66)	(443,580.35)	729,768.39	343,580.36
Reserved Funds used*														510,465.00	564,800.00
BUDGET INCREASE/DECREASE		349,700.00	413,377.26	(312,389.73)	148,327.18	170,127.18	(658,753.70)	(55,079.32)	141,737.68	(399,054.09)	79,602.54	65,012.66	443,580.35	1,240,233.39	908,380.36
Accruals Received		80,000.00	480,000.00	120,000.00	101,010.71										781,010.71
Liabilities															0.00
Line of Credit (1,000,000)															0.00
	0														0.00
ENDING CASH BALANCE		5,092,382.68	5,159,005.42	5,591,395.15	5,544,078.68	5,373,951.50	6,032,705.20	6,087,784.52	5,946,046.84	6,345,100.93	6,265,498.38	6,200,485.72	5,756,905.36		

* Restricted Funds received in prior years reserved for use in 22/23

Salida
Budget Comparison
2021-2022 Approved Budget (November 2021)
2022-2023 Proposed Budget (June 2022)

	2021-2022 Approved Operating Budget Nov-21	2022-2023 Proposed Operating Budget Jun-22	\$ Variance	% Variance
Ordinary Income/Expense				
Income				
8000 · LCFF, EPA, In Lieu, Prop tax	7,166,539	7,971,890	805,351	11.2%
8100 · Federal Revenue	933,703	918,440	-15,263	-1.6%
8500 · Other State Revenues	792,166	776,075	-16,091	-2.0%
8600 · Other Local Revenue	210,000	215,000	5,000	2.4%
8700 · SpEd Apportionment	428,411	684,741	256,330	59.8%
Total Income	9,530,819	10,566,146	1,035,327	10.9%
Gross Income	9,530,819	10,566,146	1,035,327	10.9%
Expense				
1000 · Certificated Salaries	3,651,126	3,846,046	194,919	5.3%
2000 · Classified Salaries	1,872,664	2,047,149	174,485	9.3%
3000 · Employee Benefits	1,631,386	1,804,647	173,261	10.6%
4000 · Books & Supplies	854,095	794,750	-59,345	-6.9%
5000 · Services & Other Operating Exp	1,283,335	1,548,493	265,158	20.7%
6000 · Capital Outlay	98,000	89,500	-8,500	-8.7%
7000 · All Other Financing Uses	393,912	398,744	4,832	1.2%
Total Expense	9,784,518	10,529,329	744,811	7.6%
Net Ordinary Income	-253,699	36,817	290,516	-114.5%
	-2.66%	0.35%		

Reserved Funds*

IPIG	\$	70,000.00
ESSER III	\$	57,109.00
ELOG	\$	40,000.00
EEF	\$	65,000.00
ELOP	\$	144,827.00
SELPA Fed	\$	25,283.00
SELPA	\$	55,582.00
Total Income	\$	457,801.00

Net Ordinary Income \$ **494,618.30**
Percentage **4.7%**

*Restricted funds received in prior years reserved for use in 22/23.

Great Valley Academy-Salida Campus
Budget Comparison-Narrative
Jun-22

Revenue

8000 - Revenue figures updated with most recent LCFF 23.1b calculations - Includes ADA reduction and 7% COLA
8100 - ESSER III funds to be spent and SELPA Federal to be used from restricted reserve funds received in 21/22
8500 - Restricted reserve funds to be used for ELOG, IPIG, ED EFF, and SELPA
8600/8700 - Increased revenue for SpEd apportionment

Net increase in revenue \$1,035,327 (10.9%)

Expenses

Salaries and benefit expenses include:

COLA increases and movement to credentialed scale plus summer school salary expense
and all allocations for multi-campus staff salaries/benefits
Employee benefits include STRS increase to 19.1%
Salaries and benefits represent 73.1% of total expenses

Books and Supplies expenses include:

general curriculum
teacher/classroom/office/medical/custodial/maintenance supplies
furniture/computers/equipment
ELO, IPI, ESSER III and Title I expenses

Services and other expense estimates include:

increased professional development
new teacher induction
audit/legal/insurance/SpEd subcontracts/nursing
authorizer oversight fees
ELO, IPI, ESSER III, Title I, and SELPA expenses
ongoing mental health services

Capital Outlay

\$89K for miscellaneous projects
** at year end, capital outlay amounts will be reclassified as a construction/fixed asset
thereby providing an increase to "income"/increase in fund reserve

Other Tuition, Exc costs, Deficit

22/23 represents estimated SELPA calculation from section C.2.d

All other financing uses

Includes mortgage payment including principal and interest
** at year end, principal amounts will be reclassified as a reduction to liabilities
thereby providing an increase to "income"/increase in fund reserve

"Income"/increase in fund reserve amount

\$36,817 Net Ordinary Income

\$494,618 Net Ordinary Income with Restricted Reserve Funds

2022-2023
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	3,314,740.64	2,823,170.65	2,598,318.83	3,152,865.37	3,278,365.68	3,264,699.64	3,567,438.86	P1 3,746,929.82	3,781,245.09	3,857,785.97	3,948,982.60	4,048,151.97		
LCFF Revenue	8011	0.00	323,428.15	582,170.67	582,170.67	582,170.67	582,170.67	582,170.67	646,856.30	646,856.30	646,856.30	646,856.30	646,856.30	0.00	6,468,563.00
EPA Funding	8012		0.00	37,371.50				37,371.50		37,371.50				0.00	149,486.00
In-Lieu of Taxes Charter Funding	8096		72,811.62	145,623.24	97,082.16	97,082.16	97,082.16	97,082.16	97,082.16	101,936.27	101,936.27	101,936.27	101,936.27	101,936.27	1,213,527.00
Selpa Prop Tax	8097							70,157.00						70,157.00	140,314.00
Federal IDEA	8181													117,664.00	117,664.00
Federal Food	8220		0.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	26,990.00	80,100.00	350,000.00
Title 1, Part A	8290													74,205.00	74,205.00
Fed Covid Funds ESSER II & III	8290			95,000.00				95,000.00				95,000.00		91,571.00	376,571.00
State Food Revenue	8520		0.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	7,000.00	30,000.00
Educator Effectiveness	8550													0.00	0.00
Mandated Block Grant	8550							413,033.76						0.00	413,033.76
Lottery	8560							52,000.00			28,000.00			40,505.90	120,505.90
Lottery, prop 20	8561										24,027.25			24,027.25	48,054.50
In Person Inst Grant 7422	8590												0.00	0.00	0.00
Expanded Lrng Opp Grant 7425	8590													0.00	0.00
Exp Lrng Opp Program	8590		7,241.35	13,034.43	13,034.43	13,034.43	13,034.43	13,034.43	14,482.70	14,482.70	14,482.70	14,482.70	14,482.70	0.00	144,827.00
Other	8590													19,654.00	19,654.00
Prior Year Payments	prior year													0.00	0.00
Other Local (Kids Care)	8689	8,000.00	14,000.00	19,000.00	19,000.00	19,000.00	15,000.00	20,000.00	20,000.00	20,000.00	20,000.00	20,000.00	21,000.00	0.00	215,000.00
Other Local (Fundraiser +)	8600-8699	300.00	300.00	300.00	75,000.00	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00	3,100.00	0.00	100,000.00
Selpa	8792		29,237.05	52,626.69	52,626.69	52,626.69	52,626.69	52,626.69	58,474.10	58,474.10	58,474.10	58,474.10	58,474.10	0.00	584,741.00
TOTAL REVENUES		8,300.00	447,018.17	974,416.53	868,203.95	796,203.95	1,242,609.21	1,014,360.95	869,185.26	911,410.87	926,066.62	969,039.37	912,510.87	626,820.42	10,566,146.16
EXPENDITURES															
Certificated Salaries	1000-1999	60,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	317,000.00	616,045.90	0.00	3,846,045.90
Classified Salaries	2000-2999	65,000.00	135,000.00	168,000.00	168,000.00	168,000.00	168,000.00	168,000.00	168,000.00	168,000.00	168,000.00	168,000.00	335,148.75	0.00	2,047,148.75
Employee Benefits	3000-3999	75,000.00	130,000.00	140,000.00	140,000.00	140,000.00	140,000.00	140,000.00	140,000.00	140,000.00	140,000.00	140,000.00	339,646.95	0.00	1,804,646.95
Books & Supplies	4000-4999	30,000.00	65,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	69,750.00	0.00	794,750.00
Services & Other Operating Expenses	5000-5999	70,000.00	50,000.00	270,000.00	80,000.00	80,000.00	210,000.00	105,000.00	105,000.00	105,000.00	105,000.00	140,000.00	228,493.26	0.00	1,548,493.26
Capital Outlay	6000-6999	0.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	39,500.00	0.00	89,500.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	70,174.11	0.00	398,744.00
TOTAL EXPENDITURES		329,869.99	731,869.99	999,869.99	809,869.99	809,869.99	939,869.99	834,869.99	834,869.99	834,869.99	834,869.99	869,869.99	1,698,758.97		10,529,328.86
FUND INCREASE/DECREASE		(321,569.99)	(284,851.82)	(25,453.46)	58,333.96	(13,666.04)	302,739.22	179,490.96	34,315.27	76,540.88	91,196.63	99,169.38	(786,248.10)	626,820.42	36,817.30
Reserved Funds used*														510,465.00	457,801.00
BUDGET INCREASE/DECREASE		321,569.99	284,851.82	25,453.46	(58,333.96)	13,666.04	(302,739.22)	(179,490.96)	(34,315.27)	(76,540.88)	(91,196.63)	(99,169.38)	786,248.10	1,137,285.42	494,618.30
Accruals Received		30,000.00	60,000.00	580,000.00	67,166.35										737,166.35
Liabilities Accrued (paid)		(200,000.00)													
From Modesto (to Modesto)	0														0.00
ENDING CASH BALANCE		2,823,170.65	2,598,318.83	3,152,865.37	3,278,365.68	3,264,699.64	3,567,438.86	3,746,929.82	3,781,245.09	3,857,785.97	3,948,982.60	4,048,151.97	3,261,903.87		

* Restricted Funds received in prior years reserved for use in 22/23



RESOLUTION NO.: 2017.035 (REVISED 5.19.22)

GREAT VALLEY ACADEMY WELLNESS POLICY

Preamble

Great Valley Academy is committed to the optimal development of every student. Great Valley Academy believes that for students to have the opportunity to achieve personal, academic, developmental, and social success, we need to create positive, safe, and health promoting learning environments at every level, in every setting, throughout the school year.

This policy outlines Great Valley Academy's approach to ensuring supportive environments and opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. Specifically, this policy establishes goals and procedures to ensure that:

- Students at Great Valley Academy have access to healthy foods through the school lunch program in accordance with Federal and State nutrition standards;
- Students receive quality nutrition education that helps them develop lifelong healthy eating behaviors;
- Students have opportunities to be physically active during school;
- Great Valley Academy engages in nutrition and physical activity promotion and other activities that promote student wellness;
- School staff are encouraged and supported to practice healthy nutrition and physical activity behaviors;
- This policy applies to all students, staff, and campuses of Great Valley Academy.

I. School Wellness Committee

Committee Role and Membership

Great Valley Academy will convene a representative wellness committee that collaborates at least four times per year to establish goals for and oversee school health and safety policies and programs, including development, implementation, and periodic review and update of this wellness policy.

To the extent possible, the wellness committee will include representatives from each school campus and reflect the diversity of the community.

Leadership

The Food Services Coordinator will convene the wellness committee and facilitate development of and updates to the wellness policy, and will ensure each school's compliance with the policy.

Name	Title/Relationship to the School or District	Email Address	Role on Committee
Kristen Zuidema	Food Services Coordinator	k.zuidema@greatvalleyacademy.com	Wellness policy coordinator
Michael Ruehle	Modesto Principal	m.ruehle@greatvalleyacademy.com	Responsible for wellness policy implementation and adherence.
Russell Howell	Salida Principal	r.howell@greatvalleyacademy.com	Responsible for wellness policy implementation and adherence.
Marisa Meeks	Chief Operating Officer	m.meeks@greatvalleyacademy.com	Responsible for general oversight of the wellness policy.

II. Wellness Policy Implementation, Monitoring, Accountability, and Community Engagement

Implementation Plan

Great Valley Academy will develop and maintain a plan for implementation to manage and coordinate the execution of this wellness policy. The plan will have specific goals and objectives for nutrition standards for all foods and beverages available on the school campus, food and beverage marketing, nutrition promotion and education, physical activity, physical education, and other school-based activities that promote student wellness. It is recommended that the school complete a school level assessment, create an action plan that fosters implementation, and generate an annual progress report.

This wellness policy and the progress reports can be found at www.greatvalleyacademy.com.

Recordkeeping

Great Valley Academy will retain records to document compliance with the requirements of the wellness policy on log in Food Services Office and/or the central computer network (Google Drive). Documentation maintained in this location will include but will not be limited to:

- The written wellness policy;
- Documentation demonstrating that the policy was made available to the public;

- Documentation of efforts to review and update the Local Schools Wellness Policy; including an indication of who is involved in the update and methods Great Valley Academy uses to make stakeholders aware of their ability to participate on the wellness committee;
- Documentation to demonstrate compliance with the annual public notification requirements;
- The most recent assessment on the implementation of the local school wellness policy;
- Documentation demonstrating the most recent assessment on the implementation of the Local School Wellness Policy has been made available to the public.

Annual Notification of Policy

Great Valley Academy will actively inform families and the public each year of basic information about this policy, including its content, and updates to the policy and implementation status. Great Valley Academy will make this information available via the website. This will include a summary of Great Valley Academy's events or activities related to wellness policy implementation. Annually, Great Valley Academy will also publicize the name and contact information of school officials leading and coordinating the committee, as well as information on how the public can get involved with the school wellness committee.

Triennial Progress Assessments

At least once every three years, Great Valley Academy will evaluate compliance with the wellness policy to assess the implementation of the policy and include:

- The extent to which Great Valley Academy is in compliance with the wellness policy;
- The extent to which Great Valley Academy's wellness policy compares to other Stanislaus County school wellness policies; and

The position/person responsible for managing the triennial assessment and contact information is **Kristen Zuidema**, Food Services Coordinator, k.zuidema@greatvalleyacademy.com. The wellness committee will monitor schools' compliance with this wellness policy. Great Valley Academy will actively notify households/families of the availability of the triennial progress report.

Revisions and Updating the Policy

The wellness committee will update or modify the wellness policy based on the results of the annual progress reports and triennial assessments, and/or as school priorities change; community needs change; wellness goals are met; new health science, information, and technology emerges; and new Federal or State guidance or standards are issued. **The wellness policy will be assessed and updated as indicated at least every three years, following the triennial assessment.**

Community Involvement, Outreach, and Communications

Great Valley Academy is committed to being responsive to community input, which begins with awareness of the wellness policy. Great Valley Academy will actively communicate ways in which representatives of GVA and others can participate in the development, implementation, and periodic review and update of the wellness policy through a variety of means appropriate for the school. Great Valley Academy will ensure that communications are culturally and linguistically appropriate to the

community, and accomplished through means similar to other ways that Great Valley Academy is communicating other important school information with parents.

Great Valley Academy will actively notify the public about the content of or any updates to the wellness policy annually, at a minimum.

III. Nutrition

School Meals

Great Valley Academy is committed to serving healthy meals to children that meet or exceed requirements set forth by the National School Lunch Program (NSLP). The school meal program aims to improve the diet and health of school children, help mitigate childhood obesity, model healthy eating to support the development of lifelong healthy eating patterns, and support healthy choices while accommodating cultural food preferences and special dietary needs.

Great Valley Academy participates in USDA child nutrition programs including NSLP and is committed to offering school meals that:

- Are accessible to all students;
- Are at no-cost to all students;
- Are appealing and attractive to children;
- Are served in clean and pleasant settings;
- Meet or exceed current nutrition requirements established by local, state, and Federal statutes and regulations; (Great Valley Academy offers reimbursable school meals that meet [USDA nutrition standards](#).)
- Provide monthly lunch program menus for ordering via www.mymealtime.com
- Promote healthy food and beverage choices

Students will be allowed at least 20 minutes to eat lunch, counting from the time they have received their meal and are seated. Students are served lunch at a reasonable and appropriate time of day.

- Participation in Federal child nutrition programs will be promoted among students and families to help ensure that families know what programs are available in their children's school.

Staff Qualifications and Professional Development

All food service program coordinator and staff will meet or exceed hiring and annual continuing education/training requirements in the [USDA professional standards for child nutrition professionals](#). These school nutrition personnel will refer to [USDA's Professional Standards for School Nutrition Standards website](#) to search for training that meets their learning needs.

Water

To promote hydration, free, safe, unflavored drinking water will be available to all students throughout the school day and on each school campus. Great Valley Academy will make drinking water available within a proximity of where school meals are served during mealtimes. In addition, students will be allowed to bring and carry (approved) water bottles filled with only water with them throughout the day.

All water sources and containers will be maintained on a regular basis to ensure good hygiene standard such sources and containers may include drinking fountains and hydration stations, and other methods for delivering drinking water.

Competitive Foods and Beverages

Great Valley Academy is committed to ensuring that all foods and beverages available to students on the school campus during the school day support healthy eating. No foods and beverages are sold and served outside of the school meal programs (i.e., “competitive” foods and beverages) during the school day. This provides an environment that reinforces the development of healthy eating habits.

Celebrations and Rewards

Generally, foods offered on the school campus will target to meet or exceed the USDA Smart Snacks in School nutrition standards including through:

1. Celebrations and parties. Great Valley Academy will provide a recommended list of healthy party ideas to parents and teachers, including non-food celebration ideas. Healthy party ideas from the [Alliance for a Healthier Generation](#) and from the [USDA](#).
2. Classroom snacks brought by parents. Great Valley Academy will provide to parents a [list of foods and beverages that meet Smart Snacks](#) nutrition standards to be used as a recommendation.
3. Rewards and incentives. Great Valley Academy will provide teachers and other relevant school staff a [list of alternative ways to reward children](#) as a recommendation. Foods and beverages should not be used as a reward, or withheld as punishment for any reason, such as behavior.

Fundraising

Great Valley Academy will only use non-food fundraisers during the school day and will encourage promoting physical activities (such as jog-a-thons, family fitness events, fun runs, etc.). Great Valley Academy will make available to parents and teachers a recommended list of healthy fundraising ideas.

Nutrition Promotion

Nutrition promotion and education positively influence lifelong eating behaviors by using evidence-based techniques and nutrition messages, and by creating food environments that encourage healthy nutrition choices and encourage participation in school meal programs. Nutrition promotion may also include marketing and advertising nutritious foods and beverages to students.

Great Valley Academy will promote healthy food and beverage choices for all students throughout the school campuses, as well as encourage participation in school meal programs. This promotion will occur through at least:

- Promoting the school meal program and its benefits to students.
- Posters of healthy food choices placed throughout the campuses.

Nutrition Education

Great Valley Academy aims to teach, model, encourage, and support healthy eating by students. Schools will provide nutrition education and engage in nutrition promotion that:

- Is designed to provide students with the knowledge and skills necessary to promote and protect their health;
- Promote fruits, vegetables, whole-grain products, low-fat and fat-free dairy products as part of daily eating.

Essential Healthy Eating Topics in Health Education

Great Valley Academy will include in the health education curriculum the following essential topics on healthy eating:

- Food guidance from [MyPlate](#)
- Eating a variety of foods every day
- Eating more fruits, vegetables, and whole grain products
- Importance of water consumption
- Resisting peer pressure related to unhealthy dietary behavior

[USDA's Team Nutrition](#) provides free nutrition education and promotion materials, including standards-based nutrition education curricula and lesson plans, posters, interactive games, menu graphics, and more.

Food and Beverage Marketing in Schools

Great Valley Academy is committed to providing a school environment that ensures opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. It is the intent of Great Valley Academy to protect and promote student's health by permitting advertising and marketing for only those foods and beverages that are permitted **to be sold** on the school campus, consistent with Great Valley Academy's wellness policy.

Any foods and beverages marketed or promoted to students on the school campus during the school day will target to meet or exceed the USDA Smart Snacks in School nutrition standards. Food advertising and marketing is defined as an oral, written, or graphic statements made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller, or any other entity with a commercial interest in the product. This term includes, but is not limited to the following:

- Brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container.
- Minimal advertisements in school publications or school mailings.

IV. Physical Activity

Children and adolescents should participate in 60 minutes of physical activity every day. A substantial percentage of students' physical activity can be provided through a comprehensive, school-based physical activity program (CSPAP) that includes these components: physical education, recess, classroom-based physical activity, walk and bicycle to school, and out-of-school time activities and Great Valley Academy is committed to providing these opportunities. Great Valley Academy will ensure that

these varied opportunities are in addition to, and not as a substitute for, physical education (addressed in “Physical Education” subsection).

Physical activity during the school day (including but not limited to recess, physical activity breaks, or physical education) **will not be withheld** as punishment for any reason. This does not include participation on sports teams that have specific academic requirements.

To the extent practicable, Great Valley Academy will ensure that its grounds and facilities are safe and that equipment is available to students to be active. Great Valley Academy will conduct necessary inspections and repairs.

Physical Education

Great Valley Academy will provide students with physical education, using an age-appropriate, sequential physical education curriculum consistent with national and state standards for physical education. The physical education curriculum will promote the benefits of a physically active lifestyle and will help students develop skills to engage in lifelong healthy habits, as well as incorporate essential health education concepts (discussed in the “*Essential Physical Activity Topics in Health Education*” subsection).

All students will be provided equal opportunity to participate in physical education classes. Great Valley Academy will make appropriate accommodations to allow for equitable participation for all students and will adapt physical education classes and equipment as necessary.

All Great Valley Academy students will receive physical education weekly. The following identifies grade span specific requirements:

- Kindergarten will receive time daily to be physically active.
- 1st – 8th grades include not less than 200 minutes in every 10 school days for physical education.

Essential Physical Activity Topics in Health Education

Great Valley Academy will include in the health education curriculum the following essential topics on physical activity

The physical, psychological, or social benefits of physical activity:

- How physical activity can contribute to a healthy weight
- Health-related fitness, that is, cardiovascular endurance, muscular endurance, muscular strength, flexibility, and body composition
- Phases of an exercise session, that is, warm up, workout, and cool down
- Decreasing sedentary activities, such as TV watching

Recess

Great Valley Academy will offer at least **20 minutes of recess** on all or most days during the school year. If recess is offered before lunch, schools will have appropriate hand-washing facilities and/or hand-sanitizing mechanisms located just inside/outside the classroom to ensure proper hygiene prior to eating and students are encouraged to use these mechanisms before eating.

Outdoor recess will be offered when weather is feasible for outdoor play. In the event that the school must conduct **indoor recess**, teachers and staff will follow the indoor recess guidelines that promote physical activity for students, to the extent practicable. Recess will complement, not substitute, physical education class. Recess monitors or teachers will encourage students to be active, and will serve as role models by being physically active alongside the students whenever feasible.

Classroom Physical Activity Breaks (Elementary and Secondary)

Great Valley Academy recognizes that students are more attentive and ready to learn if provided with periodic breaks when they can be physically active or stretch. Thus, students will be offered periodic opportunities to be active or to stretch during classroom time. Great Valley Academy recommends teachers provide short (3-5 minute) physical activity breaks to students during and between classroom time. These physical activity breaks will complement, not substitute, for physical education class, recess, and class transition periods.

Active Academics

Great Valley Academy will support classroom teachers incorporating physical activity and employing kinesthetic learning approaches into core subjects by providing annual professional development opportunities and resources, including information on leading activities, activity options, as well as making available background material on the connections between learning and movement.

Teachers will serve as role models by being physically active alongside the students whenever feasible.

Before and After School Activities

Great Valley Academy offers opportunities for students to participate in physical activity either before and/or after the school day (or both) through a variety of methods. Great Valley Academy will encourage students to be physically active before and after school by offering after school activities, athletics and extended care.

V. Other Activities that Promote Student Wellness

Great Valley Academy will integrate wellness activities across the entire school setting. Great Valley Academy will coordinate and integrate other initiatives related to physical activity, physical education, nutrition and other wellness components so all efforts are complementary, not duplicative, and work towards the same set of goals and objectives promoting student well-being, optimal development and strong educational outcomes.

All school-sponsored wellness events will adhere to the wellness policy guidelines. All school-sponsored wellness events will include physical activity and healthy eating opportunities when appropriate.

Community Partnerships

Great Valley Academy will build relationships with community partners (e.g., hospitals, universities/colleges, local businesses, fitness facilities, etc.) in support of this wellness policy's implementation. Existing and new community partnerships and sponsorships will be evaluated to ensure that they are consistent with the wellness policy and its goals.

Community Health Promotion and Family Engagement

Great Valley Academy will promote to parents/caregivers, families, and the general community the benefits of and approaches for healthy eating and physical activity throughout the school year. Families will be informed and invited to participate in school-sponsored activities and will receive information about health promotion efforts.

As described in the “Community Involvement, Outreach, and Communications” subsection, GVA will use electronic mechanisms (e.g., email or displaying notices on the school’s website), as well as non-electronic mechanisms, (e.g., newsletters, presentations to parents or sending information home to parents), to ensure that all families are actively notified of opportunities to participate in school-sponsored activities and receive information about health promotion efforts.

Staff Wellness and Health Promotion

The wellness committee will strive to identify and disseminate wellness resources and performs other functions that support staff wellness in coordination with human resources staff.

When feasible, Great Valley Academy will provide available food options that optimize healthy food options with a variety of choices and selections of healthy foods for a variety of dietary needs at employee events.

Professional Learning

When feasible, Great Valley Academy will offer annual professional learning opportunities and resources for staff to increase knowledge and skills about promoting healthy behaviors in the classroom and school (e.g., increasing the use of kinesthetic teaching approaches or incorporating nutrition lessons into math class).

Civil Rights

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotope, American Sign Language), should contact the responsible state or local agency that administers the program or USDA’s TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant’s name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant

Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:**
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or
2. **fax:**
(833) 256-1665 or (202) 690-7442; or
3. **email:** program.intake@usda.gov

This institution is an equal opportunity provider.

Date Approved: June 23, 2022

Signature, President or Secretary

Board Action:

AYES:

NAYS:

ABSENT:

ABSTAIN:

**GREAT VALLEY ACADEMY
FORMAL RECORD OF ACTION**

The following is a formal record of action taken by the governing body of GREAT VALLEY ACADEMY (the "Employer").

With respect to the amendment and restatement of the GREAT VALLEY ACADEMY 401(K) PLAN AND TRUST (the "Plan"), the following resolutions are hereby adopted:

RESOLVED: That the Plan be amended and restated effective July 01, 2021, in the form attached hereto, which Plan is hereby adopted and approved;

RESOLVED FURTHER: That the appropriate officers of the Employer be, and they hereby are, authorized and directed to execute the Plan on behalf of the Employer;

RESOLVED FURTHER: That the Governing Board of Great Valley Academy is hereby retained as the Trustee of the Plan; and

RESOLVED FURTHER: That the officers of the Employer be, and they hereby are, authorized and directed to take any and all actions and execute and deliver such documents as they may deem necessary, appropriate or convenient to effect the foregoing resolutions including, without limitation, causing to be prepared and filed such reports documents or other information as may be required under applicable law.

Dated this _____ day of _____, 2022.

**GREAT VALLEY ACADEMY
401(K) PLAN AND TRUST**

Prepared by:



**GREAT VALLEY ACADEMY
401(K) PLAN AND TRUST**

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ADOPTION AGREEMENT #001
401(k)/PROFIT SHARING NON-STANDARDIZED PLAN

The undersigned adopting employer hereby adopts this Plan. The Plan is intended to qualify as a tax-exempt profit sharing plan under Code section 401(a), and the cash or deferred arrangement forming part of the Plan (to the extent provided in the Adoption Agreement) is intended to qualify under Code section 401(k). The Plan shall consist of this Adoption Agreement, its related Basic Plan Document #01, and any Addendum to the Adoption Agreement. Unless otherwise indicated, all Section references are to Sections in the Basic Plan Document.

EMPLOYER INFORMATION

NOTE: An amendment is not required to change the responses in items 1-13 below.

1. Name of adopting employer (Plan Sponsor): GREAT VALLEY ACADEMY
2. Address: 3200 TULLY RD
3. City: MODESTO
4. State: CA
5. Zip: 95350
6. Phone number: 209-576-2283
7. Fax number: 209-576-2838
8. Plan Sponsor EIN: 61-1506412
9. Plan Sponsor fiscal year end: June 30

10. Entity Type

- a. Plan Sponsor entity type:
 - i. ☐ C Corporation
 - ii. ☐ S Corporation
 - iii. ☐ Non-Profit Organization
 - iv. ☐ Partnership
 - v. ☐ Limited Liability Company (taxed as: _____)
 - vi. ☐ Limited Liability Partnership
 - vii. ☐ Sole Proprietorship
 - viii. ☐ Electing Church (ERISA section 3(33))
 - ix. ☒ Other: IRC 501(c) 3 Corporation (must be a legal entity recognized under the Code)

11. State or commonwealth of organization of Plan Sponsor: California

12. Affiliated Service Groups

- ☐ The Plan Sponsor is a member of an affiliated service group. List all members of the group (other than the Plan Sponsor):

NOTE: Affiliated service group members must adopt the Plan with the approval of the Plan Sponsor to participate.

NOTE: Listing affiliated service group members is for information purposes only and is optional.

13. Controlled Groups

- ☒ The Plan Sponsor is a member of a controlled group. List all members of the group (other than the Plan Sponsor): SMART SCHOOLS OF CALIFORNIA, INC.

NOTE: Controlled group members must adopt the Plan with the approval of the Plan Sponsor to participate.

NOTE: Listing controlled group members is for information purposes only and is optional.

PLAN INFORMATION

SECTION A. GENERAL INFORMATION

Plan Name/Effective Date

1. Plan Number: 001

2. Plan name:

a. GREAT VALLEY ACADEMYb. 401(K) PLAN AND TRUST

3. Effective Date

a. Original effective date of Plan: July 01, 2011b. ☒ This is a restatement of a previously-adopted plan. Effective date of Plan restatement: July 01, 2021*NOTE: The dates specified above in A.3a or A.3b may not be earlier than the first day of the Plan Year during which the Plan is adopted or amended and restated by the Plan Sponsor.*

4. Merger Information

a. Other Plan name: _____

b. Merger effective date: _____

c. Additional merger information: _____

5. Plan Year

a. Plan Year means each consecutive 12-month period ending on June 30 (e.g., December 31)b. ☐ The Plan has a Short Plan Year. The Short Plan Year begins _____ and ends _____

i. In the event of a Short Plan Year, service conditions will be pro-rated based on months for the following purposes:

☐ None☐ All purposes (i.e., eligibility, allocation conditions, and vesting)☐ Other: _____*NOTE: The provisions of A.5b apply only in the event of an initial Plan Year. A Short Plan Year for reasons other than the initial Plan Year requires a Plan amendment.*

6. Limitation Year means:

a. ☒ Plan Yearb. ☐ calendar yearc. ☐ tax year of the Plan Sponsord. ☐ Other: _____*NOTE: If "Other" is selected, the limitation year must be a consecutive 12-month period.*

7. Frozen Plan

a. ☐ The Plan is frozen as to eligibility effective: _____b. ☐ The Plan is frozen as to benefit accruals effective: _____

Plan Features

8. Elective Deferrals

a. Elective Deferrals are permitted (Section 4.01):

☒ Yes ☐ No

b. Roth Elective Deferrals are permitted:

☒ Yes ☐ No*NOTE: If "No" is selected in A.8a, no Elective Deferrals, Voluntary Contributions, Employer Matching Contributions or 401(k) safe harbor contributions shall be permitted - A.8b, A.9, A.10, A.12, and A.13 shall be deemed to be "No".*

9. Voluntary Contributions

Voluntary (after-tax) Contributions are permitted (Section 4.01):

- a. ☐ Yes
 b. ☒ No
 c. ☐ Formerly Allowed

NOTE: If "No", questions regarding Voluntary Contributions are disregarded.

NOTE: A.9 must be "Yes" if the Plan intends to use recharacterization (Section 5.04(a)(3)).

10. Employer Matching Contributions

Employer Matching Contributions are permitted (Section 4.02):

- ☒ Yes ☐ No

NOTE: If "No", questions regarding Employer Matching Contributions are disregarded.

11. Non-Elective Contributions

Non-Elective Contributions are permitted (Section 4.03):

- ☒ Yes ☐ No

NOTE: If "No", questions regarding Non-Elective Contributions are disregarded.

12. Safe Harbor Contributions

Safe harbor contributions are permitted (Section 4.04):

- ☐ Yes ☒ No

NOTE: If "No", questions regarding safe harbor contributions are disregarded.

13. SIMPLE 401(k)

- ☐ The Plan is intended to be a SIMPLE 401(k) Plan (Section 4.11). For purposes of Section 4.11(c)(2)(B) (non-elective contribution of 2 percent of compensation), provide the amount of compensation, as defined in Section 4.11(b)(1), to be eligible for SIMPLE 401(k) Plan (cannot be greater than \$5,000): _____

14. Plan Features Effective Dates

- a. ☐ There is a special effective date for one or more features specified in A.8 through A.13. The special effective date(s) which occur after the Effective Date specified in A.3 is/are: _____
- b. ☐ A previous plan amendment eliminated one or more of the features specified in A.8 through A.13. Specify any provisions that apply to the eliminated Plan features: _____

NOTE: The effective date for Elective Deferrals in A.14a cannot be earlier than the date the cash or deferred arrangement was adopted.

Compensation

15. Statutory Compensation

- a. Definition of Statutory Compensation (as defined in Article 2 of the Basic Plan Document):
- ☐ Section 415 Compensation
 - ☒ W-2 Compensation
 - ☐ Withholding Compensation
 - ☐ Section 415 Safe Harbor Option
- b. ☐ Include deemed Code section 125 compensation in definition of Statutory Compensation.
- c. ☐ Include Post Severance Compensation in definition of Statutory Compensation.
- d. ☐ Include Post Year End Compensation in definition of Statutory Compensation.

16. Plan Compensation

- a. Definition of Plan Compensation (as defined in Article 2 of the Basic Plan Document) for purposes of allocations will be Statutory Compensation with the following exclusions:

	Elective Deferrals/ Voluntary Contributions	Employer Match	Non-Elective
i. No Exclusions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ii. Pay earned before participation	n/a	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
iii. Amounts which are contributed by the	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Employer pursuant to a salary reduction agreement and not includible in the gross income of the Participant under Code sections 125, 402(e)(3), 402(h), 403(b), 132(f) or 457
- | | | | | |
|-------|---|--------------------------|--------------------------|--------------------------|
| iv. | All of the following benefits (even if includable in gross income): reimbursements or other expense allowances, fringe benefits (cash and noncash), moving expenses, deferred compensation, and welfare benefits (Treas. Reg. section 1.414(s)-1(c)(3)) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| v. | Differential military pay as defined in Code section 3401(h)(2) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vi. | Final Paycheck Pay | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vii. | Post Severance Compensation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| viii. | Post Year End Compensation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ix. | Other adjustments (e.g., commissions, bonuses, etc.): _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

NOTE: The definition of Plan Compensation for Elective Deferrals/Voluntary Contributions will apply for purposes of safe harbor contributions. See C.16 to include pay earned before participation for purposes of safe harbor contributions.

NOTE: Except for "Final Paycheck Pay" and "Other adjustments," all of the above exclusions meet the safe harbor definition under Section 414(s) Compensation.

NOTE: If "Other adjustments" is selected, the description must be objectively determinable and may not be specified in a manner that is subject to Employer discretion. The description may not meet the safe harbor definition under Section 414(s) Compensation, resulting in the definition of Plan Compensation failing to qualify for any contribution safe harbors, such as the permitted disparity allocation or safe harbor contributions.

