



Board Meeting Packet
March 14, 2024

**BIG SUR CHARTER SCHOOL
REGULAR SCHOOL BOARD MEETING MINUTES**

February 15, 2024 at 4:30 PM

Big Sur Charter School, 304 Foam St, Monterey CA, 93940

Individuals who require special accommodation, including but not limited to an American sign language interpreter, accessible seating or documentation in accessible formats, should contact the School Director or designee at least two days before the meeting. The meeting may be attended virtually using the following Zoom link:
<https://bigsurcharterschool-org.zoom.us/j/85963352790?pwd=eWJoOWFCb1FFaWI2MzVZRlh5YXFtQT09>

I. OPENING BUSINESS

1. Call to Order 4:37 PM

2. Roll Call -

Board Members Present: Rachel Black, Chad Bollmann, Suzy Graybill, Chantel Kjellgren, Jennifer Ross

Board Members Absent: Jessica Ramey-Herne

Others in Attendance: Aimee Alling - School Director, Nathan Nuñez

3. Action to Add New Items Since Posting of Agenda (2/3 Majority)

4. Adoption of Agenda

Motion to Adopt: Chantel Kjellgren

Second: Chad Bollmann

All in favor: Unanimous

Opposed: None

II. RECOGNITIONS: *STUDENTS, INDIVIDUALS AND/OR ORGANIZATIONS FOR SIGNIFICANT CONTRIBUTIONS MADE TO THE SCHOOL.*

- Nathan Nuñez is recognized for volunteering to join the board.

III. COMMUNICATIONS

1. Written Communication: None Received

2. Board Member Comments:

- Fluency boards only available for middle school students
- Professional development for math and language arts
- Stemsopes needs to be evaluated, possibly taught more
- Chantel has been revamping the employment satisfaction survey
- Need to figure out the Director Evaluation

3. Director's Report

- Enrollment: Currently 85 students, which is down from the 92 students at the start of the year.
- Funding Determination - Did not quite meet the 70/30 spending ratio required for 100% funding.. Currently working on appeal.
- Working with the landlord to get the building painted and leaks fixed.
- Family game night was a success.
- Met with CharterSafe to review coverage. We will see the changes in our premium next billing cycle.
- Continued enrollment - 95% response rate. Six families will not be returning. Two Families are going to five days a week school and four families are moving.
- Chapman grant will be submitted next week.

4. BSCS Staff Comments (Non-Agenda Items) None

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IV. HEARING SESSION

Citizens may address the board about subjects not listed on the agenda; comments on agenda items should be held until that matter is considered. In either case, speakers addressing the board are limited to three (3) minutes with a maximum of twelve (12) minutes per topic. Any member of the public who utilizes a translator will receive six (6) minutes with a maximum of twenty-four (24) minutes per topic. This ensures that non-English speakers receive the same opportunity to address the board as English speakers. Comments will be heard with no action taken.

V. CONSENT AGENDA

Items listed under the Consent Agenda are considered to be routine and/or may have been discussed at a previous Board meeting. There is no discussion of these items prior to the Board vote unless a member of the Board requests specific items be discussed and/or removed from the Consent Agenda. Each item on the Consent Agenda and approved by the Board Members shall be deemed to have been considered in full and/or adopted as recommended.

1. Approve Board Meeting Minutes from January 18, 2024

Recommendation: (Aimee Alling, Director) The Administration recommends approval of the minutes as presented.

2. Approve Bank Statement:

1st Capital Bank Statement - January 31, 2024

Recommendation: (Aimee Alling, Director) I certify that I have reviewed the attached statement for consistency with the School's budget, and purchasing and accounting practices and therefore, recommend Board approval.

3. Approve Credit Card Statements:

US Bank Statement - January 22, 2024

Wells Fargo Statement - February 2, 2024

Recommendation: (Aimee Alling, Director) I certify that I have reviewed the attached statement for consistency with the School's budget, and purchasing and accounting practices and therefore, recommend Board approval.

4. Board Report of Warrants:

Warrants from January 13 - February 9, 2024

Recommendations: (Aimee Alling, Director) I certify that I have reviewed the attached warrants for consistency with the School's budget, and purchasing and accounting practices and therefore, recommend Board approval.

Motion to approve: Chad Bollmann

Seconded: Chantel Kjellgren

All in favor: Unanimous

Opposed: None

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VI. ACTION/DISCUSSION

1. Set Enrollment Cap (Director)
Board Action: Set the enrollment cap at 105
Motion to adopt: Suzy Graybill
All in favor: Unanimous
Second: Rachael Black
Opposed: None

2. Review and Adopt Safety Plan (Director)
Board Action: No significant changes
Motion to adopt: Rachael Black
All in favor: Unanimous
Second: Chad Bollmann
Opposed: None

3. Approve Internal Complaint Policy & Procedure - Special Education (Director)
Board Action: Reviewed
Motion to approve: Chad Bollmann
All in favor: Unanimous
Second: Chantel Kjellgren
Opposed: None

4. Approve Brown Act Policy (Director)
Board Action: Reviewed
Motion to approve: Chantel Kjellgren
All in favor: Unanimous
Second: Jennifer Ross
Opposed: None

5. Approve Public Records Request Policy (Director)
Board Action: Reviewed
Motion to approve: Jennifer Ross
All in favor: Unanimous
Second: Suzy Graybill
Opposed: None

6. Approve J. Garcia Hourly Contract (Director)
Board Action: Reviewed
Motion to approve: Suzy Graybill
All in favor: Unanimous
Second: Rachael Black
Opposed: None

7. Approve Updates to Board Manual (Board)
Board Action: Reviewed
Motion to approve: Rachael Black
All in favor: Unanimous
Second: Chad Bollmann
Opposed: None

8. Approve Updates to Board Bylaws (Board)
Board Action: Reviewed
Motion to approve: Chad Bollmann
All in favor: Unanimous
Second: Chantel Kjellgren
Opposed: None

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VII. INFORMATION/DISCUSSION

1. Budget vs. Actuals
Board Action: Discussed, adding reserves policy to next months agenda
2. Review and Discuss the Next Two Months of the Board Calendar
Board Action: Reviewed the next two months.
3. April Fundraiser Needs: Recruit Volunteers, Solicit Donations, Secure Wine Donations, Secure Food, etc.
Board Action: discussed, looking at having the event catered.

VIII. CLOSED SESSION

1. To discuss personnel matters - Government code 6254 (q.v.)
2. The Board adjourned to Closed Session at 5:50 PM

IX. RECONVENE IN OPEN SESSION

1. The Board adjourned from Closed Session and reconvened in Open Session at 6:43 PM
2. Report From Closed Session Minutes: No report from Closed Session.

X. ADJOURNMENT

Time Adjourned: 6:44 PM

Board To Do List for March

- File Statement of Information
- Discuss need and location of Form 700 (due in April)
- Send Employment satisfaction Survey Items for next meeting (send after March meeting)
- Rachael Black to update the agenda "Hearing Session"