NOTE: See Section 4.01(c) for rules regarding elections for bonuses or other special pay.

b. Plan Compensation is determined over the period specified below ending with or within the Plan Year:

- i. ☒ Plan Year
- ii. ☐ calendar year
- iii. ☐ Plan Sponsor Fiscal Year
- iv. ☐ Limitation Year
- v. ☐ Other 12-month period beginning on: _____ (enter month and day)

Definitions

17. Highly Compensated Employee

- a. ☐ Use top-paid group election in determining Highly Compensated Employees
- b. ☐ Use calendar year beginning with or within the preceding Plan Year in determining Highly Compensated Employees

18. Disability

Definition of Disability

- a. ☐ The Participant is unable to engage in any substantial gainful activity by reason of any medically determinable physical

or mental impairment that can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months. The permanence and degree of such impairment shall be supported by medical evidence.

- b. ☒ Under the Social Security Act. The determination by the Social Security Administration that the Participant is eligible to receive disability benefits under the Social Security Act.
- c. ☐ Inability to engage in comparable occupation. The Participant suffers from a physical or mental impairment that results in his inability to engage in any occupation comparable to that in which the Participant was engaged at the time of his disability. The permanence and degree of such impairment shall be supported by medical evidence.
- d. ☐ Pursuant to other Employer Disability Plan. The Participant is eligible to receive benefits under an Employer-sponsored disability plan.
- e. ☐ Under uniform rules established by the Plan Administrator. The Participant is mentally or physically disabled under a written nondiscriminatory policy.
- f. ☐ Other: _____

NOTE: If "Other" is selected, the definition provided must be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

19. Choice of Law

Name of state or commonwealth for choice of law (Section 13.05): California

SECTION B. ELIGIBILITY

Exclusions

1. The term "Eligible Employee" shall not include (Check items as appropriate):

	Elective Deferrals/ Voluntary Contributions	Employer Match	Non-Elective
a. No Exclusions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Union Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
c. Leased Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
d. Non-Resident Alien	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
e. Other Employees (Section 3.06(a)): <u>Credentialed Employees</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: For safe harbor contributions, the exclusion of classes of employees for "Eligible Employee" shall have the same meaning as for Elective Deferrals.

NOTE: If "Other Employees" is selected, the definition provided must be objectively determinable and may not be based on age or length of service, create an indirect service requirement or be specified in a manner that is subject to Employer discretion.

2. Opt-Out

- ☒ An Employee may irrevocably elect not to participate in Plan pursuant to Treas. Reg. section 1.401(k)-1(a)(3)(v).

Eligibility Service Rules

3. Other Employer Service

- ☒ Count years of service with employers other than the Employer for eligibility purposes. List other employers and indicate for what purposes (e.g., Elective Deferrals, Employer Matching, etc.) the service applies along with any limitations: SMART SCHOOLS OF CALIFORNIA, INC.

4. Break in Service

- a. ☒ Rule of parity. Exclude eligibility service before a period of five (5) consecutive One-Year Breaks in Service/Periods of Severance if an Employee does not have any nonforfeitable right to the Account balance derived from Employer contributions.
- b. ☐ One-year holdout. If an Employee has a One-Year Break in Service/Period of Severance, exclude eligibility service

before such period until the Employee has completed a Year of Eligibility Service after returning to employment with the Employer.

- c. ☐ The following modifications shall be made to the requirements specified in B.4: _____

NOTE: B.4b applies for purposes of eligibility to receive Employer Matching Contributions and Non-Elective Contributions only.

5. Special Participation Date

- a. ☐ Allow immediate participation for all Eligible Employees employed on a specific date. All Eligible Employees employed on _____ shall become eligible to participate in the Plan as of _____

- b. ☐ The Plan provides conditions or limitations on immediate participation: _____

NOTE: Describe the conditions or limitations and indicate for what purposes (e.g., Elective Deferrals, Employer Matching, etc.) the conditions or limitations apply. The conditions/limitations must be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

Eligibility for Plan Participation

6. Age Requirement for Plan Participation

	Elective Deferrals/ Voluntary Contributions	Employer Match	Non-Elective
a. Age Requirement	21	21	21

NOTE: Age 21 maximum; an age 26 maximum will apply for certain educational institution plans (Section 3.06).

7. Service Requirement for Plan Participation

	Elective Deferrals/ Voluntary Contributions	Employer Match	Non-Elective
a. No Minimum Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Completion of one Year of Eligibility Service - Hours of Service necessary for a Year of Eligibility Service (not to exceed 1,000): <u>1000</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
c. Completion of one Year of Eligibility Service - Elapsed Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Completion of _____ Hours of Service (not to exceed 1,000) within a 12-month period. The service requirement shall be deemed met at the time the specified number of Hours of Service are completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Completion of _____ month(s) of service - Elapsed Time (not to exceed 12)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Completion of _____ Hours of Service (not to exceed 1,000) in a _____ month period (not to exceed 12; hours of service failsafe applies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Completion of _____ consecutive month(s) of continuous service (not to exceed 12; hours of service failsafe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | | |
|----|---|--------------------------|--------------------------|--------------------------|
| h. | applies)
Completion of two (2) Years of Eligibility Service - Hours of Service (100% vesting required under Sections E.8 and E.9); Hours of Service necessary for a Year of Eligibility Service (not to exceed 1,000): _____ | n/a | <input type="checkbox"/> | <input type="checkbox"/> |
| i. | Completion of two (2) Years of Eligibility Service - Elapsed Time (100% vesting required under Sections E.8 and E.9) | n/a | <input type="checkbox"/> | <input type="checkbox"/> |
| j. | Other: _____ (hours of service failsafe applies if Elapsed Time is not specified) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| k. | Additional Requirements: _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

NOTE: Service taken into account for purposes of B.7 shall be determined under the terms and conditions specified for determining a Year of Eligibility Service.

NOTE: Hours of service failsafe: if B.7f, B.7g or B.7j is selected and the Plan uses the Hours of Service method, the service requirement under B.7 shall be deemed met no later than the end of an Eligibility Computation Period during which the Eligible Employee completes 1,000 Hours of Service; provided, that the individual is an Eligible Employee on the applicable entry date.

NOTE: If "Other" is selected, the service requirements provided must comply with Code section 410(a), be definitely determinable and may not be specified in a manner that is subject to Employer discretion.

NOTE: Any "Additional Requirements" provided must be objectively determinable and may not be specified in a manner that is subject to Employer discretion. For example, different service requirements for specified job classifications. A plan may not impose an eligibility condition that, on the surface, appears to be unrelated to age or service, but, in reality, is an age or service condition that violates the minimum age or service standards.

I. Months of service (only applies if B.7f or B.7g is selected). If the service requirement is not met in the first consecutive period of months, describe the next service requirement:

- i. ☐ Rolling. Each period shall begin immediately after the preceding period and shall end on or before the first Eligibility Computation Period after which time the Plan will revert to 1,000 Hours of Service in an Eligibility Computation Period.
- ii. ☐ Revert to _____ Hours of Service (not to exceed 1,000) in an Eligibility Computation Period.

NOTE: The Employer has the discretion to apply the rolling periods in either an overlapping or consecutive manner. For example, if a three-month period is used, the overlapping method would look at hours worked from January through March, then February through April, etc. Conversely, a consecutive application would look at January through March, then April through June, etc.

8. Entry Dates for Plan Participation

- | | Elective Deferrals/
Voluntary Contributions | Employer Match | Non-Elective |
|--|--|-------------------------------------|-------------------------------------|
| a. Immediate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. First day of each payroll period | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. First day of the calendar month | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| d. First day of each Plan quarter | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| e. First day of the first month and seventh month of the Plan Year | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| f. First day of the Plan Year | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| g. Other: _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

NOTE: If "First day of the Plan Year" is selected, the maximum age and service requirements are reduced by 1/2 year (i.e., age 20-1/2) unless the employee participates on the entry date nearest the date the employee completes the minimum age and service requirements and the entry date is the first day of the Plan Year.

NOTE: The Plan must provide that an Eligible Employee who has attained age 21 and who has completed one Year of Eligibility Service shall commence participation in the Plan no later than the earlier of: (1) the first day of the first Plan Year beginning after the date on which such Eligible Employee satisfied such requirements; or (2) the date that is 6 months after the date on which he satisfied such requirements.

9. Entry Timing for Plan Participation

An Eligible Employee shall become a Participant on the entry date that is:

	Elective Deferrals/ Voluntary Contributions	Employer Match	Non-Elective
a. Coincident with or next following the date the eligibility requirements are met	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
b. Next following the date the eligibility requirements are met	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Coincident with or immediately preceding the date the eligibility requirements are met	n/a	<input type="checkbox"/>	<input type="checkbox"/>
d. Immediately preceding the date the eligibility requirements are met	n/a	<input type="checkbox"/>	<input type="checkbox"/>
e. Nearest to the date the eligibility requirements are met	n/a	<input type="checkbox"/>	<input type="checkbox"/>

NOTE: If immediate entry (B.8a) is selected, an Eligible Employee shall become a Participant eligible for the applicable contribution source(s) immediately upon meeting the eligibility requirements.

10. Eligibility Service Computation Rules

- a. ☒ Eligibility Computation Period switches to Plan Year.
- b. Select hours equivalency for eligibility purposes:
- i. ☐ None
- An Employee shall be credited with the following service with the Employer:
- ii. ☐ 10 Hours of Service for each day or partial day
 - iii. ☐ 45 Hours of Service for each week or partial week
 - iv. ☐ 95 Hours of Service for each semi-monthly payroll period or partial semi-monthly payroll period
 - v. ☒ 190 Hours of Service for each month or partial month
- c. The hours equivalency shall apply to:
- i. ☐ All Employees
 - ii. ☒ Only Employees for whom hours are not tracked. If the Employer tracks hours for an Employee, Eligibility will be determined based on actual hours worked.
- d. ☐ The following modifications shall be made to the requirements specified in B.10a-c: _____

NOTE: B.10b.ii-v and B.10c will not apply if B.10b.i is selected ("None").

NOTE: The responses to B.10 are used only to the extent that the Plan determines eligibility service by the Hour of Service method and will apply uniformly wherever Hours of Service is elected unless otherwise provided in B.10d.

NOTE: If B.10d is selected, the modifications must be objectively determinable and may not be specified in a manner that is subject to Employer discretion. For example, B.10d could be used to restrict the Accounts where Eligibility Computation Periods switch to the Plan Year.

SECTION C. CONTRIBUTIONS - ELECTIVE DEFERRALS AND SAFE HARBOR

Elective Deferrals

NOTE: If A.8 is "Yes" (Elective Deferrals are permitted), an Eligible Employee who has met the requirements of B.6 through B.8 shall be eligible to make Elective Deferrals to the Plan in the following manner (Section 4.01):

1. Minimum and Maximum Deferral Amounts

Unless otherwise indicated below, there shall be no minimum deferral, and the maximum deferral will be defined by the limitations set forth under Code Section 415.

- a. ☐ The Plan will impose a minimum Elective Deferral of: _____
- b. ☐ The Plan will impose a maximum Elective Deferral of: _____
- c. ☐ Other limitations on Elective Deferrals (specify): _____

NOTE: If C.13a.ii (safe harbor match) or C.13.v (QACA match) is selected, C.1a and C.1b may not be used to limit deferrals by Nonhighly Compensated Employees.

NOTE: If C.13a.ii (safe harbor match) or C.13.v (QACA match) is selected, C.1c may not be used to limit deferrals by Nonhighly Compensated Employees. Further, any limitations provided must be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

2. Modifications of Elective Deferrals

- a. Participants modify/start/stop Elective Deferrals/Voluntary Contribution elections:

- i. ☒ Each pay period
- ii. ☐ Monthly
- iii. ☐ Quarterly
- iv. ☐ Semi Annual
- v. ☐ Annual
- vi. ☐ Pursuant to Plan Administrator procedures (at least once each calendar year)

- b. ☒ Participants may stop an election to contribute at any time.

3. Catch-up Contributions

- ☒ Allow Participants to make Catch-up Contributions (Section 5.01(d))

Automatic Enrollment

- 4. The Plan has Automatic Enrollment provisions intended to satisfy:

- a. ☐ None
- b. ☐ ACA
 - i. ☐ The automatic enrollment provisions shall be set according to a written administrative policy which is timely communicated to Participants so they have an effective opportunity to elect to receive cash or complete an affirmative election deferring a different amount or no amount.
- c. ☒ EACA
- d. ☐ QACA

NOTE: If the plan is intended to satisfy the QACA provisions, the applicable EACA provisions will be made available.

- 5. **Automatic Enrollment Application** Indicate which employees will be subject to the automatic enrollment provisions of the Plan:

- a. ☐ Only Participants whose Plan entry date is on or after: _____
- b. ☐ All Participants without an existing affirmative election (an affirmative election includes an election not to defer into the Plan)
- c. ☒ All Participants without an existing affirmative election or whose affirmative election is less than the automatic enrollment amount
- d. ☐ Other: _____

NOTE: If C.5a is selected and the plan is intended to satisfy the EACA requirements (C.4c is selected), the plan cannot use the extended 6-month period to distribute excess contributions and excess aggregate contributions to correct failed ADP or ACP tests.

NOTE: If C.13a.v (QACA match) or C.13a.vi or C.13a.vii (QACA non-elective) is selected, C.5a may not be selected. Automatic enrollment must apply to all Participants eligible for the safe harbor contribution unless the Participant has an election in place.

NOTE: If C.13a.v (QACA match) or C.13a.vi or C.13a.vii (QACA non-elective) is selected, the rate of Elective Deferral contributions

in effect for an Employee immediately prior to the effective date of the default percentage under the qualified automatic contribution arrangement shall not be reduced.

NOTE: If "Other" is selected, the description must be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

6. Covered Employees - EACA Indicate which employees will be "covered employees" who are subject to the automatic contribution arrangement:

- a. ☒ All Employees who make an affirmative election shall remain covered Employees within the meaning of Treas. Reg. section 1.414(w)-1(e)(3)
- b. ☐ Only Eligible Employees who have not made an Elective Deferral election

NOTE: Covered Employees must receive the notice described in Section 4.01(g)(1).

NOTE: A plan intending to satisfy the EACA requirements must cover all eligible employees (C.6a) to be eligible for the extended 6-month period to distribute excess contributions and excess aggregate contributions to correct failed ADP or ACP tests.

7. Initial Automatic Enrollment Amount (ACA and EACA)

- a. The initial amount of the automatic enrollment (as a percentage of pay): 3%
- b. ☐ The automatic enrollment deferral percentage will increase by _____% according to the schedule in C.9.
i. The maximum automatic enrollment deferral percentage is: _____%
- c. ☐ Delayed automatic enrollment. The traditional automatic enrollment will be deemed elected _____ after the initial satisfaction of the eligibility requirements of Article 3 with respect to Elective Deferrals (and after effective date of the addition of an automatic enrollment feature for current Participants).

NOTE: If C.4c is selected (EACA), the Plan must provide that the initial default contribution is a uniform percentage of Plan Compensation; although, the percentage may vary based on years of service.

NOTE: C.7c may only be used with a plan intending to satisfy the ACA requirements.

8. QACA Safe Harbor Automatic Enrollment Amounts (Section 4.01(g)(2))

- a. Enter the amount of the automatic election for the Initial Period as a percentage of Plan Compensation (between 3 - 10%): _____%
- b. Enter the amount of the election for the first year after the Initial Period as a percentage of Plan Compensation (between 4 - 10%): _____%
- c. Enter the amount of the election for the second year after the Initial Period as a percentage of Plan Compensation (between 5 - 10%): _____%
- d. Enter the amount of the election for the third year after the Initial Period as a percentage of Plan Compensation (between 6 - 10%): _____%
- e. ☐ The amount of the election increases after the third year in the following manner (must be at least 6%): _____

NOTE: C.8 only applies if C.13a.v or C.13a.vi is selected (Qualified Automatic Contribution Arrangement).

9. Application of Increase Provisions

- a. The first deferral rate increase will occur on:
- ☐ The first day of the second Plan Year following the Plan Year during which the initial automatic enrollment became effective.
 - ☐ The first day of the _____ Plan Year following the Plan Year during which the initial automatic enrollment became effective.
 - ☐ Other: _____
- b. Subsequent deferral increases will occur:
- ☐ The first day of each Plan Year
 - ☐ The anniversary of the Participant's initial automatic enrollment
 - ☐ The anniversary of the Participant's date of hire
 - ☐ Other: _____

NOTE: If C.9a.ii is selected and the plan is intended to satisfy the QACA requirements, the plan may not delay the first deferral rate increase beyond the first day of the second Plan Year following the Plan Year during which the initial automatic enrollment became effective.

NOTE: C.9b.iv may not be used with a plan intending to satisfy the EACA or QACA requirements.

NOTE: If the Plan is intended to satisfy the QACA requirements, the provisions of C.8 and C.9 must be used together in such a way that the both the automatic enrollment percentages and the schedule of deferral increases satisfy the minimum requirements.

10. Permissible Withdrawals - EACA/QACA

- ☐ Permissible withdrawals will be allowed provided they are requested within _____ after the first automatic deferral (no fewer than 30 or more than 90 days)

11. Deferral Contribution Source If the Plan provides for automatic enrollment and Roth contributions are allowed, select the default type of automatic contributions:

- a. ☒ Pre-tax. All Elective Deferrals made under Section 4.01(g) shall be designated as Pre-tax Elective Deferrals.
b. ☐ Roth. All Elective Deferrals made under Section 4.01(g) shall be designated as Roth Elective Deferrals.

NOTE: C.11 only applies if A.8b is "Yes" (Roth contributions are allowed in the Plan).

Voluntary Contributions

NOTE: If A.9 is "Yes" (Voluntary Contributions are permitted), an Eligible Employee who has met the requirements of B.6 through B.8 shall be eligible to make Voluntary Contributions to the Plan as follows (Section 4.01):

12. Minimum and Maximum Voluntary Contributions

- a. Minimum Voluntary Contribution: _____
b. Maximum Voluntary Contribution: _____
c. Maximum of total combined Elective Deferral/Voluntary Contribution: _____
d. Other: _____

NOTE: C.12b and C.12c may not be more than 100% of Plan Compensation.

NOTE: If "Other" is selected the requirements provided must be nondiscriminatory, objectively determinable and may not be specified in a manner that is subject to Employer discretion.

Safe Harbor Contributions

13. Safe Harbor Plan

- a. Is this a safe harbor plan exempt from most testing:
- i. ☒ No
 - ii. ☐ Yes - safe harbor match
 - iii. ☐ Yes - non-elective contribution, not less than _____% of Plan Compensation
 - iv. ☐ Yes - non-elective contribution, not less than _____% of Plan Compensation but only if the Plan Sponsor provides a follow-up notice
 - v. ☐ Yes - Qualified Automatic Contribution Arrangement safe harbor match
 - vi. ☐ Yes - Qualified Automatic Contribution Arrangement with a non-elective contribution not less than _____% of Plan Compensation
 - vii. ☐ Yes - Qualified Automatic Contribution Arrangement with a non-elective contribution not less than _____% of Plan Compensation but only if the Plan Sponsor provides a follow-up notice
- b. Indicate the safe harbors the Plan is intended to satisfy:
- i. ☐ ADP (Code section 401(k)(12)) and ACP (Code section 401(m)(11))
 - ii. ☐ ADP (Code section 401(k)(13)) and ACP (Code section 401(m)(12))
 - iii. ☐ ADP (Code section 401(k)(12)) only
 - iv. ☐ ADP (Code section 401(k)(13)) only
- c. ☐ The safe harbor provisions are effective: _____
- d. ☐ Safe harbor contributions will be made to another plan (Section 4.04(d)). Name of other plan to which safe harbor contributions are made: _____

NOTE: If safe harbor non-elective is selected (C.13a.iii, C.13a.iv, C.13a.vi or C.13a.vii), the non-elective contribution amount must be at least 3% of Plan Compensation.

NOTE: If safe harbor non-elective (C.13a.iii or C.13a.vi) is selected, see Section 4.04(a)(1). If non-elective contribution with follow-up notice (C.13a.iv or C.13a.vii) is selected, see 4.04(a)(2).

NOTE: If non-elective contribution with follow-up notice (C.13a.iv or C.13a.vii) is selected and the follow-up notice is not given for an applicable Plan Year, the Plan will not be subject to any of the conditions or limitations that apply to safe harbor contributions and the Plan will be subject to the nondiscrimination requirements of Section 5.02 (Section 4.04(a)(2)).

NOTE: If C.13a.v, C.13a.vi or C.13a.vii is selected (Qualified Automatic Contribution Arrangement (QACA) safe harbor), you must

select C.13b.ii or C.13b.iv; C.13b.i and C.13b.iii may not be selected. If the Plan is not a QACA safe harbor (C.13a.ii or C.13a.iv is selected), you must select C.13b.i or C.13b.iii; C.13b.ii and C.13b.vi may not be selected.

NOTE: If QACA safe harbor (C.13a.v, C.13a.vi or C.13a.vii) is selected, see C.8 for the automatic contribution amounts.

NOTE: If safe harbor match is selected (C.13a.ii or C.13a.v), see C.17 for the formula and Section 4.04(c).

NOTE: If C.13d is selected, see Section 4.04(d) for requirements.

14. Prior Safe Harbor Provisions

- ☐ Plan may contain safe harbor contributions pursuant to prior safe harbor provisions (describe provisions or contribution types): _____

15. ADP/ACP Safe Harbor Eligibility

- a. Exclusions. For purposes of safe harbor contributions, the term "Eligible Employee" shall not include
 - i. ☐ No exclusions
 - ii. ☐ Participants who are Highly Compensated Employees
 - iii. ☐ Participants who are considered both a Key Employee and a Highly Compensated Employee
 - iv. ☐ Other exclusions: _____
- b. ☐ Participants covered by a collective bargaining agreement will share in safe harbor allocations provided retirement benefits were the subject of good faith bargaining.
- c. Eligibility conditions for safe harbor contributions (may require testing in accordance with Section 5.03(g))
 - i. ☐ None.
 - ii. ☐ Safe harbor eligibility conditions follow the conditions established for:
 - A. ☐ Elective Deferrals
 - B. ☐ Employer Match
 - C. ☐ Non-Elective
 - iii. ☐ The following age, service and entry date requirements (must satisfy requirements under Code section 410(a)(1)(A)): _____
 - iv. ☐ Participants who have met the greatest minimum age and service conditions permitted under Code section 410(a)(1)(A) with semi-annual entry dates (first day of the first month and seventh month of the Plan Year)
 - v. ☐ Participants who have met the greatest minimum age and service conditions permitted under Code section 410(a)(1)(A) before the first day of the seventh month of the Plan Year
- d. The Plan imposes allocation requirements for Highly Compensated Employees
 - i. ☐ Require service for Highly Compensated Employees to receive a safe harbor contribution. Hours of Service required in the applicable Plan Year for Highly Compensated Employees to receive a safe harbor contribution (not to exceed 1,000): _____
 - ii. ☐ Require employment on the last day of Plan Year for Highly Compensated Employees to receive a safe harbor contribution
- e. ☐ Employer contributions will be offset by safe harbor contributions

NOTE: Any exclusion selected in C.15a is in addition to the exclusions under B.1. If "No exclusions" is selected, any exclusion in B.1 will still apply to the applicable contribution type.

NOTE: If C.15a.ii is selected, the Employer may still elect to make a discretionary safe harbor contribution to Highly Compensated Employees in a percentage that does not exceed the amount or rate of contribution provided to Nonhighly Compensated Employees.

NOTE: C.15b only applies if the Plan has a safe harbor non-elective (C.13a.iii, C.13a.iv, C.13a.vi or C.13a.vii is selected). If C.15b applies and is not selected, Employees covered under a collective bargaining agreement that bargains in good faith for retirement benefits shall not be eligible to receive safe harbor allocations.

16. ADP/ACP Safe Harbor Compensation

- ☐ Pay earned before participation is included in the definition of Plan Compensation for purposes of safe harbor contributions.

17. Safe Harbor Matching Contribution Formula If C.13a.ii or C.13a.v is selected, the safe harbor matching formula will be:

- a. ☐ Single rate. The Employer will contribute an amount equal to
 - i. _____% of the Participant's Matched Employee Contributions that are not in excess of
 - ii. _____% of the Participant's Plan Compensation
- b. ☐ Two rates. The Employer will contribute an amount equal to

Rate One

- i. _____% of the Participant's Matched Employee Contributions that are not in excess of
- ii. _____% of the Participant's Plan Compensation; plus

Rate Two

- iii. _____% of the amount of the Participant's Matched Employee Contributions that exceed _____% of the Participant's Plan Compensation but that do not exceed
 - iv. _____% of the Participant's Plan Compensation
- c. ☐ Three rates. The Employer will contribute an amount equal to

Rate One

- i. _____% of the Participant's Matched Employee Contributions that are not in excess of
- ii. _____% of the Participant's Plan Compensation; plus

Rate Two

- iii. _____% of the amount of the Participant's Matched Employee Contributions that exceed _____% of the Participant's Plan Compensation but that do not exceed
- iv. _____% of the Participant's Plan Compensation; plus

Rate Three

- v. _____% of the amount of the Participant's Matched Employee Contributions that exceed _____% of the Participant's Plan Compensation but that do not exceed
- vi. _____% of the Participant's Plan Compensation

NOTE: No Highly Compensated Employee can receive a greater rate of safe harbor match than a Nonhighly Compensated Employee at the same rate of Matched Employee Contributions.

NOTE: An Employer Matching Contribution of a Nonhighly Compensated Employee will not be taken into account in satisfying the requirements of Section 5.02 to the extent it is a disproportionate contribution within the meaning of Treas. Reg. section 1.401(m)-2(a)(5).

NOTE: If the Plan is a safe harbor match (C.13a.ii is selected) the formula must be completed so that it at least meets the following minimum formula: the Employer will contribute as a safe harbor match an amount equal to 100% of the Participant's Matched Employee Contributions that are not in excess of 3% of the Participant's Plan Compensation; plus 50% of the amount of the Participant's Matched Employee Contributions that exceed 3% but that do not exceed 5% of the Participant's Plan Compensation. The Employer may also elect a safe harbor match formula where: (i) the aggregate amount of safe harbor match at each rate of Matched Employee Contributions is at least equal to the aggregate amount of safe harbor match which would have been made if the safe harbor match were made under the formula described in the applicable preceding sentences, and (ii) the rate of safe harbor match cannot increase as a Participant's Matched Employee Contributions increase.

NOTE: If C.13a.v (QACA match) is selected, the formula must be completed so that it at least meets the following minimum formula: the Employer will contribute as a QACA match an amount equal to 100% of the Participant's Matched Employee Contributions that are not in excess of 1% of the Participant's Plan Compensation; plus 50% of the amount of the Participant's Matched Employee Contributions that exceed 1% but that do not exceed 6% of the Participant's Plan Compensation. The Employer may also elect a QACA match formula where: (i) the aggregate amount of QACA match at each rate of Matched Employee Contributions is at least equal to the aggregate amount of QACA match which would have been made if the QACA match were made under the formula described in the applicable preceding sentences, and (ii) the rate of QACA match cannot increase as a Participant's Matched Employee Contributions increase.

NOTE: If the Plan is intended to also satisfy the ACP safe harbor of Code section 401(m)(11) or 401(m)(12) (C.13b.i or C.13b.ii is selected): (i) the rate of safe harbor match cannot increase as a Participant's Matched Employee Contributions increase, (ii) safe harbor match cannot be made on Matched Employee Contributions in excess of six percent (6%) of Plan Compensation, and (iii) the amount of Employer Matching Contributions subject to Employer discretion shall not exceed four percent (4%) of Plan Compensation.

NOTE: If the Plan is a safe harbor match (C.13a.ii or C.13a.v is selected) or the Plan is an ACP safe harbor (C.13b.i or C.13b.ii is selected), no Highly Compensated Employee can receive a greater rate of safe harbor match than a Nonhighly Compensated Employee at the same rate of Matched Employee Contributions.

18. Determination Period for Safe Harbor Matching Contributions

- a. The period for determining the amount of an allocation of Safe Harbor Matching Contributions is:
- i. ☐ End of Plan Year
 - ii. ☐ Semi-annually
 - iii. ☐ Quarterly

- iv. ☐ Each calendar month
- v. ☐ Each pay period

NOTE: If the safe harbor match is funded more frequently than the period selected, a true-up contribution will be owed to any Participant who did not receive a safe harbor match based on Matched Employee Contributions or Plan Compensation for the entire period selected.

Testing Elections

19. ADP Testing Elections (Section 5.02(a))

- a. Average Deferral Percentage of Nonhighly Compensated Employees are determined using:
 - i. ☒ Current year
 - ii. ☐ Prior year
- b. If prior year testing is selected, for the first year the Plan is a 401(k) plan, the Nonhighly Compensated Employee percentage:
 - i. ☐ 3%
 - ii. ☐ Current year percentages

NOTE: If the Plan is a 401(k) safe harbor plan, the current year must be used for those Plan Years during which the Plan is subject to the 401(k) safe harbor requirements.

NOTE: C.19b only applies for the first year the Plan is a 401(k) plan. If the Effective Date is after the first year a Plan is a 401(k) plan C.19b can be left blank.

20. ACP Testing Elections (Section 5.02(b))

- a. Average Contribution Percentage of Nonhighly Compensated Employees are determined using:
 - i. ☒ Current year
 - ii. ☐ Prior year
- b. If prior year testing is selected, for the first year the Plan is a 401(m) plan, the Nonhighly Compensated Employee percentage:
 - i. ☐ 3%
 - ii. ☐ Current year percentages

NOTE: If the Plan is a 401(k) safe harbor plan and it is intended to satisfy the ACP safe harbor, the current year must be used for those Plan Years during which the Plan is subject to the 401(k) safe harbor requirements.

NOTE: C.20b only applies for the first year the Plan is a 401(m) plan. If the Effective Date is after the first year a Plan is a 401(m) plan C.20b can be left blank.

SECTION D. CONTRIBUTIONS - EMPLOYER MATCHING, NON-ELECTIVE AND OTHER CONTRIBUTIONS

Employer Matching - Allocation Service

NOTE: If A.10 is "Yes" (Employer Matching Contributions are permitted), an Eligible Employee who has met the requirements of Section B and who has satisfied the following requirements shall be eligible to receive an allocation of Employer Matching Contributions during the applicable Plan Year.

1. Allocation Service Requirements for Employer Matching Contributions

- a. ☐ In order to share in the allocation of Employer Matching Contributions, a Participant is required to complete the following Hours of Service in the applicable period (not to exceed 1,000 hours in a Plan Year or a prorated version thereof):
- b. ☐ In order to share in the allocation of Employer Matching Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period
- c. ☐ In order to share in the allocation of Employer Matching Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period or complete at least _____ Hours of Service in the applicable period (not to exceed 1,000 hours in a Plan Year or a prorated version thereof)
- d. ☒ None

NOTE: If the Plan is intended to be a safe harbor 401(k) plan, any requirements specified in the Employer Matching allocation

service rules to receive an allocation of Employer Matching Contributions will not apply to any safe harbor contribution.

2. Applicable Period

a. The applicable period for determining the satisfaction of service requirements for an allocation of Employer Matching Contributions is:

- i. ☐ Plan Year
- ii. ☐ Plan Quarter
- iii. ☐ Calendar Month
- iv. ☐ Payroll Period
- v. ☐ Other: _____

3. Employer Matching Allocation Service Computation Rules

a. Select hours equivalency:

- i. ☐ None.

An Employee shall be credited with the following service with the Employer:

- ii. ☐ 10 Hours of Service for each day or partial day
- iii. ☐ 45 Hours of Service for each week or partial week
- iv. ☐ 95 Hours of Service for each semi-monthly payroll period or partial semi-monthly payroll period
- v. ☐ 190 Hours of Service for each month or partial month

b. The hours equivalency shall apply to:

- i. ☐ All Employees
- ii. ☐ Only Employees for whom hours are not tracked. If the Employer tracks hours for an Employee, satisfaction of allocation conditions will be determined based on actual hours worked.

NOTE: D.3 is only applicable if D.1a or D.1c is selected.

4. Other Employer Service

☐ Count hours of service with employers other than the Employer for purposes of satisfying the allocation service requirements. List other employer(s) along with any limitations: _____

5. Exceptions to Allocation Service Requirements for Employer Matching Contributions

- a. ☐ A Participant whose employment terminates on the last day of the applicable period is treated as being employed by the Employer on the last day of the applicable period.
- b. Modify Hour of Service requirement or last day requirement for a Participant who terminates employment with the Employer during the applicable period due to:
 - i. ☐ death
 - ii. ☐ Disability
 - iii. ☐ attainment of Normal Retirement Date
 - iv. ☐ attainment of Early Retirement date
- c. Any Hour of Service requirement and last day requirement shall be modified as follows:
 - i. ☐ Waive both the Hour of Service requirement and last day requirement
 - ii. ☐ Waive the Hour of Service requirement only
 - iii. ☐ Waive last day requirement only
- d. ☐ The following other modifications shall be made to the requirements specified in D.1-5c: _____

NOTE: Other modifications must be specified in a manner that is objectively determinable and may not be specified in a manner that is subject to Employer discretion.

6. Coverage Failures for Employer Matching Contributions

Method to fix Employer Matching Contribution Code section 410(b) ratio percentage coverage failures (Section 4.02(d)):

- a. ☐ Corrective amendment under Treasury Regulation section 1.401(a)(4)-(11)(g)
- b. ☒ Add just enough Participants to meet the coverage requirements
- c. ☐ Add all non-excludable Participants

Employer Matching - Formula

7. Matched Employee Contribution Inclusions

- a. Elective Deferrals are included in the definition of Matched Employee Contribution to the extent selected below
 - i. ☒ Include a Participant's Catch-up Contributions in the definition of Matched Employee Contribution

- ii. ☒ Include a Participant's Roth Elective Deferrals in the definition of Matched Employee Contribution
- b. ☐ Include a Participant's Voluntary Contributions in the definition of Matched Employee Contributions

NOTE: Pre-tax Elective Deferrals that are not Catch-up Contributions are always included in the definition of Matched Employee Contribution.

8. Employer Matching Contribution Formula

- a. ☐ A discretionary amount. The amount will be allocated:
- ☐ as a uniform percentage of Matched Employee Contributions.
 - ☐ as a flat dollar amount for each Participant.
 - ☐ based on written instructions provided by the Employer to the Plan Administrator (or Trustee, if applicable) describing (1) how the discretionary Employer Matching Contribution formula will be allocated to Participants (e.g., a uniform percentage of Matched Employee Contributions or a flat dollar amount), (2) the computation period(s) to which the discretionary Employer Matching Contribution formula applies, and (3) if applicable, a description of each business location or business classification subject to separate discretionary Employer Matching Contribution allocation formulas. Such instructions must be provided no later than the date on which the discretionary Employer Matching Contribution is made to the Plan. A summary of these instructions must be communicated to Participants who receive discretionary Employer Matching Contributions. The summary must be communicated to Participants no later than 60 days following the date on which the last discretionary Employer Matching Contribution is made to the Plan for a Plan Year.

- b. ☒ Single rate. The Employer will contribute as an Employer Matching Contribution an amount equal to

- 100% of the Participant's Matched Employee Contributions that are not in excess of
- 4% of the Participant's Plan Compensation

- c. ☐ Two rates. The Employer will contribute as an Employer Matching Contribution an amount equal to

Rate One

- _____ % of the Participant's Matched Employee Contributions that are not in excess of
- _____ % of the Participant's Plan Compensation; plus

Rate Two

- _____ % of the amount of the Participant's Matched Employee Contributions that exceed _____ % of the Participant's Plan Compensation but that do not exceed
- _____ % of the Participant's Plan Compensation

- d. ☐ Three rates. The Employer will contribute as an Employer Matching Contribution an amount equal to

Rate One

- _____ % of the Participant's Matched Employee Contributions that are not in excess of
- _____ % of the Participant's Plan Compensation; plus

Rate Two

- _____ % of the amount of the Participant's Matched Employee Contributions that exceed _____ % of the Participant's Plan Compensation but that do not exceed
- _____ % of the Participant's Plan Compensation; plus

Rate Three

- _____ % of the amount of the Participant's Matched Employee Contributions that exceed _____ % of the Participant's Plan Compensation but that do not exceed
- _____ % of the Participant's Plan Compensation

- e. ☐ Years of service. See D.11 below

- f. ☐ Special schedule. Employer Matching Contributions shall be made according to the following fixed schedule: _____

NOTE: The discretionary formula in D.8a must meet the nondiscrimination requirements regarding benefits, right or features described in Treas. Reg. section 1.401(a)(4)-4.

NOTE: If "Special schedule" is selected, the schedule must describe a formula from the options already available or a combination thereof (e.g., single rate formula applies to Group A; two rate formula applies to Group B), be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

9. Additional Discretionary Employer Matching Contributions

- a. ☐ Permit discretionary Employer Matching Contributions to be made in addition to the contributions described in D.8. The amount will be allocated:
- ☐ as a uniform percentage of Matched Employee Contributions.

- ii. ☐ as a flat dollar amount for each Participant.
- iii. ☐ based on written instructions provided by the Employer to the Plan Administrator (or Trustee, if applicable) describing (1) how the discretionary Employer Matching Contribution formula will be allocated to Participants (e.g., a uniform percentage of Matched Employee Contributions or a flat dollar amount), (2) the computation period(s) to which the discretionary Employer Matching Contribution formula applies, and (3) if applicable, a description of each business location or business classification subject to separate discretionary Employer Matching Contribution allocation formulas. Such instructions must be provided no later than the date on which the discretionary Employer Matching Contribution is made to the Plan. A summary of these instructions must be communicated to Participants who receive discretionary Employer Matching Contributions. The summary must be communicated to Participants no later than 60 days following the date on which the last discretionary Employer Matching Contribution is made to the Plan for a Plan Year.

10. Additional Fixed Employer Matching Contributions

- ☐ Permit fixed Employer Matching Contributions to be made in addition to the contributions described in D.8: _____

NOTE: The formula entered in D.10 must describe a formula from the options already available or a combination thereof (e.g., single rate formula applies to Group A; two rate formula applies to Group B), be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

11. Years of Service

- a. The Employer Matching contribution will be made according to the schedule below:
 - i. _____ Years of service _____% of Matched Employee Contributions
 - ii. _____ Years of service _____% of Matched Employee Contributions
 - iii. _____ Years of service _____% of Matched Employee Contributions
 - iv. _____ Years of service _____% of Matched Employee Contributions
- b. ☐ Only Matched Employee Contributions that are not in excess of _____% of the Participant's Plan Compensation shall be matched.
- c. In determining years of service in this D.11, the following service shall be used:
 - i. ☐ Years of Eligibility Service
 - ii. ☐ Years of Vesting Service
- d. Enter the number of Hours of Service necessary to earn a year of service described in D.11a: _____

NOTE: Each tier of Employer Matching Contributions must satisfy the nondiscriminatory availability of benefits, rights, and features in Treas. Reg. section 1.401(a)(4)-4.

12. Employer Matching Contribution(s) - Limitations

- a. Plan limits Employer Matching Contributions to the following in each Plan Year:
 - i. ☒ Maximum percentage of Plan Compensation that applies to all Participants: 4.00%
 - ii. ☐ Maximum percentage of Plan Compensation that applies to Highly Compensated Employees only: _____%
 - iii. ☐ Maximum dollar amount that applies to all Participants: \$ _____
 - iv. ☐ Maximum dollar amount that applies to Highly Compensated Employees only: \$ _____
 - v. ☐ Other: _____
 - vi. ☐ No Maximum
- b. Apply the dollar limit in D.12:
 - i. ☐ On a Plan Year basis only
 - ii. ☐ Pro rata as of each period specified in D.13a

NOTE: If the Plan is intended to satisfy the ACP safe harbor of Code section 401(m)(11) or 401(m)(12) (C.13b.i or C.13b.ii is selected) and the Plan allows for an additional discretionary Employer Matching Contribution, the amount of Employer Matching Contributions subject to Employer discretion shall not exceed four percent (4%) of Plan Compensation.

NOTE: If "Other" is selected the requirements provided must be nondiscriminatory, objectively determinable and may not be specified in a manner that is subject to Employer discretion.

NOTE: D.12b shall only apply if a maximum dollar amount (D.12a.iii or D.12a.iv) is selected and "End of Plan Year" (D.13a.i) is not selected.

13. Determination Period for Employer Matching Contributions

- a. The period for determining the amount of an allocation of Employer Matching Contributions is:
 - i. ☐ End of Plan Year
 - ii. ☐ Semi-annually

- iii. ☐ Quarterly
- iv. ☐ Each calendar month
- v. ☒ Each pay period

NOTE: The determination period elected in D.13 must be equal to or longer than the applicable period elected in D.2.

NOTE: Discretionary Employer Matching Contributions (if selected) may be allocated at a time other than that selected in D.13.

NOTE: See Section 4.02(b)(1) for rules relating to "true-up" Matching Contributions.

Non-Elective - Allocation Service

NOTE: If A.11 is "Yes" (Non-Elective Contributions are permitted), an Eligible Employee who has met the requirements of Section B and who has satisfied the following requirements shall be eligible to receive an allocation of Non-Elective Contributions during the applicable Plan Year.

14. Continuing Eligibility for Non-Elective Contributions (select one):

- a. ☐ Same as Employer Matching Contributions. An Eligible Employee shall be eligible to receive an allocation of Non-Elective Contributions upon meeting the requirements of D.1 through D.5
- b. ☒ Pursuant to options selected below. An Eligible Employee shall be eligible to receive an allocation of Non-Elective Contributions upon meeting the requirements of D.15 through D.19

15. Allocation Service Requirements for Non-Elective Contributions

- a. ☒ In order to share in the allocation of Non-Elective Contributions, a Participant is required to complete the following Hours of Service in the applicable period (not to exceed 1,000 hours in a Plan Year or a prorated version thereof): 1000
- b. ☒ In order to share in the allocation of Non-Elective Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period
- c. ☐ In order to share in the allocation of Non-Elective Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period or complete at least _____ Hours of Service in the applicable period (not to exceed 1,000 hours in a Plan Year or a prorated version thereof)
- d. ☐ None

16. Applicable Period

- a. The applicable period for determining the satisfaction of service requirements for an allocation of Non-Elective Contributions is:
 - i. ☒ Plan Year
 - ii. ☐ Plan Quarter
 - iii. ☐ Calendar Month
 - iv. ☐ Payroll Period
 - v. ☐ Other: _____

17. Non-Elective Allocation Service Computation Rules

- a. Select hours equivalency:
 - i. ☒ None

An Employee shall be credited with the following service with the Employer:

 - ii. ☐ 10 Hours of Service for each day or partial day
 - iii. ☐ 45 Hours of Service for each week or partial week
 - iv. ☐ 95 Hours of Service for each semi-monthly payroll period or partial semi-monthly payroll period
 - v. ☐ 190 Hours of Service for each month or partial month
- b. The hours equivalency shall apply to:
 - i. ☐ All Employees
 - ii. ☐ Only Employees for whom hours are not tracked. If the Employer tracks hours for an Employee, satisfaction of allocation conditions will be determined based on actual hours worked.

18. Other Employer Service

- ☐ Count hours of service with employers other than the Employer for purposes of satisfying the allocation service requirements. List other employer(s) along with any limitations: _____

19. Exceptions to Allocation Service Requirements for Non-Elective Contributions

- a. ☒ A Participant whose employment terminates on the last day of the applicable period is treated as being employed by the

Employer on the last day of the applicable period.

- b. Modify Hour of Service requirement or last day requirement for a Participant who terminates employment with the Employer during the applicable period due to:
- i. ☒ death
 - ii. ☒ Disability
 - iii. ☒ attainment of Normal Retirement Date
 - iv. ☐ attainment of Early Retirement date
- c. Any Hour of Service requirement and last day requirement shall be modified as follows:
- i. ☒ Waive both the Hour of Service requirement and last day requirement
 - ii. ☐ Waive the Hour of Service requirement only
 - iii. ☐ Waive last day requirement only
- d. ☐ The following other modifications shall be made to the requirements specified in D.14-19c: _____

NOTE: Other modifications must be specified in a manner that is objectively determinable and may not be specified in a manner that is subject to Employer discretion.

20. Coverage Failures for Non-Elective Contributions

Method to fix Non-Elective Contribution Code section 410(b) ratio percentage coverage failures (Section 4.03(d)):

- a. ☐ Corrective amendment under Treasury Regulation section 1.401(a)(4)-(11)(g)
- b. ☒ Add just enough Participants to meet the coverage requirements
- c. ☐ Add all non-excludable Participants

Non-Elective - Formula

21. Amount of Non-Elective Contributions

- a. ☒ Discretionary in an amount as determined by the Employer
- b. ☐ _____ % of total Participant Plan Compensation for the Plan Year
- c. ☐ \$_____ for the Plan Year
- d. ☐ Other amount necessary to fund the allocation provided below: _____

22. Non-Elective allocation formula. The Non-Elective Contribution shall be allocated to eligible Participants who have met the requirements of Section B and D.14 through 17 as follows (Section 4.03):

- a. ☒ Pro rata. In the ratio that each Participant's Plan Compensation bears to the Plan Compensation of all eligible Participants.
- b. ☐ Integrated. See D.23.
- c. ☐ Points. See D.24.
- d. ☐ Fixed Amount. In an amount equal to the total Non-Elective Contribution divided by the number of Participants eligible to share in such contribution.
- e. ☐ Age Weighted. In the ratio that such Participant's points bears to the points of all eligible Participants for such Plan Year. The points awarded to each Participant shall be equal to the product of the Participant's Plan Compensation multiplied by the factor in the Age Weighted Addendum determined using the Participant's age as of the end of the Plan Year.
- f. ☐ New Comparability - Defined Groups. See D.25.
- g. ☐ New Comparability - One Group per Participant. In an amount designated by the Employer to be allocated to each group. For purposes of this D.22g, there shall be one group created for each Participant eligible to receive allocations of Non-Elective Contributions. The contribution shall be allocated to each group in a manner determined by the Employer. The amount allocated to one group need not bear any relationship to amounts allocated to any other group. The Employer shall notify the Plan Administrator or the Trustee in writing of the amount of contributions allocated to each group.
- h. ☐ Other fixed formula: _____

NOTE: If Age Weighted (D.22e) or New Comparability (D.22f or D.22g) is selected, see Section 4.03(b)(1) for rules regarding the gateway test.

NOTE: If "Other fixed formula" is selected, it must describe a formula from the options already available or a combination thereof (e.g., pro rata formula applies to Group A; fixed amount applies to Group B), be objectively determinable and may not be specified in a manner that is subject to Employer discretion.

23. Non-Elective - Integration

If D.22b is selected, the Non-Elective Contribution shall be allocated to eligible Participants who have met the requirements of Sections B.6 - B.8 and D.14 pursuant to either Paragraph (1) or (2) below (Section 4.03(b)(3)):

- (1) 2-step method for plans that are not Top-Heavy or who have met the Top-Heavy minimum allocation requirements using other allocations:
 - (A) Non-Elective Contributions shall first be allocated to each Participant's Non-Elective Contribution Account in the ratio that the sum of such Participant's Plan Compensation plus his Excess Compensation bears to the sum of all eligible Participants' Plan Compensation plus Excess Compensation, but not to exceed the permitted disparity of such sum; and
 - (B) The balance, if any, remaining after the allocation in subparagraph (A) shall then be allocated to each Participant's Non-Elective Contribution Account in the ratio that such Participant's Plan Compensation bears to all eligible Participants' Plan Compensation.
- (2) 4-step method for plans that are meeting the Top-Heavy minimum allocation requirements using Non-Elective Contributions:
 - (A) Non-Elective Contributions shall first be allocated to each Participant's Non-Elective Contribution Account in the ratio that each Participant's Statutory Compensation bears to all eligible Participants' Statutory Compensation, but not in excess of 3% of each Participant's Statutory Compensation.
 - (B) The balance, if any, remaining after the allocation in subparagraph (A) shall then be allocated to each Participant's Non-Elective Contribution Account in the ratio that each Participant's Excess Compensation bears to the Excess Compensation of all Participants, but not in excess of 3% of each Participant's Excess Compensation.
 - (C) The balance, if any, remaining after the allocation in subparagraph (B) shall then be allocated to each Participant's Non-Elective Contribution Account in the ratio that the sum of each Participant's Plan Compensation and Excess Compensation bears to the sum of all eligible Participants' Plan Compensation and Excess Compensation, but not in excess of the permitted disparity less 3%.
 - (D) The balance, if any, remaining after the allocation in subparagraph (C) shall be allocated to each Participant's Non-Elective Contribution Account in the ratio that each Participant's Plan Compensation bears to all Participants' Plan Compensation.
- (3) ☐ 2-step method will be used for plans that are meeting the Top-Heavy minimum allocation requirements using Non-Elective Contributions

Integration level for determining Excess Compensation:

- a. ☐ Taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year
- b. ☐ 20% of the taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year; minus \$1.00
- c. ☐ 80% of the taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year; minus \$1.00
- d. ☐ 80% of the taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year; plus \$1.00
- e. ☐ _____% (not more than 100%) of the taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year
- f. ☐ Fixed dollar amount: \$ _____ (not more than the taxable wage base (as defined under Section 230 of the Social Security Act) in effect on the first day of such Plan Year)

NOTE: If D.23a (taxable wage base) is not selected, the amount of permitted disparity will be determined in accordance with the following table:

Integration Level	Permitted Disparity
More than \$0 but not more than 20% of the TWB	5.7%
More than 20% of the TWB but not greater than 80% of the TWB	4.3%
More than 80% of the TWB but less than 100% of the TWB	5.4%
100% of the TWB	5.7%
TWB = taxable wage base (as defined under Section 230 of the Social Security Act)	

24. Non-Elective - Points

If D.22c is selected, the Non-Elective Contribution shall be allocated to eligible Participants who have met the requirements of B.6 through B.8 and D.14 through D.19 in the ratio that such Participant's points bears to the points of all eligible Participants.

Each Participant shall receive to the extent provided in D.24a: (a) the points described in D.24d for each year of age he has attained (as of his birthday during such Plan Year), (b) the points described in D.24c for each Plan Year, including the current Plan Year, during which he was eligible to participate in the Plan after meeting the requirements of Article 3 (regardless of any service or last day requirement in Article 4) applicable to Non-Elective Contributions, and (c) the points described in D.24b for each \$_____ of Plan Compensation he has earned for such Plan Year.

If after application of the foregoing, the average of the allocation rates for eligible Highly Compensated Employees exceeds the average of the allocation rates for eligible Nonhighly Compensated Employees, each eligible Nonhighly Compensated Employee who has earned any points during the Plan Year shall be awarded the same minimum number of points (or fraction of a point) so that the average of the allocation rates for eligible Highly Compensated Employees does not exceed the average of the allocation rates for eligible Nonhighly Compensated Employees.

a. Points will be computed on basis of:

- i. ☐ Age, Service and Plan Compensation
- ii. ☐ Age and Service
- iii. ☐ Age and Plan Compensation
- iv. ☐ Service and Plan Compensation
- v. ☐ Age Only
- vi. ☐ Service Only

b. Points awarded for \$_____ of Plan Compensation: _____

c. Points awarded for each year of service within the meaning of Treas. Reg. section 1.401(a)(4)-11(d)(3): _____

d. Points awarded for each year of age: _____

25. Non-Elective - New Comparability

New Comparability - Defined Groups. If D.22f is selected, the Non-Elective Contribution shall be allocated to eligible

Participants who have met the requirements of B.6 through B.8 and D.14 through D.19 in an amount designated by the Employer to be allocated to each group described in this section. The contribution for a group shall then be further allocated to the members of such group who are eligible to receive allocations of Non-Elective Contributions in the method as specified in this section for such group. The amount allocated to one group need not bear any relationship to amounts allocated to any other group. In the event that an eligible Participant is included in more than one group, the Participant's share of the contribution allocated to each group will be based upon either the amount of service or the Plan Compensation for the part of the year the Participant was in the group.

The groups and allocations shall be determined as follows:

a. Group One: _____ An amount equal to:

- i. ☐ A percentage of Plan Compensation
- ii. ☐ A fixed dollar amount
- iii. ☐ the greater of i. or ii.

NOTE: Groups must be clearly defined in a manner that will not violate the definite predetermined allocation formula requirement of Treas. Reg. section 1.401-1(b)(1)(ii) and the groups cannot be designed in such a manner to where the only NHCE's participating are those NHCE's with the lowest amounts of compensation or the shortest periods of service and who may represent the minimum number of these employees necessary to satisfy coverage under Code section 410(b). In the case of self-employed individuals (i.e., sole proprietorships or partnerships), the requirements of Treas. Reg. section 1.401(k)-1(a)(6) continue to apply and the allocation method should not be such that a cash or deferred election is created for a self-employed individual as a result of application of the allocation method. The Employer shall notify the Plan Administrator or the Trustee in writing of the amount of contributions allocated to each group.

26. Determination Period for Non-Elective Contributions

a. The period for determining the amount of an allocation of Non-Elective Contributions is:

- i. ☒ End of Plan Year
- ii. ☐ Semi-annually
- iii. ☐ Quarterly
- iv. ☐ Each calendar month
- v. ☐ Each pay period
- vi. ☐ At such times as may be determined by the Employer

b. Minimum and Maximum Non-Elective Allocations

- i. ☐ Allocations of Non-Elective Contributions for a Participant shall be subject to a minimum amount: _____
- ii. ☐ Allocations of Non-Elective Contributions for a Participant shall be subject to a maximum amount: _____

NOTE: The determination period elected in D.26 must be equal to or longer than the applicable period elected in D.16.

27. Non-Elective - Disability

- ☐ Allocate Non-Elective Contributions to Disabled Participants who do not meet the allocation service requirements (Section 4.03(e)). Allocations to Disabled Participants end as of the earliest of: (i) the last day of the Plan Year in which occurs the ____ anniversary of the start of the Participant's Disability or (ii) such other time specified in Section 4.03(e).

28. Collective Bargaining Agreement

- a. ☐ In addition to the formula selected in D.22, an amount necessary to meet the Employer's requirements under an applicable collective bargaining agreement shall be allocated as follows: _____
- b. The collective bargaining allocations will offset any other Employer contribution allocations that would otherwise be made to a Participant:
- ☐ Yes - Non-Elective Contributions only
 - ☐ No
 - ☐ Other: _____

NOTE: D.21-26 (amount, formula, timing, maximum and minimum Non-Elective Contributions) will not apply to collectively bargained contributions. Collectively bargained contribution allocation timing, maximums and minimums will be determined under the collective bargaining agreement unless otherwise specified in D.28b.

Other Contributions/415

29. Prevailing Wage

- a. ☐ The Employer will make a prevailing wage contribution for each Participant who performs an hour or more of service under a public contract subject to the Davis-Bacon Act. The formula for allocating prevailing wage contributions shall be specified in the Prevailing Wage Addendum to the Adoption Agreement. The contribution allocated will be dependent on the Participant's job classification and the hourly rate established:
- ☐ by the applicable federal, state, or municipal prevailing wage laws.
 - ☐ in the Prevailing Wage Addendum to the Adoption Agreement.
- b. ☐ The following modifications will be made to the default prevailing wage contribution provisions (Section 4.05):
- ☐ Highly Compensated Employees will be eligible to receive prevailing wage contributions
 - ☐ The following age/service requirements apply in order to become eligible to receive prevailing wage contributions: _____
 - ☐ The following prevailing wage vesting schedule will apply: _____
 - ☐ Exclude the following from receiving benefits under an applicable prevailing wage statute under this Plan: _____
- c. Offset of other contributions:
- ☐ Employer Matching Contributions (other than safe harbor)
 - ☐ Non-Elective Contributions
 - ☐ Safe harbor contributions
 - ☐ Qualified Non-Elective Contributions (QNECs)/Qualified Matching Contributions (QMACs)

NOTE: If D.29a.ii is selected, the Prevailing Wage Addendum entry should include job classifications and applicable hourly rates. To the extent the hourly rates established in the Prevailing Wage Addendum result in a smaller contribution than is required under the applicable federal, state, or municipal prevailing wage laws, the Plan Administrator retains the discretion to make the larger contribution as the prevailing wage contribution.

NOTE: If D.29b is used to modify the default provisions applicable to prevailing wage contributions, the Plan Administrator may not be entitled to full credit for the prevailing wage contribution.

NOTE: D.29b.iv must be used to exclude a nondiscriminatory class of employees from receiving prevailing wage allocations. Employees excluded will generally still need to be provided the prevailing wage benefits in another manner.

30. QNECs/QMACs

- ☐ The following limitations, conditions or special rules apply to Qualified Non-Elective Contributions (QNECs) or Qualified Matching Contributions (QMACs): _____

If the Employer makes discretionary QNECs (Section 4.04(b)) or QMACs (Section 4.04(c)) to the Plan, the Employer must provide the Plan Administrator (or Trustee, if applicable), written instructions describing (1) how the discretionary QNEC or QMAC formula will be allocated to Participants, (2) the computation period(s) to which the discretionary QNEC or QMAC formula applies, and (3) if applicable, a description of each business location or business classification subject to separate discretionary

QNEC or QMAC allocation formulas. Such instructions must be provided no later than the date on which the discretionary QNEC or QMAC is made to the Plan. A summary of these instructions must be communicated to Participants who receive discretionary QNECs or QMACs. The summary must be communicated to Participants no later than 60 days following the date on which the last discretionary QNEC or QMAC is made to the Plan.

31. Rollovers

Rollover Contributions are permitted (Section 4.06):

- a. ☐ No
- b. ☒ Yes - All Eligible Employees may make a Rollover Contribution even if not yet a Participant in the Plan
- c. ☐ Yes - Only active Participants may make a Rollover Contribution
- d. ☐ Yes - _____ may make a Rollover Contribution

NOTE: The nondiscriminatory availability of benefits, rights, and features in Treas. Reg. section 1.401(a)(4)-4 includes rollovers as defined in 1.401(a)(4)-4(e)(3)(iii)(I) and must be available on a nondiscriminatory basis.

32. Deemed IRAs

- ☐ The Plan may accept voluntary contributions to deemed IRAs (Section 4.12).

33. Death or Disability During Qualified Military Service

- ☐ For benefit accrual purposes, a Participant that dies or becomes Disabled while performing qualified military service will be treated as if he had been employed by the Employer on the day preceding death or Disability and terminated employment on the day of death or Disability (Section 4.08).

34. 415 Additional Language

- ☐ Additional language necessary to satisfy Code section 415 because of the required aggregation of multiple plans: _____

SECTION E. VESTING**Vesting Service Rules****1. Vesting service computation method**

- a. ☒ Hours of Service. Number of Hours of Service necessary for a Year of Vesting Service (not to exceed 1,000): 1000
- b. ☐ Elapsed Time

NOTE: Unless E.1.b (Elapsed Time) is selected, the Plan will use the Hours of Service method for determining vesting service. If E.1.b (Elapsed Time) is selected, questions E.2 through E.3 are disregarded.

2. Vesting Service Equivalencies

- a. Select equivalency for vesting purposes:

- i. ☐ None.

An Employee shall be credited with the following service with the Employer:

- ii. ☐ 10 Hours of Service for each day or partial day
- iii. ☐ 45 Hours of Service for each week or partial week
- iv. ☐ 95 Hours of Service for each semi-monthly payroll period or partial semi-monthly payroll period
- v. ☒ 190 Hours of Service for each month or partial month

- b. The hours equivalency selected in E.2a shall apply to:

- i. ☐ All Employees
- ii. ☒ Only Employees for whom hours are not tracked. If the Employer tracks hours for an Employee, vesting will be determined based on actual hours worked.

3. Vesting Computation Period

- a. ☐ Calendar year
- b. ☒ Plan Year
- c. ☐ The consecutive 12-month period commencing on the date the Employee first performs an Hour of Service; each subsequent consecutive 12-month period shall commence on the anniversary of such date
- d. ☐ Other (must be a consecutive 12-month period): _____

4. Other Employer Service

- ☒ Count years of service with employers other than the Employer for vesting purposes. List other employers and indicate for

what purposes (e.g., Employer Matching, Non-Elective, etc.) the service applies along with any limitations: SMART SCHOOLS OF CALIFORNIA, INC.

5. Vesting Exceptions (Section 6.02)

- a. ☒ Death. Provide for full vesting for a Participant who terminates employment with the Employer due to death while an Employee.
- b. ☒ Disability. Provide for full vesting for a Participant who terminates employment with the Employer due to Disability while an Employee.
- c. ☐ Early Retirement. Provide for 100% vesting upon the attainment of Early Retirement Date while an Employee.

6. Vesting Exclusions

- a. ☒ Exclude Years of Vesting Service earned before age 18.
- b. ☐ Exclude Years of Vesting Service earned before the Employer maintained this Plan or a predecessor plan.
- c. ☒ One-year holdout. If an Employee has a One-Year Break in Service/Period of Severance, exclude Years of Vesting Service earned before such period until the Employee has completed a Year of Vesting Service after returning to employment with the Employer.
- d. ☒ Rule of parity. If an Employee does not have any nonforfeitable right to the Account balance derived from Employer contributions, exclude Years of Vesting Service earned before a period of five (5) consecutive One-Year Breaks in Service/Periods of Severance.

7. Special Vesting Provisions

- ☐ Provide for special vesting provisions (e.g., 100% vesting as of a certain date, or to set a different vesting schedule for employees based on division): _____

NOTE: Any special provisions must satisfy Code sections 401(a)(4) and 411.

Vesting Schedules

8. Employer Matching Contributions

Vesting Schedule for Employer Matching Contributions (Section 6.02):

- a. ☐ 100%
- b. ☒ 2-6 Year Graded
- c. ☐ 1-5 Year Graded
- d. ☐ 1-4 Year Graded
- e. ☐ 3 Year Cliff
- f. ☐ 2 Year Cliff
- g. ☐ Other:
 - i. Other Employer Match Schedule - less than 1 year: _____%
 - ii. Other Employer Match Schedule - 1 year but less than 2 years: _____%
 - iii. Other Employer Match Schedule - 2 years but less than 3 years: _____%
 - iv. Other Employer Match Schedule - 3 years but less than 4 years: _____%
 - v. Other Employer Match Schedule - 4 years but less than 5 years: _____%
 - vi. Other Employer Match Schedule - 5 years but less than 6 years: _____%
 - vii. Other Employer Match Schedule - 6 or more years: 100%.

NOTE: Any vesting schedule described in E.8g must provide vesting at least as rapidly as the "3 Year Cliff" vesting schedule or the "2-6 Year Graded" vesting schedule and E.8g.vii will be deemed to be 100%.

9. Non-Elective Contributions

Vesting Schedule for Non-Elective Contributions (Section 6.02):

- a. ☐ 100%
- b. ☒ 2-6 Year Graded
- c. ☐ 1-5 Year Graded
- d. ☐ 1-4 Year Graded
- e. ☐ 3 Year Cliff
- f. ☐ 2 Year Cliff
- g. ☐ Other:
 - i. Other Non-Elective Schedule - less than 1 year: _____%

- ii. Other Non-Elective Schedule - 1 year but less than 2 years: _____%
- iii. Other Non-Elective Schedule - 2 years but less than 3 years: _____%
- iv. Other Non-Elective Schedule - 3 years but less than 4 years: _____%
- v. Other Non-Elective Schedule - 4 years but less than 5 years: _____%
- vi. Other Non-Elective Schedule - 5 years but less than 6 years: _____%
- vii. Other Non-Elective Schedule - 6 or more years: 100%.

NOTE: Any vesting schedule described in E.9g must provide vesting at least as rapidly as the "3 Year Cliff" vesting schedule or the "2-6 Year Graded" vesting schedule and E.9g.vii will be deemed to be 100%.

10. QACA Contributions

QACA (Non-Elective and Match) Vesting Schedule (Section 6.02). Specify the vesting schedule for contributions made pursuant to C.13a.v or C.13a.vi:

- a. ☐ 100%
- b. ☐ 2 Year Cliff
- c. ☐ Other:
 - i. Other QACA Schedule - less than 1 year: _____%
 - ii. Other QACA Schedule - 1 year but less than 2 years: _____%
 - iii. Other QACA Schedule - 2 or more years: 100%.

11. Other Vesting Schedule

- a. ☐ The Plan has another vesting schedule: _____
- b. Describe the Participants to which the other vesting schedule applies: _____
- c. ☐ Retain pre-PPA Non-Elective vesting schedule for pre 2007 contributions: _____

NOTE: The vesting schedule in E.11 is in addition to the vesting schedules in E.8 through E.10.

NOTE: E.11b must be applied in a consistent and nondiscriminatory manner and must satisfy the applicable minimum vesting requirements of Code section 411(a)(2) at every point in time, for all Participants' years of service.

12. Forfeitures

Forfeitures will be used in the following manner (Article 6):

- a. ☒ Any permissible method described in Section 6.03(d)
- b. ☐ Other: _____

NOTE: If E.12a is selected, forfeitures may be allocated in any manner at the discretion of the Plan Administrator.

NOTE: E.12b is limited to one or a combination of the options described in Section 6.03(d), may be used to further restrict the uses of forfeiture, and must be applied in a consistent and nondiscriminatory manner.

SECTION F. DISTRIBUTIONS

Normal/Early Retirement

1. Normal Retirement

- a. Normal Retirement Age means:
 - i. ☐ Attainment of age (not to exceed 65): _____
 - ii. ☒ Later of attainment of age 65 or the service specified in F.1b
- b. Select the type and length of service used to measure Normal Retirement Age (not to exceed the fifth anniversary of the first day of the Plan Year in which participation commenced):
 - i. ☐ Eligibility. _____ Year(s) of Eligibility Service
 - ii. ☐ Vesting. _____ Year(s) of Vesting Service
 - iii. ☒ Participation. fifth anniversary of participation (e.g., third, fourth, etc.)
- c. Normal Retirement Date means:
 - i. ☒ Normal Retirement Age
 - ii. ☐ First day of calendar month coincident or next following Normal Retirement Age
 - iii. ☐ First day of calendar month nearest Normal Retirement Age
 - iv. ☐ Anniversary date nearest Normal Retirement Age
 - v. ☐ Other: _____

NOTE: The Normal Retirement Age shall be deemed met no later than the later of age 65 or the fifth anniversary of participation as defined in Treas. Reg. section 1.411(a)-7(b)(1) and any superseding guidance.

2. Early Retirement

- a. Early Retirement Age means:
- ☒ None. The Plan does not have an early retirement feature.
 - ☐ Attainment of age _____
 - ☐ Later of attainment of age _____ or the service specified in F.2b
- b. Select the type and length of service used to measure Early Retirement Age:
- ☐ Eligibility. _____ Year(s) of Eligibility Service
 - ☐ Vesting. _____ Year(s) of Vesting Service
 - ☐ Participation. _____ anniversary of participation (e.g., third, fourth, etc.)
- c. Early Retirement Date means:
- ☐ Early Retirement Age
 - ☐ First day of calendar month coincident or next following Early Retirement Age
 - ☐ First day of calendar month nearest Early Retirement Age
 - ☐ Anniversary date nearest Early Retirement Age
 - ☐ Other: _____

NOTE: If F.2a.iii is selected and a participant terminates from service before satisfying the age requirement for early retirement, but after satisfying the service requirement, the Participant will be entitled to elect an early retirement benefit upon reaching the required age.

Time & Form of Payment

3. Time of Payment (Other than Death)

Distributions after Termination of Employment for reasons other than death shall commence (Section 7.02):

- ☒ Immediate. As soon as administratively feasible with a final payment made consisting of any allocations occurring after such Termination of Employment.
- ☐ End of Plan Year. As soon as administratively feasible after all contributions have been allocated relating to the Plan Year in which the Participant's Account balance becomes distributable.
- ☐ Normal Retirement Date.
- ☐ Other: _____

NOTE: Any entry in "Other" must comply with Code section 401(a)(9), Section 7.02(e) and other requirements of Article 7.

4. Form of Payment (Other than Death)

Medium of distribution from the Plan:

- ☐ Cash only
- ☒ Cash or in-kind

5. Default Form of Payment (Other than Death)

- a. Unless otherwise elected by the Participant, distributions shall be made in the form of:
- ☒ Lump sum only
 - ☐ Qualified Joint and _____% Survivor Annuity (not less than 50% and not more than 100%)
- b. In addition to the form described in F.5a, distributions from the Plan after Termination for reasons other than death may be made in the following forms (select all that apply):
- ☐ Lump sum only
 - ☒ Lump sum payment or substantially equal annual, or more frequent installments over a period not to exceed the joint life expectancy of the Participant and his Beneficiary
 - ☐ Partial withdrawals - a Participant may withdraw such amounts at such times as he shall elect
 - ☐ Other: _____
- c. ☐ Partial or installment distributions will be permitted only to satisfy the required minimum distribution rules

NOTE: F.5b.iii and any entry in F.5b.iv must comply with Code section 401(a)(9), Section 7.02(e) and other requirements of Article 7.

6. Distributions as an Annuity

- Permit Participants to make distributions in the form of an annuity

- i. ☐ Yes - entire Account
 - ii. ☐ Yes - the following conditions or limitations shall apply: _____
 - iii. ☒ No
- b. Permit Beneficiaries to make distributions in the form of an annuity
- i. ☐ Yes - the entire Account
 - ii. ☐ Yes - the following conditions or limitations shall apply: _____
 - iii. ☒ No

NOTE: If selected, a Participant/Beneficiary may elect to have the Plan Administrator apply his vested Account to the extent provided above toward the purchase of an annuity contract, which shall be distributed to the Participant/Beneficiary. The terms of such annuity contract shall comply with the provisions of this Plan and any annuity contract shall be nontransferable.

NOTE: Any conditions or limitations must be applied in a consistent and nondiscriminatory manner (for example, limiting annuity distributions to Accounts in excess of a certain dollar amount.)

7. Transfer from Pension Plan

- a. ☐ The Plan has received a transfer of assets from a plan subject to the survivor annuity rules of Code sections 411(a)(11) and 417 (e.g., a money purchase or defined benefit plan).
- b. Plan name (optional): _____
- c. Transfer effective date (optional): _____
- d. Other information related to transfer assets (optional): _____

Payments on Death

8. Beneficiary Designation

To the extent that a Participant's Account is subject to the survivor annuity rules of Section 7.10, the spouse of a married Participant shall be the beneficiary of (not less than 50%) _____% of such Participant's Account unless the spouse waives his or her rights to such benefit pursuant to Section 7.10 (Section 7.04).

9. Payment upon Participant's Death

Distributions on account of the death of the Participant shall be made in accordance with the following:

- a. ☐ Pay entire Account balance by end of fifth year for all Beneficiaries in accordance with Sections 7.02(b)(1)(A) and 7.02(b)(2)(A) only
- b. ☐ Pay entire Account balance no later than the 60th day following the end of Plan Year in which the Participant dies
- c. ☒ Allow extended payments for all beneficiaries in accordance with Sections 7.02(b)(1)(A), (B) and (C) and 7.02(b)(2)(A) and (B)
- d. ☐ Pay entire Account balance by end of fifth year for Beneficiaries in accordance with Sections 7.02(b)(1)(A) and 7.02(b)(2)(A) and allow extended payments in accordance with Sections 7.02(b)(1)(B) and (C) and 7.02(b)(2)(B) only if the Participant's spouse is the Participant's sole primary Beneficiary
- e. ☐ Other: _____

NOTE: Any entry in "Other" must comply with Code section 401(a)(9), Section 7.02(b) and other requirements of Article 7.

10. Beneficiaries

- a. Death benefits when there is no designated beneficiary:
 - i. ☒ In accordance with Section 7.04(c)
 - ii. ☐ Other: _____
- b. ☐ A beneficiary designation to a spouse shall be automatically revoked upon the legal divorce of the Participant and the spouse.
- c. ☐ For purposes of determining a Participant's spouse, the one-year rule in Code section 417(d), Treas. Reg. section 1.401(a)-20 applies.

NOTE: If "Other" is selected, the description must be definitely determinable and may not be specified in a manner that is subject to Employer discretion.

Force-Out Provisions

11. Force-Out Provisions

- a. ☒ Maximum force-out amount for purposes of Section 7.03 (not to exceed \$5,000): \$5000

- i. ☐ Exclude amounts attributable to Rollover Contributions in determining the value of the Participant's nonforfeitable account balance
 - ii. Force-outs will be subject to the automatic rollover provisions of 7.06(c) if over: \$200
 - b. If the Account is subject to the survivor annuity requirements of Section 7.10, minimum Account balance for Qualified Joint and Survivor Annuity consent requirements (not to exceed \$5,000): \$ _____
 - c. Force-out of a terminated Participant's Account balance is deferred under Section 7.03(b) until:
 - i. ☐ Later of age 62 or Normal Retirement Date - payment made in a lump sum only
 - ii. ☒ Required Beginning Date - Participant may elect payment in a lump sum or installments
 - iii. ☐ Required Beginning Date - payment made in a lump sum only
 - iv. ☐ Other (must comply with Code section 411(a)(11), Section 7.03 and other requirements of Article 7): _____
- NOTE:** If F.11a is less than \$1,000, F.11a.i may not be selected.

Required Beginning Date

12. Required Beginning Date

Required Beginning Date for a Participant other than a More Than 5% Owner:

- a. ☐ Retirement. April 1 of the calendar year following the later of the calendar year in which the Participant attains age 70-1/2 or retires
- b. ☐ Age 70-1/2. April 1 of the calendar year following the calendar year in which the Participant attains age 70-1/2
- c. ☒ Election. The option provided in F.12a; provided that a Participant may elect to commence distributions pursuant to either F.12a or F.12b

SECTION G. IN-SERVICE WITHDRAWALS

NOTE: See Section 8.05 for limits on in-service distributions.

NOTE: Safe harbor contributions will be distributable when the Qualified Non-Elective Contribution Account is distributable unless otherwise limited by the Code, Treasury Regulations or Adoption Agreement.

Retirement/Hardship/Age

1. Normal/Early Retirement

- a. ☒ Allow in-service distributions after attainment of Normal Retirement Date (Section 7.01(b)) from the following Accounts: All accounts
 - b. ☐ Allow in-service distributions after attainment of Early Retirement Date (Section 7.01(a)) from the following Accounts:
- NOTE:** If the Normal Retirement Date or Early Retirement Date is less than age 59-1/2 and in-service is selected, Elective Deferrals, Qualified Non-Elective Contributions, Qualified Matching Contributions and the portion of any Account that has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) shall not be eligible for withdrawal until the Participant attains age 59-1/2.

2. Hardship

Hardship withdrawals are allowed as follows (Section 8.01):

- a. ☐ None
- b. ☐ All Accounts. A Participant may receive a distribution on account of Hardship, except from: (i) his Qualified Non-Elective Contribution Account, (ii) his Matching Contribution Account to the extent such Account has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) or to the extent such Account is treated as a Qualified Matching Contribution, and (iii) earnings on his Elective Deferral Account credited after the later of December 31, 1988, and the end of the last Plan Year ending before July 1, 1989
- c. ☒ Selected Accounts
 - i. ☒ Elective Deferral Account (excluding earnings on his Elective Deferral Account credited after the later of December 31, 1988, and the end of the last Plan Year ending before July 1, 1989)
 - ii. ☐ Employer Matching Contribution Account (except that portion that has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) or to the extent such Account is

- treated as a Qualified Matching Contribution)
- iii. ☐ Non-Elective Contribution Account
 - iv. ☐ Voluntary Contribution Account
 - v. ☒ Rollover Contribution Account
 - vi. ☐ Transfer Account
 - vii. ☐ Other: _____
- d. The criteria used in determining whether a Participant is entitled to receive a Hardship withdrawal:
- i. ☒ Safe Harbor criteria set forth in Section 8.01(b)
 - ii. ☐ Non Safe Harbor criteria set forth in Section 8.01(c)
- e. ☐ More flexible Hardship criteria applies to permitted Account(s)
- i. ☐ Use criteria specified in Section 8.01(c)
 - ii. ☐ Use criteria specified in Section 8.01(c) with the following additional criteria or modifications: _____
- f. ☒ Expand the Hardship criteria to include the Beneficiary of the Participant
- g. If a Participant may receive a Hardship withdrawal from his Elective Deferral Account, permit Hardship withdrawals from the Participant's Roth Elective Deferral Account subject to the same terms and conditions as apply to the Participant's Elective Deferral Account:
- i. ☒ Yes
 - ii. ☐ Yes - only if the withdrawal from the Roth Elective Deferral Account qualifies as a "qualified distribution" within the meaning of Code section 402A(d)(2)
 - iii. ☐ No
- h. ☐ Other limitations on Hardship withdrawals: _____

NOTE: If G.2a is selected, G.2b through G.2h do not apply.

NOTE: G.2e only applies if Hardship withdrawals are permitted from Accounts not subject to Treas. Reg. 1.401(k)-1(d) (Accounts specified in G.2c.ii-vi to the extent applicable and selected above). If G.2e is selected, the requirements of Section 8.01(b)(2) shall not apply, the amount of the hardship distribution may not exceed the Participant's vested interest under the applicable Account and the requirements of Revenue Ruling 71-224 and any superseding guidance shall apply.

NOTE: G.2f only applies if the Plan provides for in-service withdrawals on account of Hardship and uses the safe harbor criteria for Hardship determinations. If G.2f is selected, Hardship distributions may be made for a primary Beneficiary for expenses described in Treas. Reg. sections 1.401(k)-1(d)(3)(iii)(B)(1), (3), or (5) (relating to medical, tuition, and funeral expenses, respectively). A "primary Beneficiary" is an individual who is named as a Beneficiary under the Plan and has an unconditional right to all or a portion of the Participant's Account Balance upon the death of the Participant.

NOTE: G.2g only applies if A.8b is "Yes", (Roth Elective Deferrals are permitted).

NOTE: Any limitations in G.2h (such as limits on the number of withdrawals per year or minimum amount of distributions) must be objectively determinable and may not be specified in a manner that is subject to Employer discretion. Minimum amount of hardship withdrawals may not exceed \$1,000.

3. Specified Age and Service

- a. In-service withdrawals are allowed on attainment of age _____ and _____ service (Section 8.02):
- i. ☒ None
 - ii. ☐ All Accounts
 - iii. ☐ Selected Accounts
- b. If Selected Accounts is selected, specified age and service withdrawals may be made from the following Accounts:
- i. ☐ Elective Deferral Account
 - ii. ☐ Employer Matching Contribution Account
 - iii. ☐ Non-Elective Contribution Account
 - iv. ☐ Qualified Non-Elective Contribution Account
 - v. ☐ Voluntary Contribution Account
 - vi. ☐ Rollover Contribution Account
 - vii. ☐ Transfer Account
 - viii. ☐ Other: _____
- c. If a Participant may receive a withdrawal upon the attainment of a specified age and service from his Elective Deferral Account, permit such withdrawals from the Participant's Roth Elective Deferral Account subject to the same terms and conditions as apply to the Participant's Elective Deferral Account:
- i. ☐ Yes

- ii. ☐ Yes - only if the withdrawal from the Roth Elective Deferral Account qualifies as a "qualified distribution" within the meaning of Code section 402A(d)(2)
- iii. ☐ No

NOTE: If G.3a is less than age 59-1/2, Elective Deferrals, Qualified Non-Elective Contributions, Qualified Matching Contributions and the portion of any Account that has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) shall not be eligible for withdrawal until the Participant attains age 59-1/2 and completes required service; but only to the extent withdrawals are permitted from such Accounts pursuant to G.3a and G.3b.

NOTE: G.3b only applies if G.3a.iii is selected.

NOTE: G.3c only applies if A.8b is "Yes", (Roth Elective Deferrals are permitted) and G.3a.ii or G.3a.iii and G.3b.i is selected.

4. Specified Age

- a. In-service withdrawals are allowed on attainment of age 59-1/2 (Section 8.02):

- i. ☐ None
- ii. ☐ All Accounts
- iii. ☒ Selected Accounts

- b. If Selected Accounts is selected, specified age withdrawals may be made from the following Accounts:

- i. ☒ Elective Deferral Account
- ii. ☒ Employer Matching Contribution Account
- iii. ☒ Non-Elective Contribution Account
- iv. ☒ Qualified Non-Elective Contribution Account
- v. ☐ Voluntary Contribution Account
- vi. ☒ Rollover Contribution Account
- vii. ☐ Transfer Account
- viii. ☐ Other: _____

- c. If a Participant may receive a withdrawal upon the attainment of a specified age from his Elective Deferral Account, permit such withdrawals from the Participant's Roth Elective Deferral Account subject to the same terms and conditions as apply to the Participant's Elective Deferral Account:

- i. ☒ Yes
- ii. ☐ Yes - only if the withdrawal from the Roth Elective Deferral Account qualifies as a "qualified distribution" within the meaning of Code section 402A(d)(2)
- iii. ☐ No

NOTE: If G.4a is less than age 59-1/2, Elective Deferrals, Qualified Non-Elective Contributions, Qualified Matching Contributions and the portion of any Account that has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) shall not be eligible for withdrawal until the Participant attains age 59-1/2; but only to the extent withdrawals are permitted from such Accounts pursuant to G.4a and G.4b.

NOTE: G.4b only applies if G.4a.iii is selected.

NOTE: G.4c only applies if A.8b is "Yes", (Roth Elective Deferrals are permitted) and G.4a.ii or G.4a.iii and G.4b.i is selected.

Other Withdrawals

5. Withdrawals After Period of Participation

- a. ☐ Employer Matching Contributions (Section 8.03(a)). In-service withdrawals are allowed from a Participant's Employer Matching Contribution Account after _____ years of Participation
- b. ☐ Non-Elective Contributions (Section 8.03(a)). In-service withdrawals are allowed from a Participant's Non-Elective Contribution Account after _____ years of Participation

NOTE: Withdrawals under G.5a are only permitted from the Matching Contribution Account to the extent such Account has not been used to satisfy the requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) or to the extent such contributions have not been treated as Qualified Matching Contributions.

NOTE: G.5a-b may not be less than five.

6. Withdrawals After Period of Accumulation

- a. ☐ Employer Matching Contributions (Section 8.03(a)). In-service withdrawals are allowed from a Participant's Employer Matching Contribution Account on funds held for _____ years.
- b. ☐ Non-Elective Contributions (Section 8.03(a)). In-service withdrawals are allowed from a Participant's Non-Elective

Contribution Account on funds held for _____ years.

NOTE: Withdrawals under G.6a are only permitted from the Matching Contribution Account to the extent such Account has not been used to satisfy the requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) or to the extent such contributions have not been treated as Qualified Matching Contributions.

NOTE: G.6a-b may not be less than two.

7. At Any Time (Section 8.03(b))

In-service withdrawals are allowed from the following Accounts at any time:

- a. ☐ Voluntary Contribution Account
- b. ☒ Rollover Contribution Account

8. Military Distributions

- a. ☐ Qualified Reservist Distributions are permitted (Section 8.03(c))
- b. ☐ Deemed Severance Distributions are permitted (Section 8.03(d))

9. Transfer Account

Permit a distribution to be made to a Participant who has attained age 62 and who has not separated from employment from the transfer Account

- a. ☐ Yes - under any distribution option offered to a Terminated Participant
- b. ☐ Yes - limited to the following terms and conditions: _____

NOTE: G.9 only applies if F.7a is selected (Plan has received a transfer of assets from a plan subject to the survivor annuity rules of Code sections 401(a)(11) and 417).

10. Disability

- ☐ Allow distributions upon Disability.

NOTE: If G.10 is selected, the following Accounts may not be distributed unless a severe disability equivalent to A.18a. has occurred: (i) Elective Deferral Account, (ii) Qualified Non-Elective Contribution Account, (iii) Matching Contribution Account to the extent such Account has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) or to the extent such Account is treated as a Qualified Matching Contribution. A severe disability equivalent to A.18a is as follows: the Participant is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment that can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months. The permanence and degree of such impairment shall be supported by medical evidence.

Conditions/Limitations

11. Vesting Status for In-service Withdrawals

- ☒ In-service withdrawals otherwise permitted under Section G are allowed only if the distributing Account is fully vested.

NOTE: Withdrawals under G.1-10 are only permitted from the portion of a Participant's Account described in G.11 unless otherwise specified in G.12.

12. Other Conditions/Limitations

- ☐ The following limitations, conditions or special rules apply to in-service withdrawals: _____

NOTE: Unless otherwise specified, the limitations will apply to all in-service withdrawals (G.1 through G.11). G.12 must be applied in a consistent and nondiscriminatory manner. For example, G.12 could be used to specify the number of withdrawals permitted in a specified time period. See Section 8.05.

Roth Rollovers and Transfers

13. In-Plan Roth Rollovers

- a. If the Plan allows for Roth contributions, In-Plan Roth Rollovers are permitted (Section 4.06(c)):
 - i. ☒ No
 - ii. ☐ Yes - no limitations
 - iii. ☐ Yes - only if the Plan otherwise allows for the distribution/in-service withdrawal
 - iv. ☐ Yes - all distributions/in-service withdrawals permitted under the Code even if not otherwise provided under the Plan and upon the attainment of age: _____

- v. ☐ Yes - limitations or conditions apply: _____
- b. ☐ In-Plan Roth Rollovers are permitted from partially vested accounts
- c. Indicate method of preserving Code section 411(d)(6) protected benefits:
- i. ☐ Preserve existing distributions/in-service withdrawals rights for each Account
- ii. ☐ Other: _____

NOTE: To prevent terminated Employees from taking an In-Plan Roth Rollover or to limit In-Plan Roth Rollovers to a nondiscriminatory class, choose "limitations or conditions apply" and describe the circumstances under which Participants can take an In-Plan Roth Rollover.

NOTE: Elective Deferrals, Qualified Non-Elective Contributions, Qualified Matching Contributions and the portion of any Account that has been used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13) or 401(m)(11) or 401(m)(12) shall not be eligible for withdrawal until the Participant attains age 59-1/2 irrespective of G.13a.iii, an age entered under G.13a.iv, or other limitation under G.13a.v.

14. In-Plan Roth Transfers

If the Plan allows for Roth contributions, In-Plan Roth Transfers are permitted (Section 4.06(d)):

- a. ☒ No
- b. ☐ Yes
- c. ☐ Yes - limitations or conditions apply: _____.

NOTE: Assets included in an In-Plan Roth Transfer will retain the restrictions on distribution the assets had before such transfer.

SECTION H. PLAN OPERATIONS AND TOP-HEAVY

Plan Operations

1. Permitted Investments

Unless indicated below, the Plan may invest up to 100% of the Trust in "qualifying employer securities" and "qualifying employer real property" (Section 9.04(b)).

- a. ☒ Investment in "qualifying employer securities" and "qualifying employer real property" is restricted as follows: The Plan may not invest in qualifying employer securities or qualifying employer real property
- b. ☐ Investment in "qualifying employer securities" and "qualifying employer real property" is restricted to the following Accounts:
- i. ☐ Elective Deferral Account
- ii. ☐ Employer Matching Contribution Account
- iii. ☐ Voluntary Contribution Account
- iv. ☐ Non-Elective Contribution Account
- v. ☐ Qualified Non-Elective Contribution Account
- vi. ☐ Rollover Contribution Account
- vii. ☐ Transfer Account
- c. ☐ The following restrictions apply to distributions of "qualifying employer securities" and "qualifying employer real property": _____

NOTE: Any restrictions or limitations must satisfy the nondiscrimination requirements of Code section 401(a)(4).

2. Life Insurance

- ☐ Plan may invest in life insurance (Section 9.07)

3. Qualifying Longevity Annuity Contracts

- ☐ Participants may invest in a Qualifying Longevity Annuity Contract (Section 9.08)

4. Participant Self-Direction

- a. Specify the extent to which the Plan permits Participant self-direction and indicate the Plan's intent to comply with ERISA section 404(c) (Section 9.02):
- i. ☒ All Accounts and 404(c) applies
- ii. ☐ All Accounts but 404(c) does not apply
- iii. ☐ Some Accounts and 404(c) applies
- iv. ☐ Some Accounts but 404(c) does not apply

- v. ☐ None
- b. If "Some Accounts" is selected, a Participant may self-direct the following Accounts:
 - i. ☐ Elective Deferral Account
 - ii. ☐ Matching Contribution Account
 - iii. ☐ Voluntary Contribution Account
 - iv. ☐ Non-Elective Contribution Account
 - v. ☐ Qualified Non-Elective Contribution Account
 - vi. ☐ Rollover Contribution Account
 - vii. ☐ Transfer Account
 - viii. ☐ Other: _____
- c. ☐ Participants may also establish individual brokerage accounts.
- d. Participants may exercise voting rights with respect to the following investments (Section 9.06):
 - i. ☐ Employer stock only
 - ii. ☒ All investments
 - iii. ☐ Selected investments: _____

5. Valuation Date

Enter Valuation Date:

- a. ☐ Last day of Plan Year
- b. ☐ Last day of each Plan quarter
- c. ☐ Last day of each month
- d. ☒ Each business day
- e. ☐ Other: _____ (Must be at least annually).

6. Plan Administration

- a. Designation of Plan Administrator (Section 11.01):
 - i. ☒ Plan Sponsor
 - ii. ☐ Committee appointed by Plan Sponsor
 - iii. ☐ Other: _____
- b. Establishment of procedures for the Plan Administrator and the Investment Fiduciary (Sections 11.01(d) and 11.02(c)):
 - i. ☒ Plan Administrator and Investment Fiduciary adopt own procedures
 - ii. ☐ Governing body of the Plan Sponsor sets procedures for Plan Administrator and Investment Fiduciary
- c. The Trustee is also the Investment Fiduciary (Section 11.02):
 - i. ☒ Yes
 - ii. ☐ No. The Investment Fiduciary is: _____
- d. Type of indemnification for the Plan Administrator and Investment Fiduciary:
 - i. ☐ None - the Employer will not indemnify the Plan Administrator or the Investment Fiduciary
 - ii. ☒ Standard according to Section 11.06
 - iii. ☐ Provided pursuant to an outside agreement
- e. ☐ The following modifications shall be made to the duties of the applicable parties: _____

7. Claims Procedures Limitations

- ☐ The following limitations, conditions, or special rules apply to the Claims Procedures described in Section 11.07: _____

NOTE: Any limitations, conditions, or special rules must satisfy requirements under DOL regulations or any other applicable guidance.

Top-Heavy

8. Top-Heavy Allocations

- a. Top-Heavy allocations are made to:
 - i. ☒ This Plan. Participants who share in Top-Heavy minimum allocations:
 - A. ☒ Non-Key only. Any Participant who is employed by the Employer on the last day of the Plan Year and is not a Key Employee
 - B. ☐ All Participants. Any Participant who is employed by the Employer on the last day of the Plan Year
 - C. ☒ Participants covered by a collective bargaining agreement will share in Top-Heavy minimum allocations

provided retirement benefits were the subject of good faith bargaining.

- ii. ☐ Another plan: _____
- iii. ☐ Other (include information about which Plan allocations are made to and which Participants in this Plan will share in Top-Heavy minimums): _____
- b. Other plan maintained by the Employer
 - i. ☒ N/A - no other plan
 - ii. ☐ Defined Contribution
 - iii. ☐ Defined Benefit

NOTE: H.8a.i.C may be selected in addition to H.8a.i.A or H.8a.i.B. If H.8a.i.C applies and is not selected, Employees covered under a collective bargaining agreement that bargains in good faith for retirement benefits shall not be eligible to receive top-heavy minimum allocations.

NOTE: If the Employer also maintains a defined benefit plan and if such plan is silent with respect to the actuarial assumptions used to determine the present value of accrued benefits for Top-Heavy purposes, then the assumptions used must be reasonable, need not relate to the actual plan and investment experience, and need not be the same as those used for minimum funding purposes or for purposes of determining the actual equivalence of optional benefits under the Plan.

9. Top-Heavy Vesting

Top-Heavy vesting schedule (Section 10.03):

- a. ☐ Not applicable - Vesting schedule is Top-Heavy compliant
- b. ☐ 100%
- c. ☒ 2-6 Year Graded
- d. ☐ 1-5 Year Graded
- e. ☐ 1-4 Year Graded
- f. ☐ 3 Year Cliff
- g. ☐ 2 Year Cliff
- h. ☐ Other:
 - i. Other Top-Heavy Schedule - less than 1 year: _____%
 - ii. Other Top-Heavy Schedule - 1 year but less than 2 years: _____%
 - iii. Other Top-Heavy Schedule - 2 years but less than 3 years: _____%
 - iv. Other Top-Heavy Schedule - 3 years but less than 4 years: _____%
 - v. Other Top-Heavy Schedule - 4 years but less than 5 years: _____%
 - vi. Other Top-Heavy Schedule - 5 years but less than 6 years: _____%
 - vii. Other Top-Heavy Schedule - 6 or more years: 100%.

NOTE: If "Other" is selected, any vesting schedule described in H.9h must provide vesting at least as rapidly as the "3 Year Cliff" vesting schedule or the "2-6 Year Graded" vesting schedule.

10. 416 Additional Language

- ☐ Additional language necessary to satisfy Code section 416 because of the required aggregation of multiple plans: _____

SECTION I. MISCELLANEOUS

Failure to properly fill out the Adoption Agreement may result in disqualification of the Plan.

The Plan shall consist of this Adoption Agreement #001, its related Basic Plan Document #01, and any Addendum to the Adoption Agreement.

The adopting Employer may rely on an opinion letter issued by the Internal Revenue Service as evidence that the Plan is qualified under Code section 401 only to the extent provided in Revenue Procedure 2017-41 and any superseding guidance. The Employer may not rely on the opinion letter in certain other circumstances or with respect to certain qualification requirements, which are specified in the opinion letter issued with respect to the Plan and in Revenue Procedure 2017-41 and any superseding guidance. In order to have reliance in such circumstances or with respect to such qualification requirements, application for a determination letter must be made to Employee Plans Determinations of the Internal Revenue Service. The Pre-Approved Plan Provider will inform the adopting Employer of any amendments made to the Plan or of the discontinuance or abandonment of the Plan. The

Pre-Approved Plan Provider, PENSION MANAGEMENT CONSULTANTS, INC. may be contacted at 1165 Scenic Drive Ste B1, MODESTO, CA 95350; 209-578-5593.

SECTION J. EXECUTION PAGE

The undersigned agree to be bound by the terms of this Adoption Agreement and Basic Plan Document and acknowledge receipt of same. The parties have caused this Plan to be executed this _____ day of _____, 2022.

GREAT VALLEY ACADEMY:

Signature: _____

Print Name: _____

Title/Position: _____

EFFECTIVE DATE ADDENDUM

Use this Addendum to provide any effective dates for Plan provisions other than the Effective Date specified in A.3. Any date entered may not override an effective date required by the Internal Revenue Code, Treasury & Department of Labor Relations or other formal guidance. Use of this Addendum shall not be considered a modification to the Pre-Approved Plan Document.

Effective 07/01/2015 the Plan was restated.

HARDSHIP DISTRIBUTION ADDENDUM

This Addendum is intended as a good faith effort to comply with the requirements of the hardship distribution final regulations and is to be construed in accordance with same. Both the Addendum and the provisions of the hardship distribution final regulations will supersede any inconsistent Plan provisions.

For each item below, if the check boxes are empty, the *italicized* provision will apply.

1. Deferral Earnings

Effective on the first day of the first plan year after December 31, 2018, hardship distributions may be taken from earnings on all Elective Deferrals.

- ☒ Effective 01/01/2020, earnings on all Elective Deferrals are available for hardship distributions.
- ☐ Hardship distributions continue to only be available from earnings on Elective Deferrals grandfathered under Treas. Reg. section 1.401(k)-1(d)(3)(ii)(B).

2. Safe Harbor Contributions/QNECs/QMACs

Effective on the first day of the first plan year after December 31, 2018, if available under the Plan, Qualified Non-Elective Contributions (QNECs), Qualified Matching Contributions (QMACs) or contributions used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13), or 401(m)(11) or 401(m)(12), will be available for hardship distributions.

- ☐ Effective _____, hardship distributions are permitted from Qualified Non-Elective Contributions, Qualified Matching Contributions or contributions used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13), or 401(m)(11) or 401(m)(12), if available under the Plan.
- ☒ Hardship distributions continue to be prohibited from Qualified Non-Elective Contributions, Qualified Matching Contributions or contributions used to satisfy the safe harbor requirements of Code sections 401(k)(12) or 401(k)(13), or 401(m)(11) or 401(m)(12).

3. Amount Necessary to Satisfy Need Requirement

Effective on the first day of the first plan year after December 31, 2018, a hardship distribution will be considered necessary to satisfy an immediate and heavy financial need of the Participant only if:

- *The distribution is not in excess of the amount required to satisfy the financial need (including any amounts necessary to pay any federal, state or local income taxes or penalties reasonably anticipated to result from the distribution);*
- *The Participant has obtained all other currently available distributions, other than hardship distributions, under any deferred compensation plan, whether qualified or nonqualified, maintained by the Employer; and*
- *Effective for distributions made on or after January 01, 2020, the Participant has represented (in writing or by an electronic medium) that he has insufficient cash or other liquid assets to satisfy the financial need.*

- ☒ Effective 01/01/2020, a distribution will be determined to satisfy an immediate and heavy financial need only if the three criteria listed above are met.

- ☐ The following provisions will be used for complying with the amount necessary to satisfy need requirement: _____

4. Six-Month Suspension

If the Safe Harbor criteria are used for hardship distributions, effective on the first day of the first plan year after December 31, 2018, the six-month suspension period for Elective Deferrals (and after-tax contributions) will no longer be a condition for obtaining a hardship distribution, even if the hardship distribution was made in the prior plan year.

- ☒ Effective 01/01/2020, the Plan will not initiate a six-month suspension period on Elective Deferrals (and after-tax

contributions) following a hardship distribution (cannot be later than January 01, 2020).

- ☒ The Plan will discontinue any remaining portion of the suspension period for hardship distributions made prior to the entered effective date.
- ☐ The Plan will continue any remaining portion of the full six-month suspension period for hardship distributions made prior to the entered effective date.

5. Loan Requirement

If the Safe Harbor criteria are used for hardship distributions, effective on the first day of the first plan year after December 31, 2018, Participants are not required to take all nontaxable loans under all plans maintained by the Employer prior to applying for a hardship distribution.

- ☒ Effective 01/01/2020, Participants are not required to take all available nontaxable loans before applying for a hardship distribution.
- ☐ Participants must continue to take all nontaxable loans under all plans maintained by the Employer before applying for a hardship distribution.

6. Safe Harbor Financial Needs

If the Safe Harbor criteria are used for hardship distributions, the following immediate and heavy financial needs are considered as safe harbor criteria for hardship distributions made on or after January 01, 2018:

- *Expenses for the repair of damage to the Employee's principal residence that would qualify for the casualty deduction under Code section 165 (determined without regard to section 165(h)(5) and whether the loss exceeds 10% of adjusted gross income).*
- *Expenses and losses (including loss of income) incurred by the Employee on account of a disaster declared by the Federal Emergency Management Agency (FEMA) under the Robert T. Stafford Disaster Relief and Emergency Assistance Act, provided that the Employee's principal residence or principal place of employment at the time of the disaster was located in an area designated by FEMA for individual assistance with respect to the disaster.*

- ☒ Effective 01/01/2020, the immediate and heavy financial needs listed above are considered as safe harbor criteria for hardship distributions.
- ☐ The immediate and heavy financial needs listed above are not considered as safe harbor criteria for hardship distributions.

SECURE/CARES/CAA ADDENDUM

This Addendum is intended as a good faith effort to comply with the requirements of the Further Consolidated Appropriations Act, 2020, including the SECURE Act provisions, the Coronavirus, Aid, Relief and Economic Security (CARES) Act, and the Consolidated Appropriations Act, 2021 (CAA), and corresponding guidance (the "Applicable Law"). This Addendum is to be construed in accordance with the Applicable Law and both the Addendum and the Applicable Law will supersede any inconsistent Plan provisions.

OPTIONAL PROVISIONS:

For each item below, if the check boxes are empty, the *italicized* provision will apply.

1. Qualified Birth or Adoption Distributions (see Section A. below)

The Plan does not permit qualified birth or adoption distributions as a separate distribution event.

- ☐ Effective _____ (no earlier than January 01, 2020), the Plan permits qualified birth or adoption distributions as a separate distribution event.
- ☐ The following limitations and conditions apply: _____.

2. Treatment of 2020 RMDs (see Section B. below)

*Effective January 01, 2020, unless the Participant or beneficiary chooses otherwise, a Participant or beneficiary who would have been required to receive a 2020 RMD will **not** receive this distribution.*

Effective _____ (no earlier than January 01, 2020):

- ☐ Unless the Participant or beneficiary chooses otherwise, a Participant or beneficiary who would have been required to receive a 2020 RMD will **not** receive this distribution.
- ☐ Unless the Participant or beneficiary chooses otherwise, a Participant or beneficiary who would have been required to receive a 2020 RMD will receive this distribution.

3. 2020 RMDs as Direct Rollovers (see Section B. below)

A direct rollover is not offered for 2020 RMDs or Extended 2020 RMDs.

For purposes of the direct rollover provisions of the Plan, the following will be treated as eligible rollover distributions in 2020:

- ☐ 2020 RMDs.
- ☐ 2020 RMDs and Extended 2020 RMDs.
- ☐ 2020 RMDs, but only if paid with an additional amount that is an eligible rollover distribution without regard to Code section 401(a)(9)(I).

4. Portability of Lifetime Income Options (see Section F. below)

The Plan does not permit "qualified distributions" or "qualified plan distribution annuity contracts" of lifetime income investment options.

- ☐ The Plan permits "qualified distributions" or "qualified plan distribution annuity contracts" of lifetime income investment options when such investment options are no longer authorized to be held as an investment option under the Plan effective: _____ (no earlier than the plan year beginning after December 31, 2019).

☐ The following limitations and conditions apply: _____.

5. Transfer Account

The existing Plan provisions, if any, remain in effect for distributions to a Participant who has not separated from employment from a Transfer Account holding assets transferred from a plan subject to the survivor annuity rules of Code section 401(a)(11) and 417 (e.g., age cannot be less than 62).

☐ Effective _____ (no earlier than January 01, 2020), the Plan permits distributions to a Participant who has not separated from employment from a Transfer Account holding assets transferred from a plan subject to the survivor annuity rules of Code section 401(a)(11) and 417 if the Participant attains: _____ (age cannot be less than 59-1/2).

STANDARD PROVISIONS:

A. Qualified Birth or Adoption Distributions

To the extent provided above, a Participant may receive a distribution up to \$5,000 during the 1-year period beginning on the date on which the Participant's child is born or on which the legal adoption by the Participant of an eligible adoptee is finalized. An eligible adoptee is any individual (other than a child of the Participant's spouse) who has not attained age 18 or is physically or mentally incapable of self-support. The \$5,000 maximum is an aggregate amount of such distributions from all plans maintained by the Employer.

B. Required Minimum Distributions

In defining Required Beginning Date or determining required minimum distributions, any references to age 70-1/2 are replaced with: age 70-1/2 (for Participants born before July 01, 1949) or age 72 (for Participants born after June 30, 1949).

Notwithstanding other provisions of the Plan to the contrary and if selected above, a Participant or beneficiary who would have been required to receive required minimum distributions in 2020 (or paid in 2021 for the 2020 calendar year for a Participant with a required beginning date of April 01, 2021) but for the enactment of section 401(a)(9)(I) of the Code ("2020 RMDs"), and who would have satisfied that requirement by receiving distributions that are either: (1) equal to the 2020 RMDs, or (2) one or more payments (that include the 2020 RMDs) in a series of substantially equal periodic payments made at least annually and expected to last for the life (or life expectancy) of the Participant, the joint lives (or joint life expectancies) of the Participant and the Participant's designated beneficiary, or for a period of at least 10 years ("Extended 2020 RMDs"), may receive those distributions.

C. Distribution on Account of Death for Certain Eligible Retirement Plans

Whether before or after distribution has begun, a Participant's entire interest will be distributed to the designated beneficiary by December 31 of the calendar year containing the tenth anniversary of the Participant's death unless the designated beneficiary meets the requirements of an "eligible designated beneficiary". An "eligible designated beneficiary" may receive distributions over the life of such designated beneficiary. If there is no designated beneficiary as of September 30 of the year following the year of the Participant's death, the Participant's entire interest will be distributed by December 31 of the calendar year containing the fifth anniversary of the Participant's death.

An "eligible designated beneficiary" is defined as any designated beneficiary who is: (i) the surviving spouse of the Participant; (ii) a minor child of the Participant; (iii) disabled; (iv) a chronically ill individual; or (v) an individual who is not more than 10 years younger than the Participant. The determination of whether a designated beneficiary is an "eligible designated beneficiary" is made as of the date of death of the Participant. If an "eligible designated beneficiary" dies before the portion of the Participant's interest is entirely distributed, the remainder of such portion must be distributed within 10 years after the death of such "eligible designated beneficiary".

D. Qualified Automatic Contribution Arrangement (QACA)

If a Qualified Automatic Contribution Arrangement (QACA) feature is elected, the Plan Administrator has the discretion to increase automatic elections subsequent to the initial period up to a maximum limitation of 15% of Plan Compensation.

E. Safe Harbor Notice

If the non-elective contribution method is elected for safe harbor plan exemption (including under a Qualified Automatic Contribution Arrangement), effective for Plan years beginning on or after January 01, 2020, the safe harbor notice is not required for satisfying the conditions of Code sections 401(k)(12) or 401(k)(13).

F. Portability of Lifetime Income Investments

To the extent provided above, any amounts invested in a "lifetime income investment" may be distributed through either "qualified distributions" or "qualified plan distribution annuity contracts" no earlier than 90 days prior to the date that such "lifetime income investment" may no longer be held as an investment option under the Plan.

The following terms are used in this section:

"Qualified distribution" means a direct trustee-to-trustee transfer described in Code section 401(a)(31)(A) to an eligible retirement plan (as defined in Code section 402(c)(8)(B)).

"Qualified plan distribution annuity contract" means an annuity contract purchased for a Participant and distributed to the Participant by a plan or contract described in subparagraph (B) of Code section 402(c)(8) (without regard to clauses (i) and (ii) thereof).

"Lifetime income investment" means an investment option which is designed to provide an employee with election rights which: (a) are not uniformly available with respect to other investment options under the plan, and (b) are to a "lifetime income feature" available through a contract or other arrangement offered under the plan (or under another eligible retirement plan (as so defined), if paid by means of a direct trustee-to-trustee transfer described in Code section 401(a)(31)(A) to such other eligible retirement plan).

"Lifetime income feature" means: (a) a feature which guarantees a minimum level of income annually (or more frequently) for at least the remainder of the life of the employee or the joint lives of the employee and the employee's designated beneficiary, or (b) an annuity payable on behalf of the employee under which payments are made in substantially equal periodic payments (not less frequently than annually) over the life of the employee or the joint lives of the employee and the employee's designated beneficiary.

G. Disaster or Coronavirus-Related Relief

Notwithstanding any provision of the Plan to the contrary, the Plan may grant temporary disaster or coronavirus-related relief in compliance with Code sections 1400M and 1400Q, section 15345 of the Food, Conservation, and Energy Act of 2008, section 702 of the Heartland Disaster Tax Relief Act of 2008, section 502 of the Disaster Tax Relief and Airport and Airway Extension Act of 2017, section 11028 of the Tax Cuts and Jobs Act of 2017, section 20102 of the Bipartisan Budget Act of 2018, subtitle II of Division Q of the Further Consolidated Appropriations Act, 2020, section 2202 of the Coronavirus, Aid, Relief and Economic Security Act, and Title III of Division EE of the Consolidated Appropriations Act, 2021 ("Applicable Law"). This Section only applies to the extent the Plan has provided some or all of the relief listed below in compliance with Applicable Law.

A. Qualified Distributions

- I. "Qualified Distribution" means a distribution to a qualified individual within the applicable time periods as defined in the relevant sections of Applicable Law which may not exceed \$100,000 in aggregate from all plans maintained by the Employer.

- II. If the Plan permits rollover contributions, at any time during the 3-year period beginning on the day after the Qualified Distribution was received, an individual may contribute as a rollover to the Plan an aggregate amount that does not exceed the amount of the Qualified Distribution.
- III. If the Plan permits rollover contributions, an individual who received a withdrawal for the purchase of a home, but could not use the withdrawal amount due to the disaster, may contribute as a rollover to the Plan an aggregate amount that does not exceed the amount of the withdrawal amount within the applicable time periods as defined in the relevant sections of Applicable Law.

B. Expanded Loan Provisions

- I. The maximum loan limit under Code section 72(p)(2)(A) may be applied by substituting "\$100,000" for "\$50,000" and substituting "the present value" for "one-half the present value" under the Loan Procedures for a qualified individual within the applicable time periods as defined in the relevant sections of Applicable Law.
- II. The loan repayment may be delayed for 1 year for a qualified individual within the applicable time periods as defined in the relevant sections of Applicable Law.
- III. Subsequent repayments will be adjusted to reflect the 1-year delay and any interest accrued during such delay.
- IV. The 1-year delay will be disregarded in determining the 5-year maximum term of loans under Code section 72(p)(2)(B) and (C).

H. Difficulty of Care Payments Included in Statutory Compensation

In determining the contribution limitation, Statutory Compensation will be increased by qualified foster care payments. Qualified foster care payments are difficulty of care payments excluded from gross income under Code section 131. Any contribution by the Participant which is allowable due to such increase is treated as an after-tax contribution.

I. Long-Term, Part-Time Employees

Notwithstanding any provision of the Plan to the contrary, effective for Plan years beginning after December 31, 2020, any Employee working at least 500 hours of service during each of three consecutive 12-month periods ("LTPT Employee") becomes a Participant eligible to make Elective Deferrals on the date specified in the Plan provided that he or she is an Eligible Employee and has attained the applicable age requirement, if any, on such date. No 12-month period beginning before January 01, 2021 is taken into account. Each 12-month period for which an LTPT Employee has at least 500 hours of service is treated as a year of service for vesting purposes.

GREAT VALLEY ACADEMY

401(K) PLAN AND TRUST

TRUST AGREEMENT

2022

Pension Management Consultants, Inc.
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TRUST AGREEMENT

THIS TRUST AGREEMENT is effective July 01, 2021, between GREAT VALLEY ACADEMY (the "Employer"), and the Governing Board of Great Valley Academy (the "Trustee").

WHEREAS, the Employer sponsors the GREAT VALLEY ACADEMY 401(K) PLAN AND TRUST (the "Plan") for the benefit of employees eligible to participate therein (the "Participants") and their beneficiaries (the "Beneficiaries");

WHEREAS, the Employer designates the Trustee to act as the trustee of a trust constituting a part of the Plan (the "Trust"), pursuant to which assets are being held to provide for the funding and payment of benefits under the Plan;

WHEREAS, the Trustee is willing to serve as trustee for the Plan and to hold in trust those assets of the Plan that have been and will be transferred to the Trustee in accordance with the provisions of this Agreement (the "Trust Fund");

WHEREAS, the Employer is, or has designated a person(s) to act as, the "Plan Administrator" as that term is defined in the Plan;

WHEREAS, the Employer has designated a fiduciary to select Trust Fund investments and perform other duties with respect to the investment of the Trust Fund (the "Investment Fiduciary");

WHEREAS, the Employer and the Trustee deem it necessary and desirable to enter into a written agreement of trust; and

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties hereto, intending to be legally bound, hereby agree and declare as follows:

ARTICLE I TRUST FUND

Section 1.01 Trust Fund. A Trust is hereby established or continued under the Plan and the Trustee will maintain a trust account for the Plan and, as part thereof, accounts for such individuals as the Employer shall from time to time give written notice to the Trustee are Participants in the Plan. The Trustee will accept and hold in the Trust Fund such contributions on behalf of Participants as it may receive from time to time from the Employer, including amounts transferred by any prior trustee of the Plan, and such earnings, income and appreciation as may accrue thereon; less losses, depreciation and payments made by the Trustee to carry out the purposes of the Plan. The Trust Fund shall be fully invested and reinvested in accordance with the applicable provisions of the Plan.

Section 1.02 Exclusive Benefit. All contributions made to the Plan are made for the exclusive benefit of the Participants and their Beneficiaries, and such contributions shall not be used for, or diverted to, purposes other than for the exclusive benefit of the Participants and their Beneficiaries (including the costs of maintaining and administering the Plan and corresponding Trust).

Section 1.03 Return of Contributions. Notwithstanding any other provision of the Plan: (a) as contributions made prior to the receipt of an initial determination letter are conditional upon a favorable determination as to the qualified status of the Plan under Code section 401(a), if the Plan receives an adverse determination with respect to its initial qualification, then any such contribution may be returned to the Employer within one year after such determination, provided the application for determination is made by the time prescribed by law; (b) contributions made by the Employer based upon mistake of fact may be returned to the Employer within one year of such contribution; (c) as all contributions to the Plan are conditioned upon their deductibility under the Code, if a deduction for such a contribution is disallowed, such contribution may be returned to the Employer within one year of the disallowance of such deduction; and (d) after all liabilities under the Plan have been satisfied, the remaining assets of the Trust shall be distributed to the Employer if such distribution does not contravene any provision of applicable law.

In the case of the return of a contribution due to mistake of fact or the disallowance of a deduction, the amount that may be returned is the excess of the amount contributed over the amount that would have been contributed had there not been a mistake or disallowance. Earnings attributable to the excess contributions may not be returned to the Employer but losses

attributable thereto must reduce the amount to be so returned. Any return of contribution or distribution of assets made by the Trustee pursuant to this Section shall be made only upon the direction of the Employer, which shall have exclusive responsibility for determining whether the conditions of such return or distribution have been satisfied and for the amount to be returned.

Section 1.04 Assets Not Held by Trustee. The Trustee shall not be responsible for any assets of the Plan that are held outside of the Trust Fund. The Trustee is expressly hereby relieved of any responsibility or liability for any losses resulting to the Plan arising from any acts or omissions on the part of any insurance company holding assets outside of the Trust Fund. The Trustee may require the Employer to serve as custodian for all promissory notes and related documents issued in connection with the Plan's Participant loan program and require the Employer to be responsible for the safekeeping of same.

Section 1.05 Group Trust. In the event that the Trust is a part of any group trust (within the meaning of Internal Revenue Service Revenue Rulings 81-100 and 2011-1): (a) participation in the Trust is limited to (i) individual retirement accounts which are exempt under Code section 408(e), (ii) pension and profit-sharing trusts which are exempt under Code section 501(a) by qualifying under Code section 401(a) and (iii) accounts under Code sections 403(b)(7), 403(b)(9) and governmental retiree benefit plans under Code section 401(a)(24) to the extent the requirements of Revenue Ruling 2011-1 are met; (b) no part of the corpus or income which equitably belongs to any individual retirement account or Employer's trust may be used for or diverted to any purposes other than for the exclusive benefit of the individual or the Employees, respectively, or their Beneficiaries who are entitled to benefits under such participating individual retirement account or Employer's trust; (c) no part of the equity or interest in the Trust Fund shall be subject to assignment by a participating individual retirement account or Employer's trust; and (d) the Trustee shall maintain separate accounts for each participating trust or individual retirement account.

ARTICLE II DUTIES OF THE TRUSTEE

Section 2.01 In General. The Trustee is not a party to, and has no duties or responsibilities under the Plan, other than those that may be expressly contained in this Article. The Trustee shall have no duties, responsibilities or liability with respect to the acts or omissions of any prior trustee. The Trustee shall discharge its assigned duties and responsibilities under this Article and the Plan with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims.

Section 2.02 Contributions. The Trustee agrees to accept contributions that are paid to it by the Plan Administrator (as well as rollover contributions and direct transfers from other eligible retirement plans) in accordance with the terms of this Article. Such contributions shall be in cash or in such other form that may be acceptable to the Trustee. In-kind contributions of other than qualifying employer securities are permitted only in non-pension plans provided that the contribution is discretionary and unencumbered. Qualifying employer securities may be contributed to both pension and non-pension plans subject to the requirements of ERISA section 408(e). The Trustee shall have no responsibility for any property until it is received by the Trustee. The Plan Administrator shall have the sole duty and responsibility for the determination of the accuracy or sufficiency of the contributions to be made under the Plan, the transmittal of the same to the Trustee and compliance with any statute, regulation or rule applicable to contributions.

Section 2.03 Distributions. The Trustee shall make distributions out of the Trust Fund pursuant to instructions described in Article V. The Trustee shall not have any responsibility or duty under this Article for determining that such are in accordance with the terms of the Plan and applicable law, including without limitation, the amount, timing or method of payment and the identity of each person to whom such payments shall be made. The Trustee shall have no responsibility or duty to determine the tax effect of any payment or to see to the application of any payment. In making payments, the Employer acknowledges that the Trustee is acting as a paying agent and not as the payor, for tax information reporting and withholding purposes. In the event that any dispute shall arise as to the persons to whom payment or delivery of any assets shall be made by the Trustee, the Trustee may withhold such payment or delivery until such dispute shall have been settled by the parties concerned or shall have been determined by a court of competent jurisdiction.

Section 2.04 Records. The Trustee shall keep full and accurate accounts of all receipts, investments, disbursements and other transactions hereunder, including such specific records as may be agreed upon in writing between the Employer and the Trustee. All such accounts, books and records shall be open to inspection and audit at all reasonable times by any authorized

representative of the Employer or the Plan Administrator. A Participant may examine only those individual account records pertaining directly to him.

Section 2.05 Accounting. The Trustee shall file with the Plan Administrator a written account of the administration of the Trust Fund showing all transactions effected by the Trustee subsequent to the period covered by the last preceding account and all property held at the end of the accounting period. The Trustee shall use its best effort to file such written account within ninety (90) days, but not later than one hundred twenty (120) days after the end of each Plan Year. Upon approval of such accounting by the Plan Administrator, neither the Employer nor the Plan Administrator shall be entitled to any further accounting by the Trustee. The Plan Administrator may approve such accounting by written notice of approval delivered to the Trustee or by failure to express objection to such accounting in writing delivered to the Trustee within six (6) months from the date on which the accounting is delivered to the Plan Administrator.

Section 2.06 Participant Eligibility. The Trustee shall not be required to determine the facts concerning the eligibility of any Participant to participate in the Plan, the amount of benefits payable to any Participant or Beneficiary under the Plan, or the date or method of payment or disbursement. The Trustee shall be fully entitled to rely in good faith solely upon the written advice and directions of the Plan Administrator as to any such question of fact.

Section 2.07 Indicia of Ownership. The Trustee shall not hold the indicia of ownership of any assets of the Trust Fund outside of the jurisdiction of the District Courts of the United States, unless in compliance with section 404(b) of ERISA and regulations thereunder.

Section 2.08 Notice. The Trustee shall provide the Employer with advance notice of any legal actions the Trustee may take with respect to the Plan and Trust and shall promptly notify the Employer of any claim against the Plan and Trust.

Section 2.09 Other Fiduciaries. The Trustee shall not be responsible for the acts or omissions of any other persons except as may be required by ERISA section 405.

ARTICLE III GENERAL INVESTMENT POWERS

In addition to all powers and authority under common law, statutory authority and other provisions of this Article, the Trustee shall have the following powers and authorities to be exercised in accordance with and subject to the provisions of Article IV hereof:

Section 3.01 Invest and reinvest the Trust Fund in any property, real, personal or mixed, wherever situated, and whether situated, and whether or not productive of income or consisting of wasting assets, including, without limitation, common and preferred stock, bonds, notes, debentures, options, mutual funds, leaseholds, mortgages (including without limitation, any collective or part interest in any bond and mortgage or note and mortgage), certificates of deposit, and oil, mineral or gas properties, royalties, interests or rights (including equipment pertaining thereto), without being limited to the classes of property in which trustees are authorized by law or any rule of court to invest trust funds and without regard to the proportion any such property may bear to the entire amount of the Trust Fund;

Section 3.02 Hold property in nominee name, in bearer form, or in book entry form, in a clearinghouse corporation or in a depository, provided that such property is held in conformance with DOL Reg. section 2550-403a-1(b) and that such property is held by (i) a bank or trust company that is subject to supervision by the United States or a state, or a nominee of such bank or trust company, (ii) a broker or dealer registered under the Securities Exchange Act of 1934, or a nominee of such broker or dealer; (iii) a "clearing agency," as defined in section 3(a)(23) of the Securities Exchange Act of 1934, or its nominee; or (iv) any other entity as provided in DOL Reg. section 2550-403a-1(b);

Section 3.03 Collect income payable to and distributions due to the Trust Fund and sign on behalf of the Trust any declarations, affidavits, certificates of ownership and other documents required to collect income and principal payments, including but not limited to, tax reclamations, rebates and other withheld amounts;

Section 3.04 To sell, exchange, convey, transfer, grant options to purchase, or otherwise dispose of any securities or other property held by the Trustee. No person dealing with the Trustee shall be bound to see to the application of the purchase money or to inquire into the validity, expediency, or propriety of any such sale or other disposition;

Section 3.05 Pursuant to the terms of Article VI, to vote upon any stocks, bonds, or other securities; to give general or special proxies or powers of attorney with or without power of substitution; to exercise any conversion privileges, subscription rights or other options, and to make any payments incidental thereto; to oppose, or to consent to, or otherwise participate in, corporate reorganizations or other changes affecting corporate securities, and to delegate discretionary powers, and to pay any assessments or charges in connection therewith; and generally to exercise any of the powers of an owner with respect to stocks, bonds, securities, or other property;

Section 3.06 Take all action necessary to pay for authorized transactions or make authorized distributions, including exercising the power to borrow or raise monies from any lender, upon such terms and conditions as are necessary to settle such transactions or distributions;

Section 3.07 To keep such portion of the Trust Fund uninvested in cash or cash balances as the Trustee may, from time to time, deem to be in the best interests of the Plan, without liability for interest thereon;

Section 3.08 To accept and retain for such time as the Trustee may deem advisable any securities or other property received or acquired as Trustee hereunder, whether or not such securities or other property would normally be purchased as investments hereunder;

Section 3.09 To make, execute, acknowledge, and deliver any and all documents of transfer and conveyance and any and all other instruments that may be necessary or appropriate to carry out the powers herein granted;

Section 3.10 To settle, compromise, or submit to arbitration any claims, debts, or damages due or owing to or from the Trust Fund, to commence or defend suits or legal or administrative proceedings, and to represent the Plan and/or Trust Fund in all suits and legal and administrative proceedings;

Section 3.11 To invest in Treasury Bills and other forms of United States government obligations;

Section 3.12 To deposit cash in accounts in the banking department of the Trustee or an affiliated banking organization;

Section 3.13 To deposit monies in federally insured savings accounts or certificates of deposit in banks or savings and loan associations;

Section 3.14 To invest and reinvest all or any portion of the Trust Fund collectively with funds of other retirement plan trusts exempt from tax under Code section 501(a), including, without limitation, the power to invest collectively with such other funds through the medium of one or more common, collective or commingled trust funds which have been or may hereafter be operated by the Trustee, the instrument or instruments establishing such trust fund or funds, as amended from time to time, being made part of this Trust so long as any portion of the Trust Fund shall be invested through the medium thereof;

Section 3.15 To sell, either at public or private sale, option to sell, mortgage, lease for a term of years less than or continuing beyond the possible date of the termination of the Trust created hereunder, partition or exchange any real property which may from time to time constitute a portion of the Trust Fund, for such prices and upon such terms as it may deem best, and to make, execute and deliver to the purchasers thereof good and sufficient deeds of conveyance therefor and all assignments, transfers and other legal instruments, either necessary or convenient for the passing of the title and ownership thereof to the purchaser, free and discharged of all trusts and without liability on the part of such purchasers to see to the proper application of the purchase price;

Section 3.16 To repair, alter, improve or demolish any buildings which may be on any real estate forming part of the Trust Fund or to erect entirely new structures thereon;

Section 3.17 To renew, extend or participate in the renewal or extension of any mortgage, upon such terms as may be deemed advisable, and to agree to a reduction in the rate of interest on any mortgage or to any other modification or change in the terms of any mortgage or of any guarantee pertaining thereto, in any manner and to any extent that may be deemed advisable for the protection of the Trust Fund or the preservation of the value of the investment; to waive any default, whether in the performance of any covenant or condition of any mortgage or in the performance of any guarantee, or to enforce any such default in such manner and to such extent as may be deemed advisable; to exercise and enforce any and all rights of foreclosure, to bid on property in foreclosure, to take a deed in lieu of foreclosure with or without paying a consideration therefor, and in connection therewith to release the obligation on the bond or note secured by the mortgage; and to exercise and enforce in any action, suit or proceeding at law or in equity any rights or remedies in respect to any mortgage or guarantee;

Section 3.18 To purchase any authorized investment at a premium or at a discount;

Section 3.19 To purchase any annuity contract; and

Section 3.20 To do all such acts and exercise all such rights and privileges, although not specifically mentioned herein, as the Trustee may deem necessary to carry out the purposes of the Plan.

ARTICLE IV OTHER INVESTMENT POWERS

Section 4.01 Requirement for Preapproval. The powers granted the Trustee under Article III shall be exercised by the Trustee upon the written direction from the Investment Fiduciary pursuant to Article V and VI. Any written direction of the Investment Fiduciary may be of a continuing nature, but may be revoked in writing by the Investment Fiduciary at any time. The Trustee shall comply with any direction as promptly as possible, provided it does not contravene the terms of the Plan or the provision of any applicable law. The Investment Fiduciary, by written direction, may require the Trustee to obtain written approval of the Investment Fiduciary before exercising such of its powers as may be specified in such direction. Any such direction may be of a continuing nature or otherwise and may be revoked in writing by the Investment Fiduciary at any time. The Trustee shall not be responsible for any loss that may result from the failure or refusal of the Investment Fiduciary to give any such required direction or approval.

Section 4.02 Prohibited Transactions. The Trustee shall not engage in any prohibited transaction within the meaning of the Code and ERISA.

Section 4.03 Legal Actions. The Trustee is authorized to execute all necessary receipts and releases and shall be under the duty to make efforts to collect such sums as may appear to be due (except contributions hereunder); provided, however, that the Trustee shall not be required to institute suit or maintain any litigation to collect the proceeds of any asset unless it has been indemnified to its satisfaction for counsel fees, costs, disbursements and all other expenses and liabilities to which it may in its judgment be subjected by such action. Notwithstanding anything to the contrary herein contained, the Trustee is authorized to compromise and adjust claims arising out of any asset held in the Trust Fund upon such terms and conditions as the Trustee may deem just, and the action so taken by the Trustee shall be binding and conclusive upon all persons interested in the Trust Fund.

Section 4.04 Retention of Advisors. The Trustee, with the consent of the Investment Fiduciary, may retain the services of investment advisors to invest and reinvest the assets of the Trust Fund, as well as employ such legal, actuarial, medical, accounting, clerical and other assistance as may be required in carrying out the provisions of the Plan. The Trustee may also appoint custodians, subcustodians or subtrustees as to part or all of the Trust Fund.

ARTICLE V INSTRUCTIONS

Section 5.01 Reliance on Instructions. Whenever the Trustee is permitted or required to act upon the directions or instructions of the Investment Fiduciary, Plan Administrator or Employer, the Trustee shall be entitled to act in good faith upon any written communication signed by any person or agent designated to act as or on behalf of the Investment Fiduciary, Plan

Administrator or Employer. Such person or agent shall be so designated either under the provisions of the Plan or in writing by the Employer and their authority shall continue until revoked in writing. The Trustee shall incur no liability for failure to act in good faith on such person's or agent's instructions or orders without written communication, and the Trustee shall be fully protected in all actions taken in good faith in reliance upon any instructions, directions, certifications and communications believed to be genuine and to have been signed or communicated by the proper person.

Section 5.02 Designation of Agent.

(1) Employer. The Employer shall notify the Trustee in writing as to the appointment, removal or resignation of any person designated to act as or on behalf of the Investment Fiduciary, Plan Administrator or Employer. After such notification, the Trustee shall be fully protected in acting in good faith upon the directions of, or dealing with, any person designated to act as or on behalf of the Investment Fiduciary, Plan Administrator or Employer until it receives notice to the contrary. The Trustee shall have no duty to inquire into the qualifications of any person designated to act as or on behalf of the Investment Fiduciary, Plan Administrator or Employer.

(2) Trustee. If there is more than one Trustee, the Trustees may designate one or more of the Trustees to act on behalf of the Trustees. Such designated Trustee shall be authorized to take any and all actions and execute and deliver such documents as may be necessary or appropriate.

Section 5.03 Procedures. The Trustee may adopt such rules and procedures as it deems necessary, desirable, or appropriate including, but not limited to: (a) taking action with or without formal meetings; and (b) in the event that there is more than one Trustee, a procedure specifying whether action may be taken by a less than unanimous vote.

Section 5.04 Payment of Benefits. The Trustee shall pay benefits and expenses from the Trust Fund only upon the written direction of the Plan Administrator. The Trustee shall be fully entitled to rely in good faith on such directions furnished by the Plan Administrator, and shall be under no duty to ascertain whether the directions are in accordance with the provisions of the Plan.

ARTICLE VI INVESTMENT OF THE FUND

Section 6.01 Investment Funds. The Investment Fiduciary shall have the exclusive authority and discretion to select the investment funds available for investment under the Plan ("Investment Funds"). In making such selection, the Investment Fiduciary shall use the care, skill, prudence and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims. Subject to the first sentence of Section 6.02, the available investments under the Plan shall be sufficiently diversified so as to minimize the risk of large losses, unless under the circumstances it is clearly prudent not to do so. The Investment Fiduciary shall notify the Trustee in writing of the selection of the Investment Funds currently available for investment under the Plan, and any changes thereto.

Section 6.02 Participant Self-Direction. To the extent permitted by the Plan Administrator, each Participant shall have the right, in accordance with the provisions of the Plan, to direct the investment by the Trustee of all amounts allocated to the separate accounts of the Participant under the Plan among any one or more of the available Investment Funds; provided that during any transition period as may be determined by the Investment Fiduciary, the Investment Fiduciary may direct the investment by the Trustee into the Investment Funds available during such period with respect to which individual Participant's directions shall not have been made or shall not have been permitted to be made under the Plan. All investment directions by Participants shall be timely furnished to the Trustee by the Plan Administrator, except to the extent such directions are transmitted telephonically or otherwise by Participants directly to the Trustee or its delegate in accordance with rules and procedures established and approved by the Plan Administrator and communicated to the Trustee. In making any investment of the assets of the Trust Fund, the Trustee shall be fully entitled to rely on such directions furnished to it by the Plan Administrator or by Participants in accordance with the Plan Administrator's approved rules and procedures, and shall be under no duty to make any inquiry or investigation with respect thereto. If the Trustee receives any contribution under the Plan that is not accompanied by instructions directing its investment, the Trustee shall notify the Plan Administrator of that fact, and the Trustee may, in its discretion, hold all or a portion of the contribution uninvested without liability for loss of income or appreciation pending receipt of proper investment directions.

Section 6.03 Investment Managers.

(1) Appointment of Investment Managers. The Investment Fiduciary may appoint one or more investment managers as described in section 3(38) of ERISA ("Investment Managers") with respect to some or all of the assets of the Trust Fund as contemplated by section 402(c)(3) of ERISA. Any such Investment Manager shall acknowledge to the Investment Fiduciary in writing that it accepts such appointment and that it is an ERISA fiduciary with respect to the Plan and the Trust Fund. The Investment Fiduciary shall provide the Trustee with a copy of the written agreement (and any amendments thereto) between the Investment Fiduciary and the Investment Manager. By notifying the Trustee of the appointment of an Investment Manager, the Investment Fiduciary shall be deemed to certify that such Investment Manager meets the requirements of section 3(38) of ERISA. The authority of the Investment Manager shall continue until the Investment Fiduciary rescinds the appointment or the Investment Manager has resigned.

(2) Separation of Duties. The assets with respect to which a particular Investment Manager has been appointed shall be specified by the Investment Fiduciary and shall be segregated in a separate account for the Investment Manager (the "Separate Account") and the Investment Manager shall have the power to direct the Trustee in every aspect of the investment of the assets of the Separate Account. The Trustee shall not be liable for the acts or omissions of an Investment Manager and shall have no liability or responsibility for acting pursuant to the direction of, or failing to act in the absence of, any direction from an Investment Manager, unless the Trustee knows that by such action or failure to act it would be itself committing a breach of fiduciary duty or participating in a breach of fiduciary duty by such Investment Manager, it being the intention of the parties that each party shall have the full protection of section 405(d) of ERISA.

Section 6.04 Proxies.

(1) Delivery of Information. The Trustee shall deliver, or cause to be delivered, to the Employer or Plan Administrator all notices, prospectuses, financial statements, proxies and proxy soliciting materials received by the Trustee relating to securities held by the Trust or, if applicable, deliver these materials to the appropriate Participant or the Beneficiary of a deceased Participant.

(2) Voting. The Trustee shall not vote any securities held by the Trust except in accordance with the written instructions of the Employer, the Investment Fiduciary, or if otherwise permitted in the Plan, the Participant or the Beneficiary of the Participant, if the Participant is deceased. However, the Trustee may, in the absence of instructions, vote "present" for the sole purpose of allowing such shares to be counted for establishment of a quorum at a shareholders' meeting. The Trustee shall have no duty to solicit instructions from Participants, Beneficiaries, the Investment Fiduciary or the Employer.

(3) Investment Manager. To the extent not delegated to Participants pursuant to subsection (2), the Investment Manager shall be responsible for making any proxy voting or tender offer decisions with respect to securities held in the Separate Account and the Investment Manager shall maintain a record of the reasons for the manner in which it voted proxies or responded to tender offers.

ARTICLE VII
COMPENSATION AND INDEMNIFICATION

Section 7.01 Compensation. The Trustee shall be entitled to reasonable compensation for its services as is mutually agreed upon with the Employer; provided that such compensation does not result in a prohibited transaction within the meaning of the Code and ERISA. If the Trustee and the Employer mutually agree that the Trustee may retain as additional compensation for its services any earnings resulting from the anticipated short-term investment of funds ("float") on Plan assets deposited in or transferred to a Trustee general or omnibus account, then the Trustee shall be authorized to retain such float; provided, that such agreement: (i) discloses the specific circumstances under which float will be earned and retained, (ii) in the case of float on distributions, discloses when the float period commences and ends, and (iii) discloses the rate of the float or the specific manner in which such rate will be determined. If approved by the Plan Administrator, the Trustee shall also be entitled to reimbursement for all direct expenses properly and actually incurred on behalf of the Plan. Such compensation or reimbursement shall be paid to the Trustee out of the Trust Fund unless paid directly by the Employer.

Section 7.02 Indemnification. The Employer shall indemnify and hold harmless the Trustee (and its delegates) from all claims, liabilities, losses, damages and expenses, including reasonable attorneys' fees and expenses, incurred by the Trustee in connection with its duties hereunder to the extent not covered by insurance, except when the same is due to the Trustee's own gross negligence, willful misconduct, lack of good faith, or breach of its fiduciary duties under the Plan or ERISA.

ARTICLE VIII
RESIGNATION AND REMOVAL

Section 8.01 Resignation. The Trustee may resign at any time by written notice to the Plan Administrator which shall be effective 60 days after delivery unless prior thereto a successor Trustee assumes the responsibilities of Trustee hereunder.

Section 8.02 Removal. The Trustee may be removed by the Employer at any time.

Section 8.03 Successor Trustee. The appointment of a successor Trustee hereunder shall be accomplished by and shall take effect upon the delivery to the resigning or removed Trustee, as the case may be, of written notice of the Employer appointing such successor Trustee, and an acceptance in writing of the office of successor Trustee hereunder executed by the successor so appointed. Any successor Trustee may be either a corporation authorized and empowered to exercise trust powers or one or more individuals. All of the provisions set forth herein with respect to the Trustee shall relate to each successor Trustee so appointed with the same force and effect as if such successor Trustee had been originally named herein as the Trustee hereunder. If within 45 days after notice of resignation shall have been given under the provisions of this Article a successor Trustee shall not have been appointed, the resigning Trustee or the Employer may apply to any court of competent jurisdiction for the appointment of a successor Trustee.

Section 8.04 Transfer of Trust Fund. Upon the appointment of a successor Trustee, the resigning or removed Trustee shall transfer and deliver the Trust Fund to such successor Trustee, after reserving such reasonable amount as it shall deem necessary to provide for its expenses in the settlement of its account, the amount of any compensation due to it and any sums chargeable against the Trust Fund for which it may be liable. If the sums so reserved are not sufficient for such purposes, the resigning or removed Trustee shall be entitled to reimbursement for any deficiency from the Employer.

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IN WITNESS WHEREOF, the parties have caused this Trust to be executed this _____ day of _____, 2022.

GREAT VALLEY ACADEMY:

Signature: _____

Print Name: _____

Title/Position: _____

TRUSTEE:

the Governing Board of Great Valley Academy

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Great Valley Academy

CDS Code: 50-10504-0117457

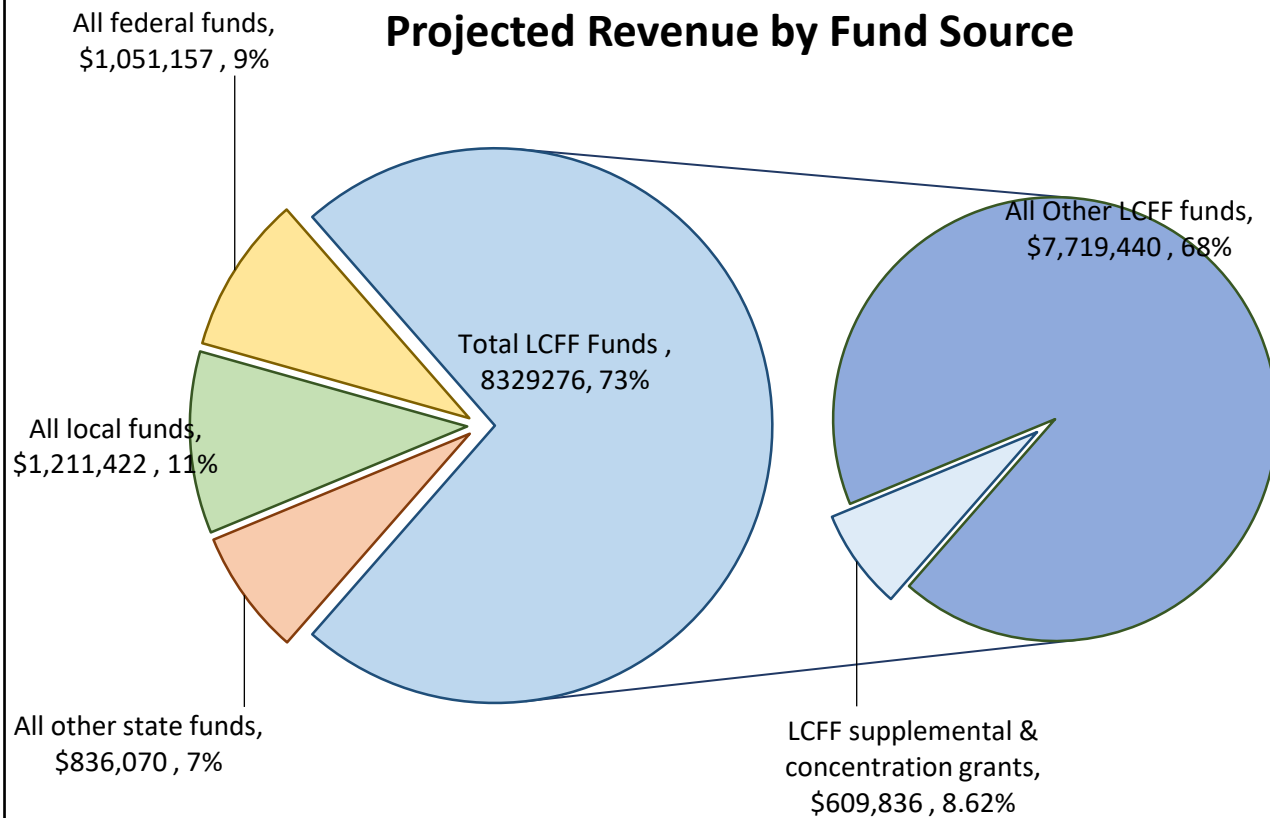
School Year: 2022 – 23

LEA contact information: Tom Anderson, CEO/Superintendent t.anderson@greatvalleyacademy.com

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2022 – 23 School Year

Projected Revenue by Fund Source

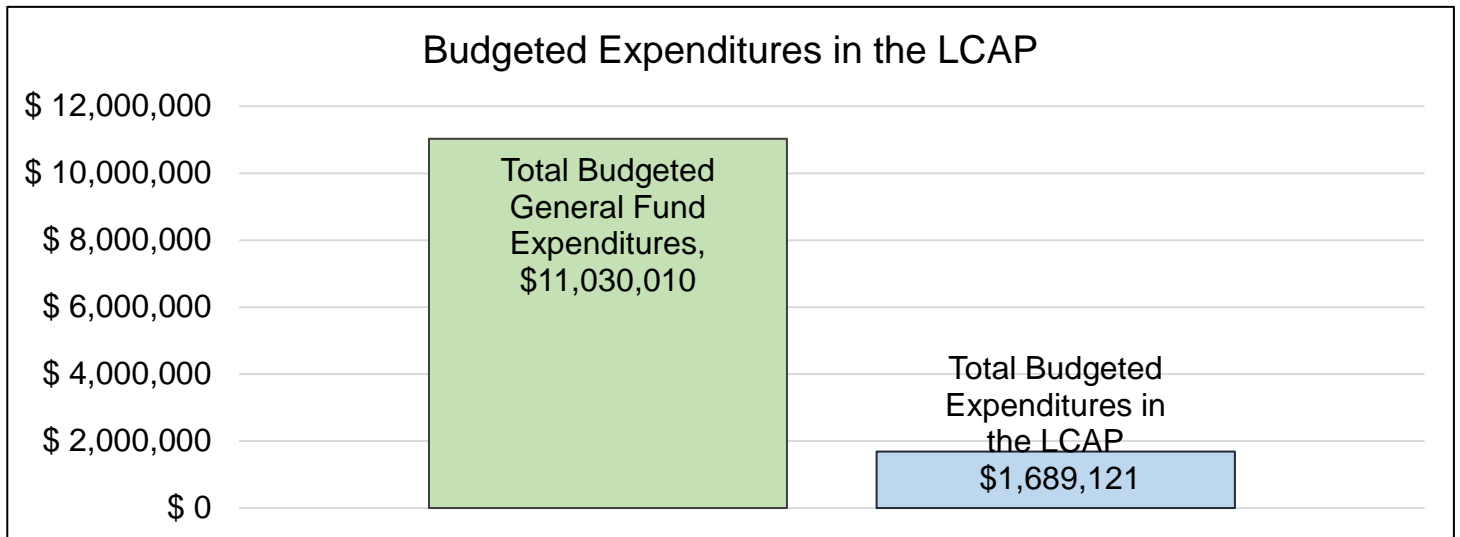


This chart shows the total general purpose revenue Great Valley Academy expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Great Valley Academy is \$11,427,925.00, of which \$8,329,276.00 is Local Control Funding Formula (LCFF), \$836,070.00 is other state funds, \$1,211,422.00 is local funds, and \$1,051,157.00 is federal funds. Of the \$8,329,276.00 in LCFF Funds, \$609,836.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Great Valley Academy plans to spend for 2022 – 23. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Great Valley Academy plans to spend \$11,030,010.00 for the 2022 – 23 school year. Of that amount, \$1,689,121.00 is tied to actions/services in the LCAP and \$9,340,889.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

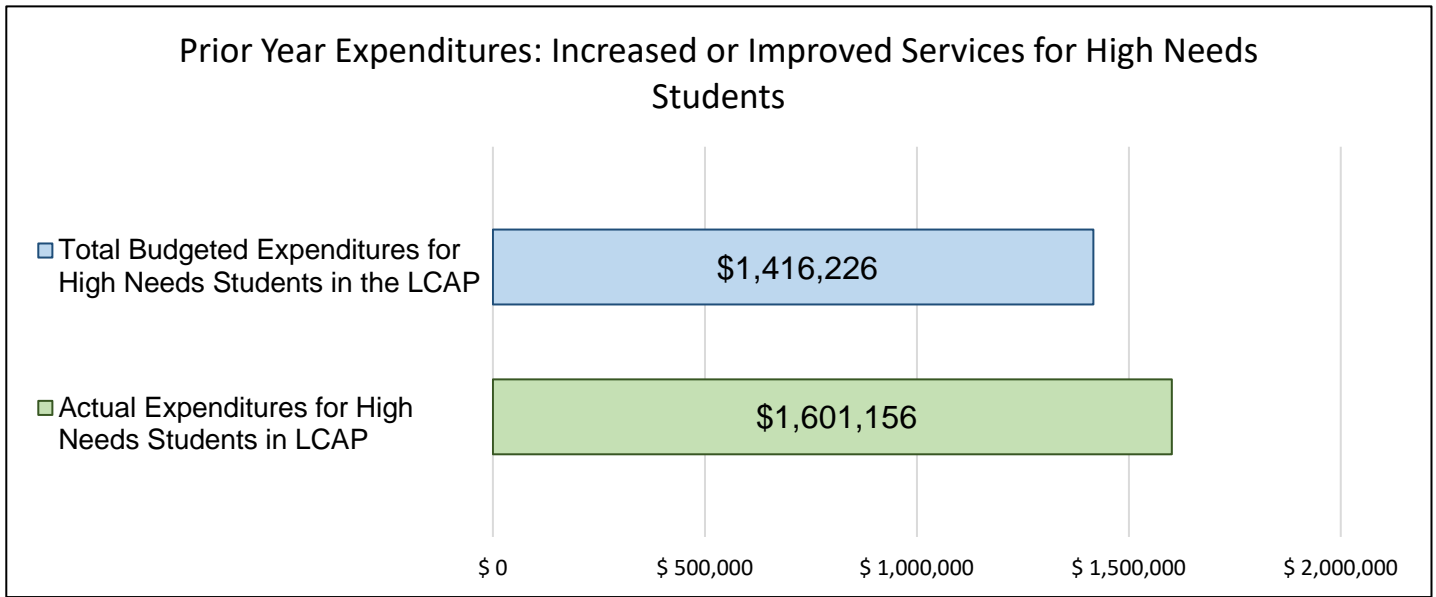
The majority (74%) of our budgeted expenditures are personnel related (certificated, classified salaries and benefits). Other expenses include supplies (curriculum, instructional resources), facilities (building, grounds) and outside services (specialized student services, annual audit, etc.).

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

In 2022 – 23, Great Valley Academy is projecting it will receive \$609,836.00 based on the enrollment of foster youth, English learner, and low-income students. Great Valley Academy must describe how it intends to increase or improve services for high needs students in the LCAP. Great Valley Academy plans to spend \$664,171.00 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2021 – 22



This chart compares what Great Valley Academy budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Great Valley Academy estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021 – 22, Great Valley Academy's LCAP budgeted \$1,416,226.00 for planned actions to increase or improve services for high needs students. Great Valley Academy actually spent \$1,601,156.00 for actions to increase or improve services for high needs students in 2021 – 22.

Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. We continue to use these formats to communicate and solicit input on what's working, what's not working and what additional supports/resources would be most impactful.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Not Applicable, our number of unduplicated pupils is less than 55%.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. In the current school year, we facilitated one educational partner survey in October and will facilitate an additional survey in the spring. We continue to use these formats to communicate and solicit input on what's working, what's not working and what additional supports/resources would be most impactful.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

GVA is using these and other funds to:

- *provide character education and supports
- *provide mental health services to students
- *provide additional in class academic and social emotional supports

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

GVA continues to use fiscal resources in support of students:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping students in class
- *additional in class and out of class academic and social emotional supports
- *access to mental health services
- *expanding access to take home reading (more books!)
- *dedicated resources in support of English learners, student with exceptional needs, students experiencing socioeconomic challenges, foster youth and students experiencing homelessness
- *free breakfast and lunch for all students

GVA continues to use fiscal resources in support of staff:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping staff at work
- *access to mental health services
- *provision of new teacher support (dedicated resources)

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

Modesto LCAP Outcome & Expenditure Supplement 2021.2022

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
CAASPP ELA 2019	47% meet/exceed standards	Not applicable 2021
CAASPP Math 2019	37% meet/exceed standards	Not applicable 2021
NWEA-MAP 2021 Math	71% made growth	Not yet available
NWEA-MAP 2021 Reading	64% made growth	Not yet available
NWEA-MAP 2021 Language	64% made growth	Not yet available
ELPAC 2019 English learners making progress towards proficiency	68% made progress towards proficiency	Not yet available
EL Reclassification rate 2019	28% of English learners will be reclassified	Not yet available

Metric	Baseline	Mid-Year 1 Outcome
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.8	Not yet available
Teacher misassignment rate	0% for charter schools	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.92	Not yet available
Implementation of English language development standards-Academic self-reflection tool 2021	Average rating of items 1-3 (ELD only) 3.00	Not yet available
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not yet available

Actions

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$25,000	\$52,865
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	\$1,125
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	\$84,377
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$277,630	\$94,578
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use	\$25,000	\$5,092
6	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$62,800	\$26,616
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	\$500
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$46,600	\$19,789
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$10,000	\$0

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$249,900	\$113,153
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$369,800	\$178,171

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
Attendance rate-2019	94.9%	96.2% 2020-2021
Chronic absenteeism rate-2019	8.1%	9.8% 2020-2021
Suspension rate-2019	2.1%	.1% 2020-2021
Expulsion rate-2019	0%	0% 2020-2021
Jr. High dropout rate-2019	0%	0% 2020-2021
Parents report feeling welcome on campus-2021 family survey	94%	Not yet available
Parents report child is happy to come to school always/most of the time -2021 family survey	97%	Not yet available
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	87%	Not yet available
Parents are engaged- Parent Engagement Self Reflection Tool 2021	Average = 3.4	Not yet available

Actions

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	\$0
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	\$4,200
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$52,000	\$20,510
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$49,000	\$19,585
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$73,350	\$33,470
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$80,600	\$55,957
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$50,973	\$26,004

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy	Tom Anderson, CEO/Superintendent	t.anderson@greatvalleyacademy.com 209.576.2283

Plan Summary 2022.2023

General Information

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

Great Valley Academy Modesto (GVA) campus serves over 800 K-8 students. We are located in Modesto California, Stanislaus County and are authorized by the Stanislaus County Office of Education. This year (2021-2022) we are completing our 14th year of serving families in our community.

GVA's student population at Fall 1 2021-2022 consisted of approximately 11% English learners, 8% students with disabilities and 38% socioeconomically disadvantaged students. GVA solicits annual input in the form of surveys, from our various stakeholder groups: parents/families, students and staff. We analyze the data and use it to drive student and staff support as well as continuous improvement. The data gathered used to inform and facilitate our annual planning and the Local Control and Accountability Plan.

Vision Statement

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

Mission Statement

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills, and positive character traits to achieve their greatest potential.

Five Foundational Pillars

1. Great Valley Smart (GVS®)

GVA trains the brain to unlock gifted learning through visual and movement skills.

2. Character Development

GVA equips students to become caring and responsible through choice theory, character reflection and assessment.

3. Climate: Safe/Loved/Learning

GVA nurtures a sense of community where everyone is safe, loved and learning.

4. Mastery Learning

GVA empowers students to influence the pace and content of their academic experience by demonstrating mastery.

5. Highly Qualified and Dedicated Staff

GVA develops a highly qualified team through extensive and interactive hiring practices and continuous professional growth.

GVA's program uses our Vision, Mission and Pillars to facilitate our solid character development, positive school climate and positive academic progress

Reflections: Successes

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

There is no Dashboard data to report for this year's LCAP.

This year's NWEA MAP results, English learners making progress towards proficiency and reclassification rates were positive (particularly as we continue to navigate the pandemic impacts).

NWEA-MAP 2022

Math-79.7% of students tested made growth

Reading-69.8% of students tested made growth

Language-78.3% of students tested made growth

Math-91.3% of English learners tested made growth

Reading-73.9% of English learners tested made growth

Language-72.7% of English learners tested made growth

Math-84.9% of socioeconomically disadvantaged students tested made growth

Reading-67.8% of socioeconomically disadvantaged students tested made growth

Language-76.1% of socioeconomically disadvantaged students tested made growth

ELPAC 2021-84.6% of English learners made progress towards proficiency

EL Reclassification 2021-24.3% of English learners were reclassified

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

There is no Dashboard data to report for this year’s LCAP.

There are a few areas that we will continue to monitor in areas of local data (these are direct impacts of the pandemic):

- Decrease in the percentage of students feeling safe on campus
- Decrease in the percentage of parents feeling welcome on campus
- Increase in chronic absenteeism

Ongoing Covid positivity, isolation and quarantine requirements for students & staff contributed to both the decrease in students feeling safe on campus and the increase in chronic absenteeism.

Protocol that limited visitors on campus, prohibited parents from being on campus until late in the school year, which directly contributed to parents feeling “less” welcome on campus.

We are confident that as we exit pandemic protocols, increase parent access on campus and return to more typical GVA ways (parent volunteers in classrooms, field trips, community building events, regular onsite parent meetings, etc.) that these indicators will improve.

LCAP Highlights

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

Great Valley Academy’s LCAP process included reflections from the past year’s pandemic related impacts, current year data, reflections on successes/challenges and stakeholder input. The biggest change from our past LCAPs is our expanded investment for students social emotional and mental health, this is a critical foundational component as we move into the post pandemic academic environment.

Continued investment in teacher support, professional development, standards aligned materials and an increased investment in staff supporting English learner growth will facilitate progress towards our academic goals.

Combining both of these goal areas will allow GVA the opportunity to impact students and staff in our areas of focus.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not applicable

Support for Identified Schools

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

Not applicable

Monitoring and Evaluating Effectiveness

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

Not applicable

Engaging Educational Partners

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

At GVA we are in ongoing dialogue with our staff, parents/families and students. Community and relationship are at the core of who we are as a school, and the connections we make on a regular basis with our educational partners is a testament to that core. Our site administrators are in authentic contact with both staff and students on a daily basis; in person, by phone or email (whichever is the most appropriate mode of communication for the contact). Parents can, and do, connect with our teachers and site administrators in person at drop off/pick up, via email or phone. GVA has many points of contact where informal input and information is gathered, and shared within the administrative team, site leadership team as well as the multi-campus leadership team.

Pre-pandemic (we plan to return to this practice in 2022-2023), we hosted in-person parent/family meetings on a regular basis, the purposes of this meeting are to connect, to hear what is at top of mind for parents and to solicit input on school related topics.

Annually, we solicit input via an easily accessible survey to capture data on what is important to the various stakeholder groups, and ideas for improvement. In the past 2 school years, we have conducted multiple surveys per year to help facilitate next steps in returning students to school in a safe manner, keeping them in school and to obtain input on what’s working, what can be improved and what supports students most need. This year for the first time, GVA facilitated focus groups with families to create a process where direct feedback could be provided to GVA leadership. The process went well, and we were able to have great conversations, as well as obtain honest feedback from families.

GVA wholeheartedly believes in the power of community and relationships, and finds ways to incorporate stakeholder input as we move through the school year.

A summary of the feedback provided by specific educational partners.

GVA is a charter school, and parents/families have chosen our school for their children’s education. The top reasons for choosing GVA are: the sense of community, smaller class sizes, and the child centered perspective (presented in broad categories). Families were also asked to provide input on their level of priority in various areas, with the following sample results:

- Priority to social emotional supports for students (individual and group) 56%
- Priority to afterschool social emotional support groups 38%
- Priority to mental health services for students (individual and group) 70%
- Priority to afterschool mental health support groups 28%
- Priority to additional academic supports for students (individual and group) 47%
- Priority to afterschool tutoring 45%

Ensure facilities are in good repair 100%

Ensure qualified teachers 100%

Maintain a positive school climate 99%

Ensure access to quality instructional materials 99%

Families were asked how we can better serve our English learners, the top responses are: more support through afterschool programs, in class differentiation and the provision of training/resources to teachers.

Families were asked how we can better serve our students qualifying for free/reduced lunch, the top responses are: free meals (breakfast/lunch) for all students, hot food option and better food/more choices.

Families were asked how we can better serve our students with special needs; the top responses are: appropriate individual/group support, and more training for teachers/staff.

GVA staff were also asked to provide input on their level of priority in various areas, with the following sample results:

Priority to social emotional supports for students (individual and group) 100%

Priority to afterschool social emotional support groups 69%

Priority to mental health services for students (individual and group) 100%

Priority to afterschool mental health support groups 56%

Priority to additional academic supports for students (individual and group) 100%

Priority to afterschool tutoring 67%

Ensure facilities are in good repair 87%

Ensure qualified teachers 93%

Ensure access to quality instructional materials 97%

Staff were asked how we can better serve our English learners, the top responses are: more bilingual staff, tutoring and differentiation.

Staff were asked how we can better serve our students qualifying for free/reduced lunch, the top responses are: free meals (breakfast/lunch) for all students, hot food option, and better food/more options.

Staff were asked how we can better serve our students with special needs; the top responses are: more teacher/staff training to support students in class.

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

Educational partner input is reflected upon throughout the LCAP process and development, GVA’s focus on a student-centered philosophy coupled with the incorporation of educational partner input led to the development of the current LCAP.

Particular areas influenced by stakeholder input in this year’s LCAP include:

- Social emotional supports for students (maintain, possibly add afterschool group)
- Mental health supports for students (maintain, possibly add afterschool group)
- Academic supports for students (maintain, continue/expand tutoring options)
- English learner support (maintain, continue with training (expand), possibly add EL tutoring option)
- Nutrition services support (maintain current access, investigate hot lunch/food choice options)
- Students with special needs support (maintain, continue/expand training)
- Qualified teacher support (continue investment and support in newest teachers)

The priorities identified by the majority of educational partners were aligned, providing GVA the opportunity to address the top priorities communicated by our partners.

Goals and Actions

Goal

Goal #	Description
1	<p>By maintaining our facilities, investing in qualified teachers, providing access to standards aligned materials and providing academic centered supports, Great Valley Academy creates a safe environment providing quality education through positive learning experiences, facilitated by highly qualified personnel.</p> <p>By providing academic supports (intervention, resource, English learner) resources and staff professional development as outlined in our actions, we anticipate seeing gains of 2% in each of the following metrics by the end of 2023-2024: CAASPP ELA & Math, NWEA-MAP Math, Reading and language.</p> <p>This broad goal is in support of state priorities 1, 2, 4, 7, 8</p>

An explanation of why the LEA has developed this goal.

GVA develops goals in a multifaceted manner: based on past successes, reflection on past challenges and stakeholder input. Given that we are in the process of completing the most difficult period in the history of education, we will rely on some tried and true actions/processes that provide for safety, investing in teacher support and strengthening academic supports for our students.

Moving through the current academic year, we are using observation and assessment data to determine realistic academic goals for the upcoming LCAP period. Using local assessments, NWEA-MAP and CAASPP data, we will monitor progress throughout each academic year and refine actions as applicable.

GVA has created a combination of actions in support of goal 1 that will provide GVA staff the environment to support students and for students to make academic progress in the next three years.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA 2019	47% meet/exceed standards	Not applicable	[Insert outcome here]	[Insert outcome here]	49% meet/exceed standards
CAASPP Math 2019	37% meet/exceed standards	Not applicable	[Insert outcome here]	[Insert outcome here]	39% meet/exceed standards

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
NWEA-MAP 2021 Math	71% made growth	2022 79.7% made growth	[Insert outcome here]	[Insert outcome here]	73% made growth
NWEA-MAP 2021 Reading	64% made growth	2022 69.8% made growth	[Insert outcome here]	[Insert outcome here]	66% made growth
NWEA-MAP 2021 Language	64% made growth	2022 78.3% made growth	[Insert outcome here]	[Insert outcome here]	66% made growth
ELPAC 2019 English learners making progress towards proficiency	68% made progress towards proficiency	2021 84.6% made progress	[Insert outcome here]	[Insert outcome here]	70% made progress towards proficiency
EL Reclassification rate 2019	28% of English learners will be reclassified	2021 24.3% were reclassified	[Insert outcome here]	[Insert outcome here]	31% of English learners will be reclassified
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.8	2022 Average-item 2 4.25	[Insert outcome here]	[Insert outcome here]	Average-item 2 4.0
Teacher misassignment rate	0% for charter schools	2021 CALSAAS data 2.1%	[Insert outcome here]	[Insert outcome here]	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC	[Insert outcome here]	[Insert outcome here]	Rating Good or better per annual SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.92	2022 Average rating of items 1-3 (excluding ELD) 3.94	[Insert outcome here]	[Insert outcome here]	Average rating of items 1-3 (excluding ELD) 4.25
Implementation of English language development standards-Academic	Average rating of items 1-3 (ELD only) 3.00	2022 Average rating of items 1-3 (ELD only) 3.00	[Insert outcome here]	[Insert outcome here]	Average rating of items 1-3 (ELD only) 3.50

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
self-reflection tool 2021					
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not applicable	[Insert outcome here]	[Insert outcome here]	Dashboard local indicator-Met

Actions

Action #	Title	Description	Total Funds	Contributing
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$45,000	N
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	N
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	N
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$205,000	Y
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use	\$45,000	Y
6	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$62,800	N

Action #	Title	Description	Total Funds	Contributing
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	N
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$143,563	Y
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$75,000	Y
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$249,900	N
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$369,800	N

Goal

Goal #	Description
2	<p>By providing and maintaining a safe, welcoming environment, creating family friendly events, opportunities for connection and communication, social emotional supports, mental health supports, access to onsite meals, as well as staff supports, Great Valley Academy creates a family friendly environment where ongoing communication is facilitated and access to student centered supports are prioritized.</p> <p>By providing student supports (social emotional, mental health, onsite meals), opportunities for families to gather on campus, and support provided by staff, as outlined in our actions, we anticipate maintaining the rate of parents feeling welcome, children wanting to come to school, as well as an increase in parent engagement and students feeling safe on campus. This will allow GVA to maintain attendance at 95%, decrease chronic absenteeism by .5 %, and decrease suspension rate by .1%.</p> <p>This broad goal is in support of state priorities 3, 5, 6</p>

An explanation of why the LEA has developed this goal.

GVA develops goals in a multifaceted manner: based on past successes, reflection on past challenges and stakeholder input. Given that we are in the process of completing the most difficult period in the history of education, we will rely on some tried and true actions/processes that provide for safety, as well as adding mental health support and retaining a high level of social emotional support for our students.

Using local data, we will monitor metric progress throughout each academic year and refine actions as applicable.

GVA has created a combination of actions in support of goal 2 that will provide GVA students and families with a safe, welcoming and engaging environment to support our child centered model, which also provides the foundation for students to make academic progress in the next three years.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Attendance rate-2019	94.9%	2020.2021 96.2%	[Insert outcome here]	[Insert outcome here]	Maintain 95%
Chronic absenteeism rate-2019	8.1%	2020.2021 9.8%	[Insert outcome here]	[Insert outcome here]	7.6%
Suspension rate-2019	2.1%	2020.2021 .1%	[Insert outcome here]	[Insert outcome here]	2%
Expulsion rate-2019	0%	2020.2021 0%	[Insert outcome here]	[Insert outcome here]	0%
Jr. High dropout rate-2019	0%	2020.2021 0%	[Insert outcome here]	[Insert outcome here]	0%
Parents report feeling welcome on campus-2021 family survey	94%	2022 89.7%	[Insert outcome here]	[Insert outcome here]	Maintain 90%
Parents report child is happy to come to school always/most of the time -2021 family survey	97%	2022 97%	[Insert outcome here]	[Insert outcome here]	Maintain 90%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	87%	2022 84.7%	[Insert outcome here]	[Insert outcome here]	Maintain 90%
Parents are engaged- Parent Engagement Self Reflection Tool 2021	Average = 3.4	2022 Average = 3.42	[Insert outcome here]	[Insert outcome here]	Average = 3.8

Actions

Action #	Title	Description	Total Funds	Contributing
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	N
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	N
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$60,000	Y
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$53,000	Y
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$73,350	N
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$80,600	N
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$82,608	Y

Goal Analysis for 2021.2022

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

While there were no substantive differences in planned actions and implementation of planned actions, we did face some ongoing challenges with components of various plan areas. For example, we experienced staffing shortages at various times of the year due to Covid protocol related absences, we experienced the same absence challenge with some contracted service providers, and were impacted to supply chain challenges (inability to obtain some items, ongoing delays in receiving other items).

While these did not create substantive differences, they did create a less stable environment for service provision for our students. As we exit pandemic protocols and the ongoing impacts of Covid begin to subside, we are hopeful that staffing shortages will become more manageable, and we have gained much insight into purchasing in the context of ongoing supply chain challenges.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Material differences between budgeted and estimated actual expenditures occurred in the following action areas:
Access to CCSS aligned materials, higher than budgeted amount due to increased need and cost for instructional resources
Access to intervention opportunities in reading and math, lower than budgeted amount due to lower than anticipated staffing costs
Annual NWEA-MAP assessment costs, higher than budgeted amount due to increased cost
Maintenance of facilities, lower than budgeted amount due to lower than anticipated staffing costs (periodic staffing vacancies)
Onsite social emotional support and mental health support costs, lower than budgeted amount due to lower than anticipated sub-contracted service costs
Maintain an onsite school nutrition program, higher than budgeted amount due to increased program needs (staffing costs)

The variance in planned percentage of improved service expenditures and estimated actual percentage of improved service expenditures are driven by the above noted variances in budgeted expenditures and estimated actual expenditures.

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

We are confident that the shortfalls occurring in meeting some of our metrics, were driven by pandemic related impacts. The various protocols and the continued Covid impacts on students and staff, impacted in our ability to meet defined metrics. We are confident that over time, as we ascertain a more nuanced understanding of these impacts and will use that understanding to make necessary adjustment to goals, actions, metrics or desired outcomes.

For goal 1, we assessed the effectiveness of our actions based on year 1 actual performance, compared to baseline, and met or exceeded baseline in 8/10 applicable metrics. The investment in our teachers, staff, professional development, instructional resources/assessments,

academic supports, increased access to reading materials and targeted supports are the foundation upon which we continue to build in support of goal 1 and attaining the corresponding desired outcomes.

For goal 2, we assessed the effectiveness of our actions based on year 2 actual performance, compared to baseline, and met or exceeded baseline in 6/9 applicable metrics. Ongoing Covid positivity, isolation and quarantine requirements for students & staff contributed to both the decrease in students feeling safe on campus and the increase in chronic absenteeism.

Protocol that limited visitors on campus, prohibited parents from being on campus until late in the school year, which directly contributed to parents feeling “less” welcome on campus.

We are confident that as we exit pandemic protocols, increase parent access on campus and return to more typical GVA ways (parent volunteers in classrooms, field trips, community building events, regular onsite parent meetings, etc.) that these indicators will improve.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

There are no changes to the planned goal, metrics, desired outcomes or actions for the coming year included in the 2022.2023 LCAP.

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students for [LCAP Year]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$609,836	\$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
7.9%	.72%	\$54,335	8.62%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

Great Valley Academy will receive an estimated \$609,836 in LCFF supplemental grant funds. GVA is expending the LCFF supplemental grant funds as determined by the school's goals, in support of California's 8 priority areas.

GVA's student unduplicated pupil count at Fall 1 2021-2022 consisted of approximately 11% English learners, and 38% socioeconomically disadvantaged students. In addition to using the lens of serving our unduplicated pupil groups in our school wide decision making, GVA solicits annual input in the form of surveys, from our various stakeholder groups: parents/families, students and staff. We analyze the data and use it to drive student and staff support as well as continuous improvement. The data gathered used to inform and facilitate our annual planning and the Local Control and Accountability Plan.

All of the actions and services contained in this LCAP are being implemented on a LEA/School wide basis. Those principally directed towards our foster youth, English learners and socioeconomically disadvantaged students are as follows:

Access to intervention opportunities in reading and math: provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners

Expanded access to take home reading materials: provide additional books for classroom libraries and connecting room to increase access to books for at home use

Targeted supports for English learners and socioeconomically disadvantaged students Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.

Resources and professional development supporting further implementation of ELD standards: English Language Development (ELD) focused instructional resources and professional development

Provide students with access to onsite support services (social emotional support): provide onsite social emotional support, subcontracted student assistance specialist services

Provide students with access to onsite support services (mental health support) : provide onsite mental health support, subcontracted mental health clinician

Maintain an onsite school nutrition program: maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs

Provide additional administrative support: provide for additional site based administrative support for students (portion of salary + benefits)

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

The increase in proportionality for foster youth, English learners, and socioeconomically disadvantaged students is at 8.62%.

The use of LCFF grant fund dollars in supporting basic school operations, building school/staff capacity, improvement and expansion of instructional/technological resources, targeted parent outreach, provision of intervention services, student support services and free/reduced price lunches, effectively meet the needs of our unduplicated pupil count. Specifically, these services have a direct impact on our unduplicated pupils; we provide students with a quality educational program in a supportive environment, so they are able to make academic improvement. Based on our annual update, analysis of metrics and stakeholder feedback, expending funds on these services is the most effective use of the funds.

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

Not applicable

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	Not applicable	Not applicable
Staff-to-student ratio of certificated staff providing direct services to students	Not applicable	Not applicable

2021–22 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Person	Total Non-personnel
Totals	\$ 1,516,353	\$ -	\$ -	\$ -	1,516,353	\$ 1,317,753	\$ 198,600

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	New teacher support	All	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000
1	2	Professional development-CCSS	All	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000
1	3	Access to Common Core Aligned Materials	All	\$ 100,000	\$ -	\$ -	\$ -	\$ 100,000
1	4	Access to Intervention-Reading & Math	All	\$ 277,630	\$ -	\$ -	\$ -	\$ 277,630
1	5	Expand access to take home reading materials	All	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000
1	6	Maintain Wireless infrastructure and security	All	\$ 62,800	\$ -	\$ -	\$ -	\$ 62,800
1	7	Annual NWEA MAP assessment tools	All	\$ 12,500	\$ -	\$ -	\$ -	\$ 12,500
1	8	Targeted supports for ELL and SED students	All	\$ 46,600	\$ -	\$ -	\$ -	\$ 46,600
1	9	Resources supporting development of ELD standards	All	\$ 10,000	\$ -	\$ -	\$ -	\$ 10,000
1	10	Maintenance of facilities	All	\$ 249,900	\$ -	\$ -	\$ -	\$ 249,900
1	11	Resource staffing supporting students with special needs	All	\$ 369,800	\$ -	\$ -	\$ -	\$ 369,800
				\$ -	\$ -	\$ -	\$ -	\$ -
2	1	Host parent/family meetings	All	\$ 1,000	\$ -	\$ -	\$ -	\$ 1,000
2	2	Family centered activities	All	\$ 5,000	\$ -	\$ -	\$ -	\$ 5,000
2	3	Provide access to onsite social emotional supports	All	\$ 52,000	\$ -	\$ -	\$ -	\$ 52,000
2	4	Provide access to onsite social emotional supports	All	\$ 49,000	\$ -	\$ -	\$ -	\$ 49,000
2	5	Provide character education to students, teachers, families	All	\$ 73,350	\$ -	\$ -	\$ -	\$ 73,350
2	6	Maintain onsite school nutrition program	All	\$ 80,800	\$ -	\$ -	\$ -	\$ 80,800
2	7	Provide additional administrative support	All	\$ 50,973	\$ -	\$ -	\$ -	\$ 50,973

2021–22 Contributing Actions Table

1. Projected LCF Base Grant	2. Projected LCF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 7,558,627	\$ 590,480	7.81%	0.00%	7.81%	\$ 592,003	0.00%	7.83%	Total: \$ 592,003 LEA-wide Total: \$ 232,773 Limited Total: \$ 359,230 Schoolwide Total: \$ -	
Goal #	Action #	Action Title	Contributing to Improved or Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)	
1	1	New teacher support	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	2	Professional development-CCSS	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	3	Access to Common Core Aligned Materials	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	4	Access to Intervention-Reading & Math	Yes	Limited	All	LEA -wide	\$ 277,630	0.00%	
1	5	Expand access to take home reading materials	Yes	Limited	All	LEA -wide	\$ 25,000	0.00%	
1	6	Maintain Wireless infrastructure and security	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	7	Annual NWEA MAP assessment tools	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	8	Targeted supports for ELL and SED students	Yes	Limited	English Learners and Low-Income	LEA -wide	\$ 46,600	0.00%	
1	9	Resources supporting development of ELD standards	Yes	Limited	English Learners	LEA -wide	\$ 10,000	0.00%	
1	10	Maintenance of facilities	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	11	Resource staffing supporting students with special needs	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	1	Host parent/family meetings	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	2	Family centered activities	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	3	Provide access to onsite social emotional supports	Yes	LEA-wide	All	LEA -wide	\$ 52,000	0.00%	
2	4	Provide access to onsite social emotional supports	Yes	LEA-wide	All	LEA -wide	\$ 49,000	0.00%	
2	5	Provide character education to students, teachers, families	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	6	Maintain onsite school nutrition program	Yes	LEA-wide	All	LEA -wide	\$ 80,800	0.00%	
2	7	Provide additional administrative support	Yes	LEA-wide	All	LEA -wide	\$ 50,973	0.00%	

2021–22 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	\$ 1,516,353.00	\$ 1,524,396.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	New teacher support	No	\$ 25,000	\$ 62,512
1	2	Professional development-CCSS	No	\$ 25,000	\$ 26,712
1	3	Access to Common Core Aligned Materials	No	\$ 100,000	\$ 135,184
1	4	Access to Intervention-Reading & Math	Yes	\$ 277,630	\$ 202,108
1	5	Expand access to take home reading materials	Yes	\$ 25,000	\$ 25,626
1	6	Maintain Wireless infrastructure and security	No	\$ 62,800	\$ 62,847
1	7	Annual NWEA MAP assessment tools	No	\$ 12,500	\$ 14,250
1	8	Targeted supports for ELL and SED students	Yes	\$ 46,600	\$ 46,649
1	9	Resources supporting development of ELD stan	Yes	\$ 10,000	\$ 9,555
1	10	Maintenance of facilities	No	\$ 249,900	\$ 212,429
1	11	Resource staffing supporting students with spec	No	\$ 369,800	\$ 392,257
				\$ -	\$ -
2	1	Host parent/family meetings	No	\$ 1,000	\$ -
2	2	Family centered activities	No	\$ 5,000	\$ 8,478
2	3	Provide access to onsite social emotional suppor	Yes	\$ 52,000	\$ 47,870
2	4	Provide access to onsite social emotional suppor	Yes	\$ 49,000	\$ 44,832
2	5	Provide character education to students, teache	No	\$ 73,350	\$ 73,581
2	6	Maintain onsite school nutrition program	Yes	\$ 80,800	\$ 107,708
2	7	Provide additional administrative support	Yes	\$ 50,973	\$ 51,797

2021-22 Contributing Actions Annual Update Table

6. Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Actual Percentage of Improved Services (%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)	
\$ 590,480	\$ 592,003	\$ 536,145	\$ 55,858	0.00%	0.00%	0.00% - No Difference	
Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1	New teacher support	No	-	-	0.00%	0.00%
1	2	Professional development-CCSS	No	-	-	0.00%	0.00%
1	3	Access to Common Core Aligned Materials	No	-	-	0.00%	0.00%
1	4	Access to Intervention-Reading & Math	Yes	277,630	202,107.93	0.00%	0.00%
1	5	Expand access to take home reading materials	Yes	25,000	25,626.43	0.00%	0.00%
1	6	Maintain Wireless infrastructure and security	No	-	-	0.00%	0.00%
1	7	Annual NWEA MAP assessment tools	No	-	-	0.00%	0.00%
1	8	Targeted supports for ELL and SED students	Yes	46,600	46,649.01	0.00%	0.00%
1	9	Resources supporting development of ELD standards	Yes	10,000	9,555.00	0.00%	0.00%
1	10	Maintenance of facilities	No	-	-	0.00%	0.00%
1	11	Resource staffing supporting students with special needs	No	-	-	0.00%	0.00%
2	1	Host parent/family meetings	No	-	-	0.00%	0.00%
2	2	Family centered activities	No	-	-	0.00%	0.00%
2	3	Provide access to onsite social emotional supports	Yes	52,000	47,869.65	0.00%	0.00%
2	4	Provide access to onsite social emotional supports	Yes	49,000	44,831.73	0.00%	0.00%
2	5	Provide character education to students, teachers, families	No	-	-	0.00%	0.00%
2	6	Maintain onsite school nutrition program	Yes	80,800	107,708.28	0.00%	0.00%
2	7	Provide additional administrative support	Yes	50,973	51,797.29	0.00%	0.00%

2021–22 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$ 7,558,627	\$ 590,480	0.00%	7.81%	\$ 536,145	0.00%	7.09%	\$ 54,334.68	0.72%

Instructions

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[Engaging Educational Partners](#)

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[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

- Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).
- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA’s final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity’s budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA’s diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

Prompt 2: “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated students
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.
- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA’s eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the “All Students” student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

Actions for English Learners: School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs

may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year: Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

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

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

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

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.

- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.

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

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

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

Contributing Actions Table

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

Annual Update Table

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

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

Contributing Actions Annual Update Table

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

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

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

LCFF Carryover Table

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

Calculations in the Action Tables

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

Contributing Actions Table

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

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

Contributing Actions Annual Update Table

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

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

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

LCFF Carryover Table

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

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Great Valley Academy Salida

CDS Code: 50-71266-0124768

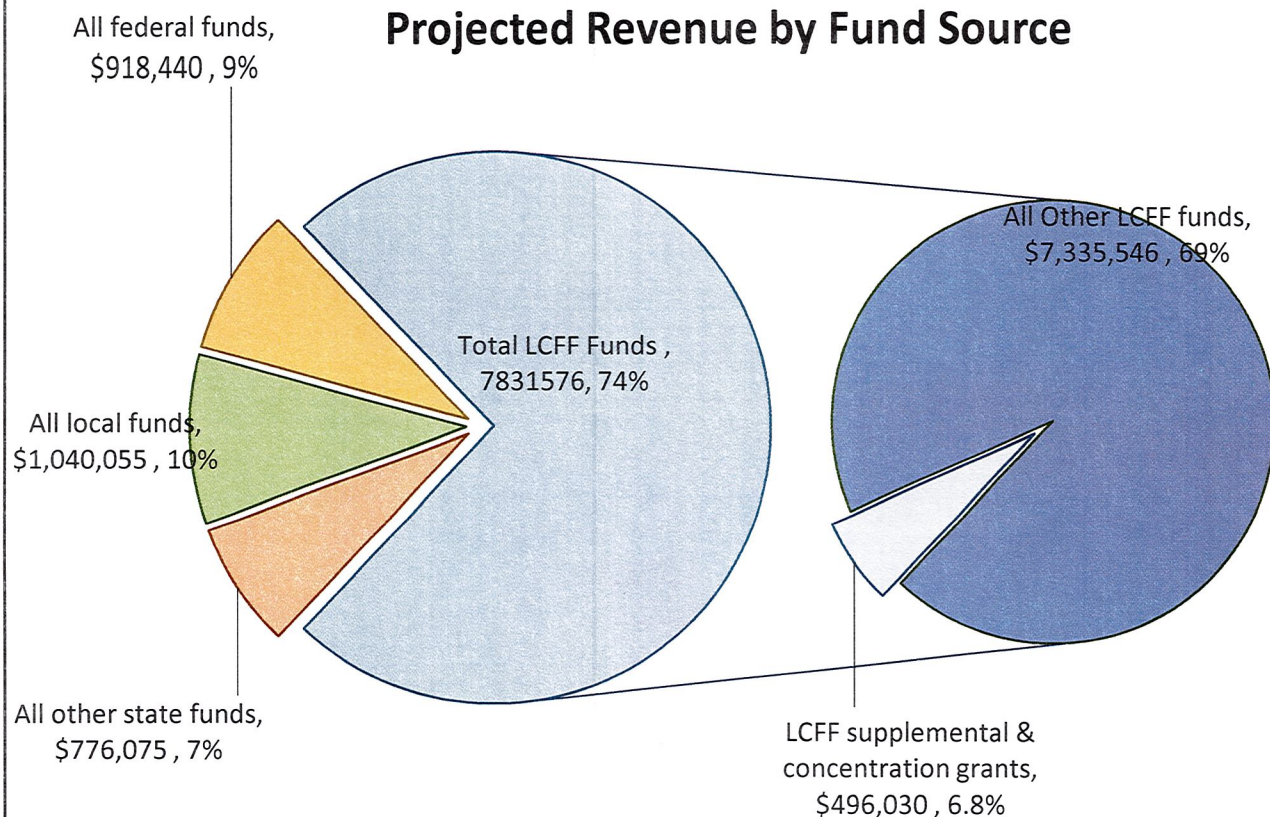
School Year: 2022 – 23

LEA contact information: Tom Anderson, CEO/Superintendent t.anderson@greatvalleyacademy.com

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2022 – 23 School Year

Projected Revenue by Fund Source

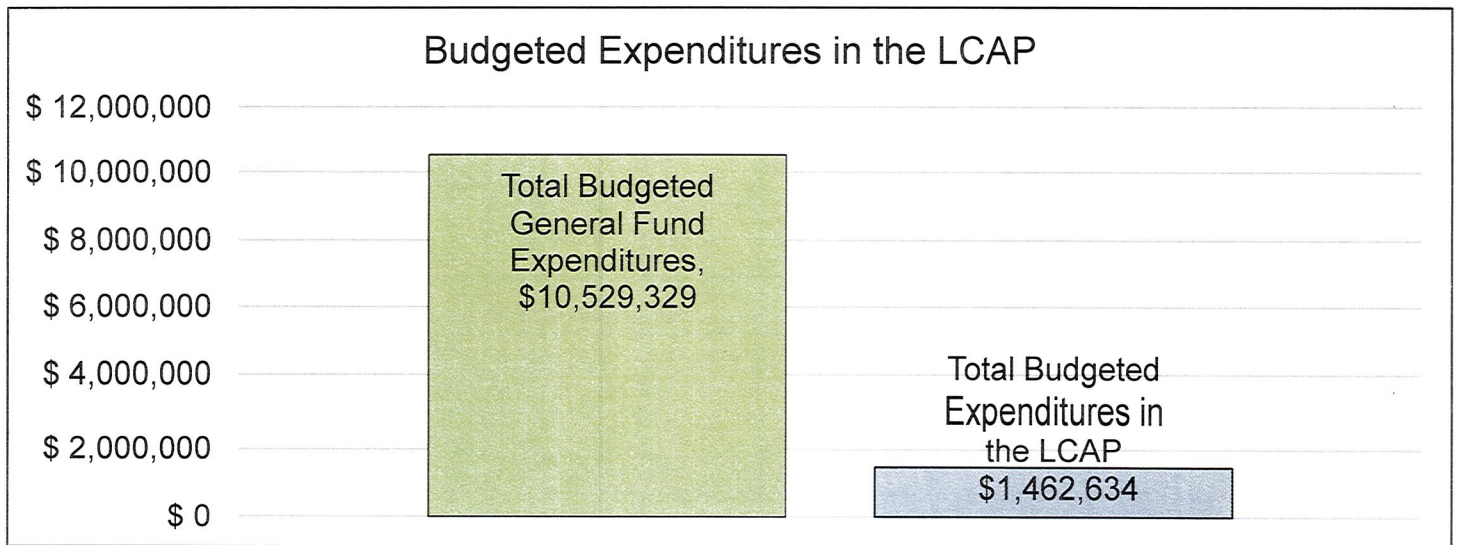


This chart shows the total general purpose revenue Great Valley Academy Salida expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Great Valley Academy Salida is \$10,566,146.00, of which \$7,831,576.00 is Local Control Funding Formula (LCFF), \$776,075.00 is other state funds, \$1,040,055.00 is local funds, and \$918,440.00 is federal funds. Of the \$7,831,576.00 in LCFF Funds, \$496,030.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Great Valley Academy Salida plans to spend for 2022 – 23. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Great Valley Academy Salida plans to spend \$10,529,329.00 for the 2022 – 23 school year. Of that amount, \$1,462,634.00 is tied to actions/services in the LCAP and \$9,066,695.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

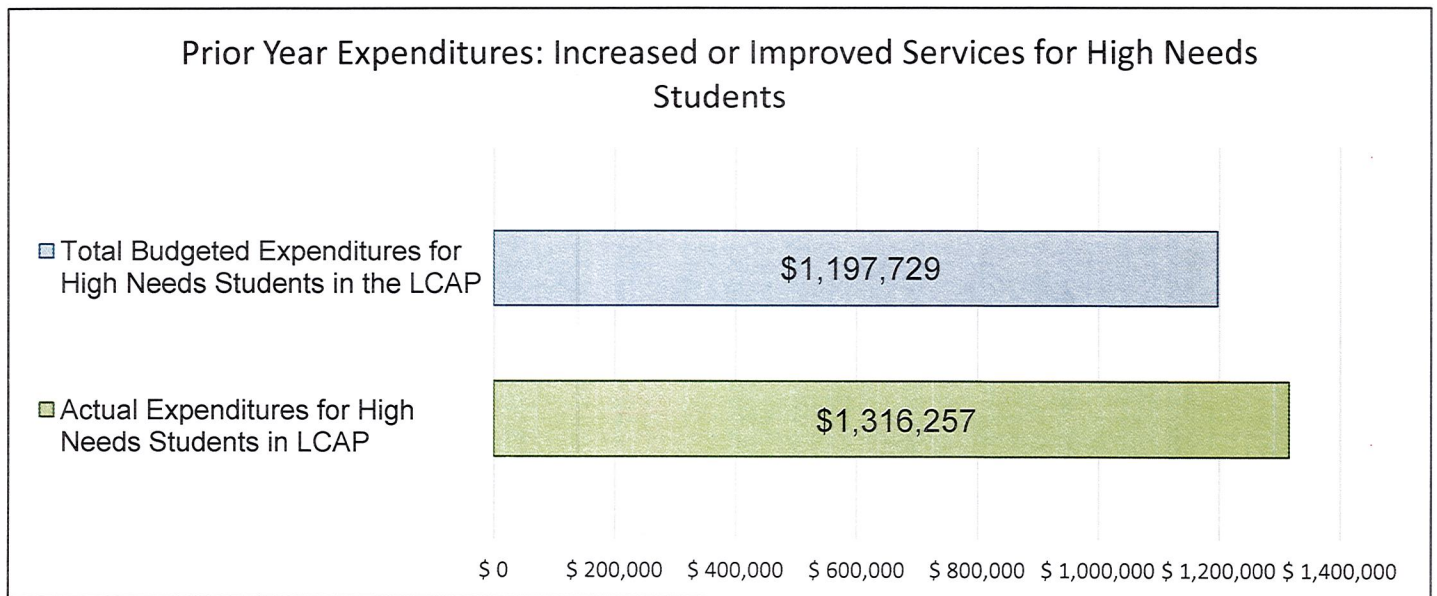
The majority (73%) of our budgeted expenditures are personnel related (certificated, classified salaries and benefits). Other expenses include supplies (curriculum, instructional resources), facilities (building, grounds) and outside services (specialized student services, annual audit, etc.).

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

In 2022 – 23, Great Valley Academy Salida is projecting it will receive \$496,030.00 based on the enrollment of foster youth, English learner, and low-income students. Great Valley Academy Salida must describe how it intends to increase or improve services for high needs students in the LCAP. Great Valley Academy Salida plans to spend \$497,184.00 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2021 – 22



This chart compares what Great Valley Academy Salida budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Great Valley Academy Salida estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021 – 22, Great Valley Academy Salida's LCAP budgeted \$1,197,729.00 for planned actions to increase or improve services for high needs students. Great Valley Academy Salida actually spent \$1,316,257.00 for actions to increase or improve services for high needs students in 2021 – 22.

Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy-Salida	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. We continue to use these formats to communicate and solicit input on what’s working, what’s not working and what additional supports/resources would be most impactful.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Not Applicable, our number of unduplicated pupils is less than 55%.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

GVA has been facilitating surveys and ongoing communication with staff, students and families for more than 5 years. In the current school year, we facilitated one educational partner survey in October and will facilitate an additional survey in the spring. We continue to use these formats to communicate and solicit input on what’s working, what’s not working and what additional supports/resources would be most impactful.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

GVA is using these and other funds to:

- *provide character education and supports
- *provide mental health services to students
- *provide additional in class academic and social emotional supports

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

GVA continues to use fiscal resources in support of students:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping students in class
- *additional in class and out of class academic and social emotional supports
- *access to mental health services
- *expanding access to take home reading (more books!)
- *dedicated resources in support of English learners, student with exceptional needs, students experiencing socioeconomic challenges, foster youth and students experiencing homelessness
- *free breakfast and lunch for all students

GVA continues to use fiscal resources in support of staff:

- *100% in person learning
 - access to onsite and take home Covid 19 testing in support of keeping staff at work
- *access to mental health services
- *provision of new teacher support (dedicated resources)

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy-Salida	Leah Silvestre Franklin, Chief Executive Officer	l.silvestre@greatvalleyacademy.com 209-576-2283

Salida LCAP Outcome & Expenditure Supplement 2021.2022

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
CAASPP ELA 2019	46% meet/exceed standards	Not applicable 2021
CAASPP Math 2019	33% meet/exceed standards	Not applicable 2021
NWEA-MAP 2021 Math	67% made growth	Not yet available
NWEA-MAP 2021 Reading	69% made growth	Not yet available
NWEA-MAP 2021 Language	78% made growth	Not yet available
ELPAC 2019 English learners making progress towards proficiency	49% made progress towards proficiency	Not yet available
EL Reclassification rate 2019	46% of English learners will be reclassified	Not yet available

Metric	Baseline	Mid-Year 1 Outcome
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.6	Not yet available
Teacher misassignment rate	0% for charter schools	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.8	Not yet available
Implementation of English language development standards-Academic self-reflection tool 2021	Average rating of items 1-3 (ELD only) 2.0	Not yet available
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not yet available

Actions/Expenditures

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$25,000	\$43,865
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	\$1,305
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	\$66,203
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$160,000	\$66,777
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use, and part time library staff	\$36,500	\$0
06	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$62,800	\$26,616
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	\$500
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$41,600	\$19,789
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$10,000	\$2,470

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$282,900	\$138,084
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$291,022	\$124,377

Measuring and Reporting Results

Metric	Baseline	Mid-Year 1 Outcome
Attendance rate-2019	95.07%	96.16% 2020-2021
Chronic absenteeism rate-2019	9.1%	9.3% 2020-2021
Suspension rate-2019	2.6%	.1% 2020-2021
Expulsion rate-2019	0%	0% 2020-2021
Jr. High dropout rate-2019	0%	0% 2020-2021
Parents report feeling welcome on campus-2021 family survey	96%	Not yet available
Parents report child is happy to come to school always/most of the time -2021 family survey	95%	Not yet available
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	93%	Not yet available
Parents are engaged- Parent Engagement Self Reflection Tool	Average = 2.9	Not yet available

Actions/Expenditures

Action #	Title	Description	Total Funds	Midyear Expenditures @12.31.22
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	\$0
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	\$1,998
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$52,000	\$18,597
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$49,000	\$19,351
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$39,600	\$16,007
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$46,470	\$42,343
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$47,800	\$23,730

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Great Valley Academy-Salida	Tom Anderson, CEO/Superintendent	t.anderson@greatvalleyacademy.com 209.576.2283

Plan Summary 2022.2023

General Information

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

Great Valley Academy Salida (GVA) campus serves over 800 K-8 students. We are located in Modesto California, Stanislaus County and are authorized by the Salida Union School District. This year (2021-2022) we are completing our 11th year of serving families in our community. GVA's student population at Fall 1 2021-2022 consisted of approximately 9% English learners, 10% students with disabilities and 28% socioeconomically disadvantaged students. GVA solicits annual input in the form of surveys, from our various stakeholder groups: parents/families, students and staff. We analyze the data and use it to drive student and staff support as well as continuous improvement. The data gathered used to inform and facilitate our annual planning and the Local Control and Accountability Plan.

Vision Statement

Great Valley Academies envision thriving communities strengthened by individuals who act with confidence, learn tenaciously, celebrate the differences of others, and positively impact the world around them.

Mission Statement

Great Valley Academies create a safe, loved, learning environment where all students develop foundational thinking skills, and positive character traits to achieve their greatest potential.

Five Foundational Pillars

1. Great Valley Smart (GVS®)
GVA trains the brain to unlock gifted learning through visual and movement skills.
2. Character Development
GVA equips students to become caring and responsible through choice theory, character reflection and assessment.
3. Climate: Safe/Loved/Learning

GVA nurtures a sense of community where everyone is safe, loved and learning.

4. Mastery Learning

GVA empowers students to influence the pace and content of their academic experience by demonstrating mastery.

5. Highly Qualified and Dedicated Staff

GVA develops a highly qualified team through extensive and interactive hiring practices and continuous professional growth.

GVA's program uses our Vision, Mission and Pillars to facilitate our solid character development, positive school climate and positive academic progress

Reflections: Successes

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

There is no Dashboard data to report for this year's LCAP.

This year's NWEA MAP results, English learners making progress towards proficiency and reclassification rates were positive (particularly as we continue to navigate the pandemic impacts).

NWEA-MAP 2022

Math-72.8% of students tested made growth

Reading-64.6% of students tested made growth

Language-55.8% of students tested made growth

Math-72.6% of English learners tested made growth

Reading-72.9% of English learners tested made growth

Language-64.1% of English learners tested made growth

Math-74.4% of socioeconomically disadvantaged students tested made growth

Reading-71.3% of socioeconomically disadvantaged students tested made growth

Language-60.3% of socioeconomically disadvantaged students tested made growth

ELPAC 2021-77.3% of English learners made progress towards proficiency

EL Reclassification 2021-14.8% of English learners were reclassified

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

There is no Dashboard data to report for this year’s LCAP.

There are a few areas that we will continue to monitor in areas of local data (these are direct impacts of the pandemic):
Decrease in the percentage of students feeling safe on campus
Increase in chronic absenteeism

Ongoing Covid positivity, isolation and quarantine requirements for students & staff contributed to both the decrease in students feeling safe on campus and the increase in chronic absenteeism.

Protocol that limited visitors on campus, prohibited parents from being on campus until late in the school year, which directly contributed to parents feeling “less” welcome on campus.

We are confident that as we exit pandemic protocols, increase parent access on campus and return to more typical GVA ways (parent volunteers in classrooms, field trips, community building events, regular onsite parent meetings, etc.) that these indicators will improve.

LCAP Highlights

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

Great Valley Academy’s LCAP process included reflections from the past year’s pandemic related impacts, current year data, reflections on successes/challenges and stakeholder input. The biggest change from our past LCAPs is our expanded investment for students social emotional and mental health, this is a critical foundational component as we move into the post pandemic academic environment.

Continued investment in teacher support, professional development, standards aligned materials and an increased investment in staff supporting English learner growth will facilitate progress towards our academic goals.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not applicable

Support for Identified Schools

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

Not applicable

Monitoring and Evaluating Effectiveness

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

Not applicable

Engaging Educational Partners

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

At GVA we are in ongoing dialogue with our staff, parents/families and students. Community and relationship are at the core of who we are as a school, and the connections we make on a regular basis with our educational partners is a testament to that core. Our site administrators are in authentic contact with both staff and students on a daily basis; in person, by phone or email (whichever is the most appropriate mode of communication for the contact). Parents can, and do, connect with our teachers and site administrators in person at drop off/pick up, via email or phone. GVA has many points of contact where informal input and information is gathered, and shared within the administrative team, site leadership team as well as the multi-campus leadership team.

Pre-pandemic (we plan to return to this practice in 2022-2023), we hosted in-person parent/family meetings on a regular basis, the purposes of this meeting are to connect, to hear what is at top of mind for parents and to solicit input on school related topics.

Annually, we solicit input via an easily accessible survey to capture data on what is important to the various stakeholder groups, and ideas for improvement. In the past 2 school years, we have conducted multiple surveys per year to help facilitate next steps in returning students to school in a safe manner, keeping them in school and to obtain input on what’s working, what can be improved and what supports students most need. This year for the first time, GVA facilitated focus groups with families to create a process where direct feedback could be provided to GVA leadership. The process went well, and we were able to have great conversations, as well as obtain honest feedback from families.

GVA wholeheartedly believes in the power of community and relationships, and finds ways to incorporate stakeholder input as we move through the school year.

A summary of the feedback provided by specific educational partners.

GVA is a charter school, and parents/families have chosen our school for their children’s education. The top reasons for choosing GVA are: the sense of community, smaller class sizes, and the child centered perspective (presented in broad categories). Families were also asked to provide input on their level of priority in various areas, with the following sample results:

- Priority to social emotional supports for students (individual and group) 57%
- Priority to afterschool social emotional support groups 33%
- Priority to mental health services for students (individual and group) 74%
- Priority to afterschool mental health support groups 17%
- Priority to additional academic supports for students (individual and group) 54%
- Priority to afterschool tutoring 29%

Ensure facilities are in good repair 98%

Ensure qualified teachers 100%

Maintain a positive school climate 97%

Ensure access to quality instructional materials 98%

Families were asked how we can better serve our English learners, the top responses are: more support through small groups, after school supports and the provision of training/resources to teachers.

Families were asked how we can better serve our students qualifying for free/reduced lunch, the top responses are: free meals (breakfast/lunch) for all students, hot food option and better food/more choices.

Families were asked how we can better serve our students with special needs; the top responses are: more resource staffing, and more training for teachers/staff.

GVA staff were also asked to provide input on their level of priority in various areas, with the following sample results:

Priority to social emotional supports for students (individual and group) 100%

Priority to afterschool social emotional support groups 65%

Priority to mental health services for students (individual and group) 100%

Priority to afterschool mental health support groups 44%

Priority to additional academic supports for students (individual and group) 100%

Priority to afterschool tutoring 53%

Ensure facilities are in good repair 100%

Ensure qualified teachers 92%

Ensure access to quality instructional materials 100%

Staff were asked how we can better serve our English learners, the top responses are: more staff professional development/training, and small groups/pullout.

Staff were asked how we can better serve our students qualifying for free/reduced lunch, the top responses are: free meals (breakfast/lunch) for all students, hot food option, and better food/more options.

Staff were asked how we can better serve our students with special needs; more resource staffing, retain resource staff and more training for teachers/staff.

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

Educational partner input is reflected upon throughout the LCAP process and development, GVA’s focus on a student-centered philosophy coupled with the incorporation of educational partner input led to the development of the current LCAP.

Particular areas influenced by stakeholder input in this year’s LCAP include:

- Social emotional supports for students (maintain, possibly add afterschool group)
- Mental health supports for students (maintain, possibly add afterschool group)
- Academic supports for students (maintain, continue/expand tutoring options)
- English learner support (maintain, continue with training (expand), possibly add EL tutoring option)
- Nutrition services support (maintain current access, investigate hot lunch/food choice options)
- Students with special needs support (maintain, continue/expand training)
- Qualified teacher support (continue investment and support in newest teachers)

The priorities identified by the majority of educational partners were aligned, providing GVA the opportunity to address the top priorities communicated by our partners.

Goals and Actions

Goal

Goal #	Description
1	<p>By maintaining our facilities, investing in qualified teachers, providing access to standards aligned materials and providing academic centered supports, Great Valley Academy creates a safe environment providing quality education through positive learning experiences, facilitated by highly qualified personnel.</p> <p>By providing academic supports (intervention, resource, English learner) resources and staff professional development as outlined in our actions, we anticipate seeing gains of 2% in each of the following metrics by the end of 2023-2024: CAASPP ELA & Math, NWEA-MAP Math, Reading and language.</p> <p>This broad goal is in support of state priorities 1, 2, 4, 7, 8</p>

An explanation of why the LEA has developed this goal.

GVA develops goals in a multifaceted manner: based on past successes, reflection on past challenges and stakeholder input. Given that we are in the process of completing the most difficult period in the history of education, we will rely on some tried and true actions/processes that provide for safety, investing in teacher support and strengthening academic supports for our students.

Moving through the current academic year, we are using observation and assessment data to determine realistic academic goals for the upcoming LCAP period. Using local assessments, NWEA-MAP and CAASPP data, we will monitor progress throughout each academic year and refine actions as applicable.

GVA has created a combination of actions in support of goal 1 that will provide GVA staff the environment to support students and for students to make academic progress in the next three years.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA 2019	46% meet/exceed standards	Not applicable	[Insert outcome here]	[Insert outcome here]	45% meet/exceed standards
CAASPP Math 2019	33% meet/exceed standards	Not applicable	[Insert outcome here]	[Insert outcome here]	35% meet/exceed standards

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
NWEA-MAP 2021 Math	67% made growth	2022 72.8% made growth	[Insert outcome here]	[Insert outcome here]	69% made growth
NWEA-MAP 2021 Reading	69% made growth	2022 64.6% made growth	[Insert outcome here]	[Insert outcome here]	71% made growth
NWEA-MAP 2021 Language	78% made growth	2022 55.8% made growth	[Insert outcome here]	[Insert outcome here]	80% made growth
ELPAC 2019 English learners making progress towards proficiency	49% made progress towards proficiency	2021 77.3% made progress	[Insert outcome here]	[Insert outcome here]	51% made progress towards proficiency
EL Reclassification rate 2019	46% of English learners will be reclassified	2021 14.8% were reclassified	[Insert outcome here]	[Insert outcome here]	48% of English learners will be reclassified
Access to standards aligned materials-Academic standards self-reflection tool 2021	Average-item 2 3.6	2022 Average-item 2 4.0	[Insert outcome here]	[Insert outcome here]	Average-item 2 4.0
Teacher misassignment rate	0% for charter schools	2021 CALSAAS data 2.04%	[Insert outcome here]	[Insert outcome here]	0% for charter schools
Facilities rated Good or better	Rating Good on 2020 SARC	Rating Good on 2021 SARC	[Insert outcome here]	[Insert outcome here]	Rating Good or better per annual SARC
Implementation of Common Core State Standards-Academic self-reflection tool 2021	Average rating of items 1-3 (excluding ELD) 3.8	2022 Average rating of items 1-3 (excluding ELD) 3.88	[Insert outcome here]	[Insert outcome here]	Average rating of items 1-3 (excluding ELD) 4.0
Implementation of English language development standards-Academic	Average rating of items 1-3 (ELD only) 2.0	2022 Average rating of items 1-3 (ELD only) 2.0	[Insert outcome here]	[Insert outcome here]	Average rating of items 1-3 (ELD only) 3.0

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
self-reflection tool 2021					
Student access & enrollment in all required areas of study-Access to broad course of study self-reflection 2021	Dashboard local indicator-Met	Not applicable	[Insert outcome here]	[Insert outcome here]	Dashboard local indicator-Met

Actions

Action #	Title	Description	Total Funds	Contributing
1	New teacher support	Support new teachers participating in induction process by providing fully paid access to Stanislaus County Office of Education (SCOE) induction program, and by providing onsite support	\$45,000	N
2	Professional development-Common Core State Standards (CCSS)	Provide staff access to standards aligned professional development	\$25,000	N
3	Access to CCSS aligned materials	Continued investment and expansion of CCSS aligned instructional resources	\$100,000	N
4	Access to intervention opportunities in reading and math	Provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners	\$153,300	Y
5	Expanded access to take home reading materials	Provide additional books for classroom libraries and connecting room to increase access to books for at home use	\$57,500	Y
6	Maintain internet infrastructure and security	Provide oversight, maintenance, upgrades as well as support of student/staff devices and online instructional resources	\$65,000	N

Action #	Title	Description	Total Funds	Contributing
7	Annual assessment NWEA-MAP	Annual license cost for NWEA-MAP assessment; for use in planning student instructional objectives and to monitor student growth	\$12,500	N
8	Targeted supports for English learners and socioeconomically disadvantaged students	Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.	\$76,310	Y
9	Resources and professional development supporting further implementation of ELD standards	English Language Development (ELD) focused instructional resources and professional development	\$30,000	Y
10	Maintenance of facilities	Facilities will be maintained to provide a safe learning environment	\$283,000	N
11	Resource staffing in support of students with special needs	Maintain and develop our resource department on support of our students with special needs	\$275,000	N

Goal

Goal #	Description
2	<p>By providing and maintaining a safe, welcoming environment, creating family friendly events, opportunities for connection and communication, social emotional supports, mental health supports, access to onsite meals, as well as staff supports, Great Valley Academy creates a family friendly environment where ongoing communication is facilitated and access to student centered supports are prioritized.</p> <p>By providing student supports (social emotional, mental health, onsite meals), opportunities for families to gather on campus, and support provided by staff, as outlined in our actions, we anticipate maintaining the rate of parents feeling welcome, children wanting to come to school, as well as an increase in parent engagement and students feeling safe on campus. This will allow GVA to maintain attendance at 95%, decrease chronic absenteeism by .5 %, and decrease suspension rate by .1%.</p> <p>This broad goal is in support of state priorities 3, 5, 6</p>

An explanation of why the LEA has developed this goal.

GVA develops goals in a multifaceted manner: based on past successes, reflection on past challenges and stakeholder input. Given that we are in the process of completing the most difficult period in the history of education, we will rely on some tried and true actions/processes that provide for safety, as well as adding mental health support and retaining a high level of social emotional support for our students.

Using local data, we will monitor metric progress throughout each academic year and refine actions as applicable.

GVA has created a combination of actions in support of goal 2 that will provide GVA students and families with a safe, welcoming and engaging environment to support our child centered model, which also provides the foundation for students to make academic progress in the next three years.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Attendance rate-2019	95.07%	2020.2021 96.2%	[Insert outcome here]	[Insert outcome here]	Maintain 95%
Chronic absenteeism rate-2019	9.1%	2020.2021 9.2%	[Insert outcome here]	[Insert outcome here]	8.6%
Suspension rate-2019	2.6%	2020.2021 .1%	[Insert outcome here]	[Insert outcome here]	2.5%
Expulsion rate-2019	0%	2020.2021 0%	[Insert outcome here]	[Insert outcome here]	0%
Jr. High dropout rate-2019	0%	2020.2021 0%	[Insert outcome here]	[Insert outcome here]	0%
Parents report feeling welcome on campus-2021 family survey	96%	2022 95.8%	[Insert outcome here]	[Insert outcome here]	Maintain 90%
Parents report child is happy to come to school always/most of the time -2021 family survey	95%	2022 100%	[Insert outcome here]	[Insert outcome here]	Maintain 90%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Students report feeling safe on campus-2021 student survey (3 rd -8 th)	93%	2022 80.1%	[Insert outcome here]	[Insert outcome here]	Maintain 90%
Parents are engaged- Parent Engagement Self Reflection Tool 2021	Average = 2.9	2022 Average = 3.17	[Insert outcome here]	[Insert outcome here]	Average = 3.3

Actions

Action #	Title	Description	Total Funds	Contributing
1	Host parent/family meetings	Provide supplies, snacks and onsite childcare	\$1,000	N
2	Host family centered activities	Provide supplies, snacks and onsite childcare	\$5,000	N
3	Provide students with access to onsite support services (social emotional support)	Provide onsite social emotional support, subcontracted student assistance specialist services	\$52,000	Y
4	Provide students with access to onsite support services (mental health support)	Provide onsite mental health support, subcontracted mental health clinician	\$49,000	Y
5	Provide character education to students, teachers, parents	Provide character education primarily working with students, staff and resources	\$73,350	N
6	Maintain an onsite school nutrition program	Maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs	\$80,600	N
7	Provide additional administrative support	Provide for additional site based administrative support for students (portion of salary + benefits)	\$79,074	Y

Goal Analysis for 2021.2022

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

While there were no substantive differences in planned actions and implementation of planned actions, we did face some ongoing challenges with components of various plan areas. For example, we experienced staffing shortages at various times of the year due to Covid protocol related absences, we experienced the same absence challenge with some contracted service providers, and were impacted to supply chain challenges (inability to obtain some items, ongoing delays in receiving other items).

While these did not create substantive differences, they did create a less stable environment for service provision for our students. As we exit pandemic protocols and the ongoing impacts of Covid begin to subside, we are hopeful that staffing shortages will become more manageable, and we have gained much insight into purchasing in the context of ongoing supply chain challenges.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Material differences between budgeted and estimated actual expenditures occurred in the following action areas:

- Professional development, lower than budgeted amounts due to fewer opportunities being taken (pandemic impacts)
- Access to intervention opportunities in reading and math, lower than budgeted amount due to lower than anticipated staffing costs
- Expanded access to take home reading material, lower than budgeted amount due to delay in hiring library staff
- Resources and professional development supporting further implementation of ELD standards, higher than budgeted amount due to increased investment in instructional materials
- Resource staffing in support of students with special needs, lower than budgeted amount due to lower than anticipated staffing costs (staffing vacancies)
- Parent meetings, lower than budgeted amount due to limited parent access to campus
- Onsite social emotional support and mental health support costs, lower than budgeted amount due to lower than anticipated sub-contracted service costs
- Provide character education to students, teachers, parents, lower than budgeted amount due to lower than anticipated staffing costs
- Maintain an onsite school nutrition program, higher than budgeted amount due to increased program needs (staffing costs)

The variance in planned percentage of improved service expenditures and estimated actual percentage of improved service expenditures are driven by the above noted variances in budgeted expenditures and estimated actual expenditures.

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

We are confident that the shortfalls occurring in meeting some of our metrics, were driven by pandemic related impacts. The various protocols and the continued Covid impacts on students and staff, impacted in our ability to meet some of our defined metrics. We are confident that over time, as we ascertain a more nuanced understanding of these impacts and will use that understanding to make necessary adjustment to goals, actions, metrics or desired outcomes.

For goal 1, we assessed the effectiveness of our actions based on year 1 actual performance, compared to baseline, and met or exceeded baseline in 6/10 applicable metrics. The investment in our teachers, staff, professional development, instructional resources/assessments, academic supports, increased access to reading materials and targeted supports are the foundation upon which we continue to build in support of goal 1 and attaining the corresponding desired outcomes.

For goal 2, we assessed the effectiveness of our actions based on year 2 actual performance, compared to baseline, and met or exceeded baseline in 7/9 applicable metrics. Ongoing Covid positivity, isolation and quarantine requirements for students & staff contributed to both the decrease in students feeling safe on campus and the increase in chronic absenteeism.

Protocol that limited visitors on campus, prohibited parents from being on campus until late in the school year, which directly contributed to parents feeling “less” welcome on campus.

We are confident that as we exit pandemic protocols, increase parent access on campus and return to more typical GVA ways (parent volunteers in classrooms, field trips, community building events, regular onsite parent meetings, etc.) that these indicators will improve

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

There are no changes to the planned goal, metrics, desired outcomes or actions for the coming year included in the 2022.2023 LCAP.

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students for 2022.2023

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$496,030	\$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
6.8%	0%	\$0	6.8%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

Great Valley Academy will receive an estimated \$496,030 in LCFF supplemental grant funds. GVA is expending the LCFF supplemental grant funds as determined by the school's goals, in support of California's 8 priority areas.

GVA's student unduplicated pupil count at Fall 1 2021-2022 consisted of approximately 9% English learners, and 28% socioeconomically disadvantaged students. In addition to using the lens of serving our unduplicated pupil groups in our school wide decision making, GVA solicits annual input in the form of surveys, from our various stakeholder groups: parents/families, students and staff. We analyze the data and use it to drive student and staff support as well as continuous improvement. The data gathered used to inform and facilitate our annual planning and the Local Control and Accountability Plan.

All of the actions and services contained in this LCAP are being implemented on a LEA/School wide basis. Those principally directed towards our foster youth, English learners and socioeconomically disadvantaged students are as follows:

Access to intervention opportunities in reading and math: provide additional instructional supports in reading and math, includes supports for English learners, and socioeconomically disadvantaged learners

Expanded access to take home reading materials: provide additional books for classroom libraries and connecting room to increase access to books for at home use

Targeted supports for English learners and socioeconomically disadvantaged students Lead staff person focusing on student supports & interventions; teacher and instructional aide support/training, data tracking reporting and for use in student support. Resources, initial and ongoing professional development in support of lead staff growth.

Resources and professional development supporting further implementation of ELD standards: English Language Development (ELD) focused instructional resources and professional development

Provide students with access to onsite support services (social emotional support): provide onsite social emotional support, subcontracted student assistance specialist services

Provide students with access to onsite support services (mental health support) : provide onsite mental health support, subcontracted mental health clinician

Maintain an onsite school nutrition program: maintain school nutrition program, benefits all with a primary benefit to socioeconomically disadvantaged students; staff costs

Provide additional administrative support: provide for additional site based administrative support for students (portion of salary + benefits)

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

The increase in proportionality for foster youth, English learners, and socioeconomically disadvantaged students is at 6.8%

The use of LCFF grant fund dollars in supporting basic school operations, building school/staff capacity, improvement and expansion of instructional/technological resources, targeted parent outreach, provision of intervention services, student support services and free/reduced price lunches, effectively meet the needs of our unduplicated pupil count. Specifically, these services have a direct impact on our unduplicated pupils; we provide students with a quality educational program in a supportive environment, so they are able to make academic improvement. Based on our annual update, analysis of metrics and stakeholder feedback, expending funds on these services is the most effective use of the funds.

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

Not Applicable

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	Not Applicable	Not Applicable
Staff-to-student ratio of certificated staff providing direct services to students	Not Applicable	Not Applicable

2021–22 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds			Local Funds	Federal Funds	Total Funds	Total Person	Total Non-personnel
Totals	\$ 1,288,192	\$ -	\$ -	\$ -	1,288,192	\$ 1,092,192	\$ 196,000		
Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	
1	1	New teacher support	All	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000	
1	2	Professional development-CCSS	All	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000	
1	3	Access to Common Core Aligned Materials	All	\$ 100,000	\$ -	\$ -	\$ -	\$ 100,000	
1	4	Access to Intervention-Reading & Math	All	\$ 160,000	\$ -	\$ -	\$ -	\$ 160,000	
1	5	Expand access to take home reading materials	All	\$ 36,500	\$ -	\$ -	\$ -	\$ 36,500	
1	6	Maintain Wireless infrastructure and security	All	\$ 62,800	\$ -	\$ -	\$ -	\$ 62,800	
1	7	Annual NWEA MAP assessment tools	All	\$ 12,500	\$ -	\$ -	\$ -	\$ 12,500	
1	8	Targeted supports for ELL and SED students	All	\$ 41,600	\$ -	\$ -	\$ -	\$ 41,600	
1	9	Resources supporting development of ELD standards	All	\$ 10,000	\$ -	\$ -	\$ -	\$ 10,000	
1	10	Maintenance of facilities	All	\$ 282,900	\$ -	\$ -	\$ -	\$ 282,900	
1	11	Resource staffing supporting students with special needs	All	\$ 291,022	\$ -	\$ -	\$ -	\$ 291,022	
				\$ -	\$ -	\$ -	\$ -	\$ -	
2	1	Host parent/family meetings	All	\$ 1,000	\$ -	\$ -	\$ -	\$ 1,000	
2	2	Family centered activities	All	\$ 5,000	\$ -	\$ -	\$ -	\$ 5,000	
2	3	Provide access to onsite social emotional supports	All	\$ 52,000	\$ -	\$ -	\$ -	\$ 52,000	
2	4	Provide access to onsite mental health supports	All	\$ 49,000	\$ -	\$ -	\$ -	\$ 49,000	
2	5	Provide character education to students, teachers, families	All	\$ 39,600	\$ -	\$ -	\$ -	\$ 39,600	
2	6	Maintain onsite school nutrition program	All	\$ 46,470	\$ -	\$ -	\$ -	\$ 46,470	
2	7	Provide additional administrative support	All	\$ 47,800	\$ -	\$ -	\$ -	\$ 47,800	

2021–22 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 7,084,044	\$ 426,176	6.02%	0.00%	6.02%	\$ 443,370	0.00%	6.26%	Total: \$ 443,370	
								LEA-wide Total: \$ 195,270	
								Limited Total: \$ 248,100	
								Schoolwide \$ -	
Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)	
1	1	New teacher support	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	2	Professional development-CCSS	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	3	Access to Common Core Aligned Materials	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	4	Access to Intervention-Reading & Math	Yes	Limited	All	LEA -wide	\$ 160,000	0.00%	
1	5	Expand access to take home reading materials	Yes	Limited	All	LEA -wide	\$ 36,500	0.00%	
1	6	Maintain Wireless infrastructure and security	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	7	Annual NWEA MAP assessment tools	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	8	Targeted supports for ELL and SED students	Yes	Limited	English Learners and Low-Income	LEA -wide	\$ 41,600	0.00%	
1	9	Resources supporting development of ELD standards	Yes	Limited	English Learners	LEA -wide	\$ 10,000	0.00%	
1	10	Maintenance of facilities	No	LEA-wide		LEA -wide	\$ -	0.00%	
1	11	Resource staffing supporting students with special needs	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	1	Host parent/family meetings	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	2	Family centered activities	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	3	Provide access to onsite social emotional supports	Yes	LEA-wide	All	LEA -wide	\$ 52,000	0.00%	
2	4	Provide access to onsite mental health supports	Yes	LEA-wide	All	LEA -wide	\$ 49,000	0.00%	
2	5	Provide character education to students, teachers, families	No	LEA-wide		LEA -wide	\$ -	0.00%	
2	6	Maintain onsite school nutrition program	Yes	LEA-wide	All	LEA -wide	\$ 46,470	0.00%	
2	7	Provide additional administrative support	Yes	LEA-wide	All	LEA -wide	\$ 47,800	0.00%	

2021-22 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	\$ 1,288,192.00	\$ 1,235,483.55

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	New teacher support	No	\$ 25,000	\$ 53,437
1	2	Professional development-CCSS	No	\$ 25,000	\$ 16,217
1	3	Access to Common Core Aligned Materials	No	\$ 100,000	\$ 101,203
1	4	Access to Intervention-Reading & Math	Yes	\$ 160,000	\$ 146,313
1	5	Expand access to take home reading materials	Yes	\$ 36,500	\$ 27,683
1	6	Maintain Wireless Infrastructure and security	No	\$ 62,800	\$ 63,536
1	7	Annual NWEA MAP assessment tools	No	\$ 12,500	\$ 10,500
1	8	Targeted supports for ELL and SED students	Yes	\$ 41,600	\$ 44,048
1	9	Resources supporting development of ELD stan	Yes	\$ 10,000	\$ 11,075
1	10	Maintenance of facilities	No	\$ 282,900	\$ 283,221
1	11	Resource staffing supporting students with spec	No	\$ 291,022	\$ 232,346
2	1	Host parent/family meetings	No	\$ 1,000	\$ 106
2	2	Family centered activities	No	\$ 5,000	\$ 5,998
2	3	Provide access to onsite social emotional suppor	Yes	\$ 52,000	\$ 40,079
2	4	Provide access to onsite mental health supports	Yes	\$ 49,000	\$ 29,407
2	5	Provide character education to students, teache	No	\$ 39,600	\$ 34,784
2	6	Maintain onsite school nutrition program	Yes	\$ 46,470	\$ 81,667
2	7	Provide additional administrative support	Yes	\$ 47,800	\$ 53,864

2021–22 Contributing Actions Annual Update Table

6. Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Actual Percentage of Improved Services (%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)	
\$ 426,176	\$ 443,370	\$ 437,198	\$ 6,172	0.00%	0.00%	0.00% - No Difference	
Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1	New teacher support	No	\$ -	\$ -	0.00%	0.00%
1	2	Professional development-CCSS	No	\$ -	\$ -	0.00%	0.00%
1	3	Access to Common Core Aligned Materials	No	\$ -	\$ -	0.00%	0.00%
1	4	Access to Intervention-Reading & Math	Yes	\$ 160,000	\$ 146,313.44	0.00%	0.00%
1	5	Expand access to take home reading materials	Yes	\$ 36,500	\$ 27,682.53	0.00%	0.00%
1	6	Maintain Wireless infrastructure and security	No	\$ -	\$ -	0.00%	0.00%
1	7	Annual NWEA MAP assessment tools	No	\$ -	\$ -	0.00%	0.00%
1	8	Targeted supports for ELL and SED students	Yes	\$ 41,600	\$ 44,048.01	0.00%	0.00%
1	9	Resources supporting development of ELD standard	Yes	\$ 10,000	\$ 11,075.00	0.00%	0.00%
1	10	Maintenance of facilities	No	\$ -	\$ -	0.00%	0.00%
1	11	Resource staffing supporting students with special ne	No	\$ -	\$ -	0.00%	0.00%
2	1	Host parent/family meetings	No	\$ -	\$ -	0.00%	0.00%
2	2	Family centered activities	No	\$ -	\$ -	0.00%	0.00%
2	3	Provide access to onsite social emotional supports	Yes	\$ 52,000	\$ 43,140.00	0.00%	0.00%
2	4	Provide access to onsite mental health supports	Yes	\$ 49,000	\$ 29,407.35	0.00%	0.00%
2	5	Provide character education to students, teachers, fe	No	\$ -	\$ -	0.00%	0.00%
2	6	Maintain onsite school nutrition program	Yes	\$ 46,470	\$ 81,667.11	0.00%	0.00%
2	7	Provide additional administrative support	Yes	\$ 47,800	\$ 53,864.25	0.00%	0.00%

2021–22 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$ 7,084,044	\$ 426,176	0.00%	6.02%	\$ 437,198	0.00%	6.17%	\$0.00 - No Carryover	0.00% - No Carryover

Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

- Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).
- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA’s final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity’s budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA’s diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

Prompt 2: “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated students
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.
- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA’s eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the “All Students” student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

Actions for English Learners: School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs

may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year: Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

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

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

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

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.

- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.

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

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

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

Contributing Actions Table

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

Annual Update Table

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

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

Contributing Actions Annual Update Table

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

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

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

LCFF Carryover Table

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

Calculations in the Action Tables

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

Contributing Actions Table

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

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

Contributing Actions Annual Update Table

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

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

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

LCFF Carryover Table

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

- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
 - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

Great Valley Academy Modesto
May 2022

	A Actual YTD Jul 21 - May 22	B Revised Budget YTD Jul 21 - May 22	C Estimated Balance of year Jun 22	D Revised Budget Balance of year Jun 22	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	6,315,708	6,196,337	1,067,426	1,193,309	8,290,756	7,389,646	7,383,134
8100 · Federal Revenue	660,380	707,745	542,461	417,368	1,300,605	1,125,113	1,202,841
8300 · Other State Revenues	770,839	71,076	192,659	854,692	630,743	925,768	963,498
8600 · Other Local Revenue	391,890	320,012	55,650	-50,012	458,500	270,000	447,541
8700 · Selpa	466,973	427,642	45,709	35,398	463,040	463,040	512,682
Total Income	8,605,791	7,722,812	1,903,905	2,450,755	11,143,644	10,173,567	10,509,696
Gross Profit	8,605,791	7,722,812	1,903,905	2,450,755	11,143,644	10,173,567	10,509,696
Expense							
1000 · Certificated Salaries	3,240,334	3,345,343	556,958	481,950	3,906,294	3,827,293	3,797,292
2000 · Classified Salaries	1,842,998	2,002,538	308,479	348,938	2,231,245	2,351,476	2,151,476
3000 · Employee Benefits	1,335,307	1,398,725	252,371	388,953	1,705,219	1,787,678	1,587,678
4000 · Books & Supplies	839,098	934,212	123,532	28,418	1,100,130	962,630	962,630
5000 · Services & Other Operating Exp	1,094,658	1,289,820	270,467	75,304	1,740,136	1,365,124	1,365,124
6000 · Capital Outlay	17,335	50,335	58,365	25,365	78,000	75,700	75,700
7430 · All Other Financing Uses	194,389	194,389	53,635	52,990	247,379	247,379	248,024
Total Expense	8,564,119	9,215,361	1,623,806	1,401,919	11,008,402	10,617,280	10,187,925
Net Ordinary Income	41,672	-1,492,550	280,099	1,048,837	135,241	-443,713	321,771

2021-2022
General Fund - Cash Flow
Great Valley Academy
Modesto

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	5,362,082.68	4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	P1 5,770,450.89	5,779,897.16	6,121,431.93	6,092,834.73	5,705,358.93		
LCFF Revenue	8011	0.00	0.00	834,743.00	395,405.00	0.00	790,810.00		395,405.00	474,716.00	237,358.00	237,358.00	237,360.00	0.00	3,603,155.00
EPA Funding	8012		0.00	534,335.00				534,336.00		367,312.00			546,092.00	0.00	1,982,075.00
In-Lieu of Taxes Charter Funding	8096		0.00	304,800.00	135,466.00	135,466.00	0.00	270,932.00	135,466.00	224,708.00	112,354.00	112,354.00	112,354.00	112,354.00	1,656,254.00
Selpa Prop Tax	8097							0.00	82,384.00					59,266.00	141,650.00
Federal IDEA	8181													115,722.00	115,722.00
Federal Food	8220		0.00	0.00	82,791.61	61,127.61	0.00	0.00	133,889.02		89,878.70	32,221.58	34,420.00	60,984.96	495,313.48
Title 1, Part A	8290							0.00						117,705.00	117,705.00
Fed Covid Funds ESSER II & III	8290			66,929.00				83,774.53			109,768.00		33,041.00	180,587.97	474,100.50
State Food Revenue	8520		0.00	0.00	6,106.83	4,490.28	0.00	0.00	9,906.72		43,703.78	(16,409.34)	2,300.00	4,327.73	54,426.00
Educator Effectiveness	8550							201,250.00						50,476.00	251,726.00
Mandated Cost Reimb	8550							15,255.00						0.00	15,255.00
Lottery	8560							65,433.41			42,541.20			36,513.48	144,488.09
Lottery, prop 20	8561										15,103.26			13,705.72	57,617.95
In Person Inst Grant 7422	8590		0.00	0.00				198,847.65					28,808.98	0.00	198,847.65
Universal Pre K	8590		0.00	0.00				0.00			0.00		0.00	0.00	0.00
Exp Lrng Opp Program	8590							94,922.00		31,064.00	15,532.00	15,532.00	15,530.00	0.00	172,580.00
Other	8590										17,249.15		11,629.00	29,367.85	58,246.00
Prior Year Payments	prior year	15,477.00	0.00	(58,293.00)	(2,839.11)			1,567.37		(8,328.00)	62,727.00		0.00	0.00	10,311.26
Uniform Sales	8638	12,919.75	35,716.26	16,067.09	12,320.02	8,610.00	5,837.00	1,189.00	2,208.00	2,485.00	1,525.00	869.00	0.00	0.00	99,746.12
Other Local (Kids Care)	8689	13,172.09	17,861.97	29,700.59	27,542.89	25,324.68	14,191.21	23,026.70	30,738.26	29,111.86	24,629.75	32,132.89	18,700.00	0.00	286,132.89
Other Local (Fundraiser +)	8600-8699	442.71	418.96	629.60	48.49	182.19	1,545.00	1,401.32	5,008.64	4,946.34	7,250.76	2,837.29	36,950.48	0.00	61,661.78
Selpa	8792		0.00	98,157.00	46,495.00	0.00	92,990.00	0.00	46,495.00	91,418.00	45,709.00	45,709.00	45,709.00	0.00	512,682.00
TOTAL REVENUES		42,011.55	53,997.19	1,827,068.28	703,336.73	235,200.76	905,373.21	1,491,934.98	841,500.64	1,217,433.20	825,329.60	462,604.42	1,122,894.46	781,010.71	10,509,695.72
EXPENDITURES															
Certificated Salaries	1000-1999	62,913.63	313,175.01	321,475.60	315,384.46	318,842.40	315,162.94	316,887.27	317,333.92	314,790.84	318,106.29	326,261.97	556,957.57	0.00	3,797,291.90
Classified Salaries	2000-2999	88,140.34	150,450.15	205,788.37	182,720.47	183,487.63	177,748.43	158,090.27	184,913.42	172,976.62	169,636.72	169,045.48	308,478.50	0.00	2,151,476.40
Employee Benefits	3000-3999	30,042.33	123,788.57	118,656.08	133,697.66	130,250.21	133,564.55	142,489.32	137,860.15	131,712.08	132,148.09	121,097.79	252,371.29	0.00	1,587,678.12
Books & Supplies	4000-4999	73,441.55	97,255.45	102,532.98	78,768.72	83,158.25	74,054.56	71,994.19	28,217.32	61,515.14	88,325.44	79,834.23	123,532.17	0.00	962,630.00
Services & Other Operating Expenses	5000-5999	67,907.35	47,386.73	266,778.09	52,504.59	54,925.90	175,317.20	79,906.85	81,445.64	84,942.72	72,975.45	110,567.34	270,466.61	0.00	1,365,124.47
Capital Outlay	6000-6999	0.00	7,700.00	0.00	9,635.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58,365.00	0.00	75,700.00
Other Outgo	7100-7499	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.76	17,671.21	53,635.31	0.00	248,024.12
TOTAL EXPENDITURES		340,116.96	757,427.67	1,032,902.88	790,382.66	788,336.15	893,519.44	787,039.66	767,442.21	783,609.16	798,863.75	824,478.02	1,623,806.45		10,187,925.01
NET INCREASE/DECREASE		(298,105.41)	(703,430.48)	794,165.40	(87,045.93)	(553,135.39)	11,853.77	704,895.32	74,058.43	433,824.04	26,465.85	(361,873.60)	(500,912.00)	781,010.71	321,770.71
Accruals Received		73,335.00		1,100,107.07				59,845.00							1,181,156.12
Liabilities		(544,380.68)	(18,745.28)		(108,759.66)	155,537.10	38,419.82	(216,187.44)	(64,612.16)	(92,289.27)	(55,063.05)	(25,602.20)			0.00
Line of Credit (1,000,000)															
Unearned Revenue	0												64,616.00		64,616.00
ENDING CASH BALANCE		4,592,931.59	3,870,755.83	5,765,028.30	5,569,222.71	5,171,624.42	5,221,898.01	5,770,450.89	5,779,897.16	6,121,431.93	6,092,834.73	5,705,358.93	5,269,062.94		

Great Valley Academy Salida
May 2022

	A Actual YTD Jul 21 - May 22	B Revised Budget YTD Jul 21 - May 22	C Estimated Balance of year Jun 22	D Revised Budget Balance of year Jun 22	E Original Annual Operating Budget	F Revised Annual Operating Budget	G Estimated Annual Spending A + C
Ordinary Income/Expense							
Income							
8000 · Revenue Limit Sources	6,326,954	6,423,462	661,282	743,077	7,646,195	7,166,539	6,988,236
8100 · Federal Revenue	517,868	605,255	480,121	328,448	974,454	933,703	997,990
8300 · Other State Revenues	598,394	66,985	236,724	725,181	598,889	792,166	835,118
8600 · Other Local Revenue	245,316	181,665	61,722	28,335	327,500	210,000	307,038
8700 · SELPA	448,265	406,629	43,878	21,782	428,411	428,411	492,143
Total Income	8,136,798	7,683,996	1,483,727	1,846,823	9,975,449	9,530,819	9,620,525
Gross Profit	8,136,798	7,683,996	1,483,727	1,846,823	9,975,449	9,530,819	9,620,525
Expense							
1000 · Certificated Salaries	2,997,239	3,103,807	597,888	547,319	3,663,528	3,651,126	3,595,126
2000 · Classified Salaries	1,582,662	1,627,000	290,001	245,664	1,843,431	1,872,664	1,872,664
3000 · Employee Benefits	1,332,259	1,381,117	299,127	250,269	1,601,402	1,631,386	1,631,386
4000 · Books & Supplies	718,595	836,750	115,499	17,345	967,595	854,095	834,094
5000 · Services & Other Operating Exp	1,114,167	1,182,319	169,168	101,016	1,269,118	1,283,335	1,283,335
6000 · Capital Outlay	59,314	59,314	38,686	38,686	78,000	98,000	98,000
7430 · All Other Financing Uses	328,570	328,570	64,330	65,342	393,912	393,912	392,900
Total Expense	8,132,806	8,518,878	1,574,699	1,265,640	9,816,985	9,784,518	9,707,505
Net Ordinary Income	3,992	-834,881	-90,972	581,182	158,464	-253,699	-86,980

2021 -2022
General Fund - Cash Flow
Great Valley Academy
Salida

Description	Object Codes	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total
BEGINNING CASH FUND BALANCE	9110	1,926,605.64	1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	4,245,527.98	4,079,144.06		
LCFF Revenue	8011	0.00	0.00	1,223,247.00	579,433.00	0.00	1,158,866.00	0.00	579,433.00	779,308.00	389,654.00	389,654.00	389,653.00	0.00	5,489,248.00
EPA Funding	8012		0.00	42,546.00		0.00	0.00	42,546.00		26,948.00			37,446.00	0.00	149,486.00
In-Lieu of Taxes Charter Funding	8096		0.00	211,546.00	94,021.00	94,021.00	0.00	188,042.00	94,021.00	177,292.00	88,646.00	88,646.00	88,646.00	88,646.00	1,213,527.00
Selpa Prop Tax	8097							0.00	79,084.00					56,891.00	135,975.00
Federal IDEA	8100-8299												0.00	117,151.00	117,151.00
Federal Food	8220		0.00	0.00	71,434.45	67,408.14	0.00	0.00	135,055.24	0.00	69,302.11	23,989.75	23,551.88	47,103.76	437,845.33
Title 1	8290				0.00									74,205.00	74,205.00
Fed Covid Funds ESSER II & III	8290			42,197.00			16,660.64	14,912.00		0.00	76,909.00		31,392.00	186,717.61	368,788.25
State Food Revenue	8520		0.00	0.00	5,203.55	4,842.43	0.00	0.00	10,033.27	0.00	4,831.24	20,412.90	2,500.00	5,676.61	53,500.00
Educator Effectiveness	8550							174,749.00						43,687.00	218,436.00
Mandated Cost Reimb	8550							14,644.00						0.00	14,644.00
Lottery	8560							62,886.81			40,885.55			34,930.86	138,703.22
Lottery, prop 20	8561										14,515.46			40,795.64	55,311.10
In Person Inst Grant 7422	8590		0.00	0.00				137,889.30						0.00	137,889.30
Universal Pre K	8590		0.00	0.00				0.00					0.00	0.00	0.00
Exp Lrng Opp Program	8590							79,655.00		26,068.00	13,034.00	13,034.00	13,032.00	0.00	144,823.00
Other	8590										16,993.13		64,616.00	41,361.87	122,971.00
Prior Year Payments	prior year	0.00	0.00	(48,920.00)	(2,661.68)	0.00	0.00	1,506.37		(27,746.00)	46,414.00	(9,876.00)	(9,876.00)	0.00	(51,159.31)
Other Local (Kids Care)	8689	7,661.35	14,820.07	20,137.42	14,608.40	19,855.82	15,740.86	16,350.27	17,616.59	23,200.32	24,821.67	24,493.68	12,681.89	0.00	211,988.34
Other Local (Fundraiser +)	8600-8699	154.26	19.36	7.81	8.45	8.49	1,309.06	2,187.96	964.24	4,861.01	18,569.36	17,919.88	49,039.89	0.00	95,049.77
Selpa	8792	0.00	0.00	94,225.00	44,633.00	0.00	89,266.00	0.00	44,633.00	87,754.00	43,877.00	43,877.00	43,878.00	0.00	492,143.00
TOTAL REVENUES		7,815.61	14,839.43	1,584,986.23	806,680.17	186,135.88	1,281,842.56	735,368.71	960,840.34	1,097,685.33	848,452.52	612,151.21	746,560.66	737,166.35	9,620,525.00
EXPENDITURES															
Certificated Salaries	1000-1999	20,099.25	291,562.39	292,958.20	293,296.60	295,789.96	303,290.17	301,292.22	306,874.43	288,515.61	300,578.59	302,981.40	597,887.66	0.00	3,595,126.48
Classified Salaries	2000-2999	55,820.29	126,160.12	160,526.25	144,381.86	156,103.21	161,048.52	139,526.68	166,107.14	151,315.14	162,966.92	158,706.14	290,001.44	0.00	1,872,663.71
Employee Benefits	3000-3999	66,882.84	118,595.32	122,850.18	125,434.15	122,581.40	128,511.38	132,182.99	137,202.16	125,283.79	128,626.76	124,108.02	299,126.73	0.00	1,631,385.72
Books & Supplies	4000-4999	23,814.63	70,797.97	148,286.02	75,650.05	56,712.01	58,324.97	64,846.53	25,442.47	54,015.33	84,246.35	56,458.40	115,499.03	0.00	834,093.76
Services & Other Operating Expenses	5000-5999	58,833.03	35,676.43	245,190.69	74,757.37	69,155.77	169,907.22	78,111.25	98,746.68	91,261.80	86,115.87	106,411.18	169,167.85	0.00	1,283,335.14
Capital Outlay	6000-6999	0.00	11,275.00	3,268.62	0.00	44,770.00	0.00	0.00	0.00	0.00	0.00	0.00	38,686.38	0.00	98,000.00
Other Outgo	7100-7499	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	29,869.99	64,329.99	0.00	392,899.88
TOTAL EXPENDITURES		255,320.03	683,937.22	1,002,949.95	743,390.02	774,982.34	850,952.25	745,829.66	764,242.87	740,261.66	792,404.48	778,535.13	1,574,699.08		9,707,504.69
NET INCREASE/DECREASE		(247,504.42)	(669,097.79)	582,036.28	63,290.15	(588,846.46)	430,890.31	(10,460.95)	196,597.47	357,423.67	56,048.04	(166,383.92)	(828,138.42)	737,166.35	(86,979.69)
Accruals Received		25,326.89	55,932.54	2,082,840.92	68,009.97			118,006.70							2,776,654.78
Liabilities Accrued (Paid)		(183,979.28)	0.00				(17,591.70)								
Note Payable for Curriculum															
From Modesto (to Modesto)	\$ -												63,735.00		
Unearned Revenue															0.00
ENDING CASH BALANCE		1,520,448.83	907,283.58	3,572,160.78	3,703,460.90	3,114,614.44	3,527,913.05	3,635,458.80	3,832,056.27	4,189,479.94	4,245,527.98	4,079,144.06	3,314,740.64		



Great Valley Academy – Modesto 2021-2022 School Year

Survey Highlights (families, staff, and student surveys)

Family Survey Results- Highlights

I feel welcome on campus	90% Agree/Strongly Agree
My child feels safe at school	100% Always/Most of the time
My child is happy to come to school	97% Always/Most of the time
GVA-Overall rating	96% Meets/Exceeds Expectations

Student (5th-8th grade) Survey Results- Highlights

I feel safe at GVA	85% Always/Most of the time
I am learning in my classes	90% Always/Most of the time
I feel loved at GVA	73% Always/Most of the time
I would like to talk with someone (personal) outside of class	21% Yes
I would like help with schoolwork outside of class	15% Yes

Staff Survey Results- Highlights

Site leadership demonstrates valuing staff	94% Agree/Strongly Agree
Interactions between staff are cooperative	94% Agree/Strongly Agree
I enjoy working at GVA	100% Agree/Strongly Agree



Great Valley Academy – Salida 2021-2022 School Year

Survey Highlights (families, staff, and student surveys)

Family Survey Results- Highlights

I feel welcome on campus	96% Agree/Strongly Agree
My child feels safe at school	100% Always/Most of the time
My child is happy to come to school	100% Always/Most of the time
GVA-Overall rating	95% Meets/Exceeds Expectations

Student (5th-8th grade) Survey Results- Highlights

I feel safe at GVA	80% Always/Most of the time
I am learning in my classes	91% Always/Most of the time
I feel loved at GVA	69% Always/Most of the time
I would like to talk with someone (personal) outside of class	16% Yes
I would like help with schoolwork outside of class	14% Yes

Staff Survey Results- Highlights

Site leadership demonstrates valuing staff	97% Agree/Strongly Agree
Interactions between staff are cooperative	97% Agree/Strongly Agree
I enjoy working at GVA	95% Agree/Strongly Agree



**Great Valley Academy – Modesto
2021-2022 School Year**

Local Control Funding Formula (LCFF) Priority 1 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools for Priority 1 are provided below.

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
 - 0 teachers 0% EL teacher misassignments
 - 1 teacher 2.1% total teacher misassignments
 - 0 vacant positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
 - 0 students without access 0%
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)
 - 0 identified instances

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).



**Great Valley Academy – Salida
2021-2022 School Year**

Local Control Funding Formula (LCFF) Priority 1 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

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Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
 - 0 teachers 0% EL teacher misassignments
 - 1 teacher 2.04% total teacher misassignments
 - 0 vacant positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
 - 0 students without access 0%
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)
 - 0 identified instances

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).



**Great Valley Academy – Modesto
2021-2022 School Year**

Local Control Funding Formula (LCFF) Priority 2 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools for Priority 2 are provided below.

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the *optional* reflection tool (Option 2).

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

1. **Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)			3		
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science			3		

2. **Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)			3		
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science			3		

3. **Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA				4	
ELD (Aligned to ELA Standards)			3		
Mathematics – Common Core State Standards for Mathematics				4	
Next Generation Science Standards			3		
History-Social Science			3		

Other Adopted Academic Standards

4. **Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education	N/A				
Health Education Content Standards				4	
Physical Education Model Content Standards					5
Visual and Performing Arts	N/A				
World Language	N/A				

Support for Teachers and Administrators

5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Activities	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole				4	
Identifying the professional learning needs of individual teachers			3		
Providing support for teachers on the standards they have not yet mastered			3		

Optional Narrative (Limited to 1,500 characters)

6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

N/A



**Great Valley Academy – Salida
2021-2022 School Year**

Local Control Funding Formula (LCFF) Priority 2 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools for Priority 2 are provided below.

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the *optional* reflection tool (Option 2).

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

- 1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)		2			
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards			3		
History-Social Science			3		

- 2. Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)		2			
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards			3		
History-Social Science			3		

3. **Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)		2			
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards			3		
History-Social Science			3		

Other Adopted Academic Standards

4. **Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education	N/A				
Health Education Content Standards				4	
Physical Education Model Content Standards				4	
Visual and Performing Arts	N/A				
World Language	N/A				

Support for Teachers and Administrators

5. **Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest): 1 – Exploration and Research Phase; 2 – Beginning Development; 3 – Initial Implementation; 4 – Full Implementation; 5 – Full Implementation and Sustainability

Activities	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole				4	
Identifying the professional learning needs of individual teachers			3		
Providing support for teachers on the standards they have not yet mastered			3		

Optional Narrative (Limited to 1,500 characters)

6. **Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

N/A



Great Valley Academy – Modesto 2021-2022 School Year

Local Control Funding Formula (LCFF) Priority 3 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools for Priority 3 are provided below.

Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit:¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring

LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	4
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	4
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	3

Practices	Rating Scale Number
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	3

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Use of Parent Square as a dedicated tool for communication. Increased training for parents on getting up to speed with the program.

Regularly communicating with parents through a weekly principal's email (parent square post).

Greatest strength is communication. GVA utilizes Parent Square as primary mode of communication. This is utilized to facilitate consistent communication regarding key events, learning priorities and progress, successes and needs, etc. GVA Salida has prioritized the re-establishment of parent access to campus during decreased COVID rates. This includes morning drop-off at classrooms, parent meetings, volunteer opportunities, weekly whole school assemblies, and additional whole school events. Parent focus groups were facilitated for the first time this year, which helped increase partnership opportunities between school and home.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

The focus for improvement will be to continue to re-establish traditional relationship opportunities that have been disrupted due to COVID. Examples include: Back to School Night, Parent Education Nights, Parent Collaborative meetings, etc.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

Reclassification celebrations will be facilitated to honor and engage with our English language learner families. An ELAC team is in development.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 – Exploration and Research
- 2 – Beginning Development
- 3 – Initial Implementation
- 4 – Full Implementation
- 5 – Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	3
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	4
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	4
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	4

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

Use of parent square (parent communication tool) is promoted school wide. Ongoing troubleshooting to ensure this tool is being used. Training provided when needed. Access provided when needed.

Use of digital resources (Lexia, Moby Max, Imagine) that can be used in the home that also have a data tool to check progress. Use of Google Classroom bridges gaps between school and home.

Improved communication with our Language Learner population. Notices of LL assessment sent home prior to ELPAC testing to inform parents of procedures and rights. Regular communication back and forth provided as needed. Sent test scores home to all families of LLs for progress communication and monitoring. Held ELPAC family meeting in conjunction with Literacy event. Sent literacy packets (books) home to all K-3 students. Held a celebration event for the students who passed the test and reclassified from LL status.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

Continue with regular parent meetings, and expand on opportunities for families to be on campus (with a focus on unduplicated student families).

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Deepen and expand both our communications and on campus engagement opportunities with our underrepresented families.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 – Exploration and Research
- 2 – Beginning Development
- 3 – Initial Implementation
- 4 – Full Implementation
- 5 – Full Implementation and Sustainability

Practices	Rating Scale Number
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	3
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	3
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	3
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	3

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

GVA facilitates an annual survey including the following educational partners: staff, students and families

Principals have scheduled meetings with parents throughout the year.

GVA facilitated it's first round of family focus groups this year, as an additional method of engaging our partners.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making Become more intentional using survey data and analyzing this as a team.

Having planned sessions from the start of the year to ensure time is reserved to discuss the results together.

After COVID era limitations, holding more regularly scheduled parent meetings.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Deepen and expand both our communications and on campus engagement opportunities with our underrepresented families.



Great Valley Academy – Salida

2021-2022 School Year

Local Control Funding Formula (LCFF) Priority 3 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

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Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit:¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	4
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	4
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	3

Practices	Rating Scale Number
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	3

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Greatest strength is communication. GVA utilizes Parent Square as primary mode of communication. This is utilized to facilitate consistent communication regarding key events, learning priorities and progress, successes and needs, etc. GVA Salida has prioritized the re-establishment of parent access to campus during decreased COVID rates. This includes morning drop-off at classrooms, parent meetings, volunteer opportunities, weekly whole school assemblies, and additional whole school events. Parent focus groups were facilitated for the first time this year, which helped increase partnership opportunities between school and home.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

The focus for improvement will be to continue to re-establish traditional relationship opportunities that have been disrupted due to COVID. Examples include: Back to School Night, Parent Education Nights, Collaborative Coffees, 50s Barbecue, Talent Show, etc.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

Reclassification celebrations will be facilitated to honor and engage with our English language learner families. An ELAC team is in development.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 – Exploration and Research
- 2 – Beginning Development
- 3 – Initial Implementation
- 4 – Full Implementation
- 5 – Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	3
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	4
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	3
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	3

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

Use of parent square (parent communication tool) is promoted school wide. Ongoing troubleshooting to ensure this tool is being used. Training provided when needed. Access provided when needed.
 Use of digital resources (Lexia, Moby Max, Imagine) that can be used in the home that also have a data tool to check progress. Use of Google Classroom bridges gaps between school and home.

Improved communication with our Language Learner population. Notices of LL assessment sent home prior to ELPAC testing to inform parents of procedures

and rights. Regular communication back and forth provided as needed. Sent test scores home to all families of LLs for progress communication and monitoring. Held ELPAC family meeting in conjunction with Literacy event. Sent literacy packets (books) home to all K-3 students. Held a celebration event for the students who passed the test and reclassified from LL status.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

Continue with regular parent meetings, and expand on opportunities for families to be on campus (with a focus on unduplicated student families).

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Deepen and expand both our communications and on campus engagement opportunities with our underrepresented families.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 – Exploration and Research
- 2 – Beginning Development
- 3 – Initial Implementation
- 4 – Full Implementation
- 5 – Full Implementation and Sustainability

Practices	Rating Scale Number
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	3

Practices	Rating Scale Number
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	3
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	3
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	2

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

GVA facilitates an annual survey including the following educational partners: staff, students and families

Principals have scheduled meetings with parents throughout the year.

GVA facilitated it's first round of family focus groups this year, as an additional method of engaging our partners.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

Become more intentional using survey data and analyzing this as a team.

Having planned sessions from the start of the year to ensure time is reserved to discuss the results together.

After COVID era limitations, holding more regularly scheduled parent meetings.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Deepen and expand both our communications and on campus engagement opportunities with our underrepresented families.



Great Valley Academy – Modesto 2021-2022 School Year

School Climate (LCFF Priority 6)

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6–8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters).

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.

Student (5th-8th grade) Survey Results- Highlights

I feel safe at GVA	85% Always/Most of the time
I am learning in my classes	90% Always/Most of the time
I feel loved at GVA	73% Always/Most of the time
I would like to talk with someone (personal) outside of class	21% Yes
I would like help with schoolwork outside of class	15% Yes

2. **MEANING:** What do the disaggregated results (*if applicable*) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?

Not applicable

3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

Covid protocols, including quarantine/isolation, impacted our students sense of safety and feeling loved. We believe that moving out of pandemic protocols and their limitations, will provide an improvement to students feeling safe at school, and their sense of feeling loved at school.

We continued providing social emotional support services, added mental health service, tutoring and afterschool clubs. We anticipate seeing improved feelings of safety, and belonging as a result of these services.



Great Valley Academy – Salida 2021-2022 School Year

School Climate (LCFF Priority 6)

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6–8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters).

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.

Student (5th-8th grade) Survey Results- Highlights

I feel safe at GVA	80% Always/Most of the time
I am learning in my classes	91% Always/Most of the time
I feel loved at GVA	69% Always/Most of the time
I would like to talk with someone (personal) outside of class	16% Yes
I would like help with schoolwork outside of class	14% Yes

2. **MEANING:** What do the disaggregated results (*if applicable*) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?

Not applicable

3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

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Great Valley Academy – Modesto 2021-2022 School Year

Local Control Funding Formula (LCFF) Priority 7 Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools for Priority 7 are provided below.

Access to a Broad Course of Study (LCFF Priority 7)

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

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

GVA maintains schedules by class/grade and uses that to verify that a broad course of study is provided for all students.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

GVA provides a broad course of study for its K-8 students.

3. Given the results of the tool or locally selected measures, identify the barriers

preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

No barriers were identified.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

No revisions or new actions will be pursued at this time.



Great Valley Academy – Salida 2021-2022 School Year

Local Control Funding Formula (LCFF) Priority 7 Self-Reflection Tools

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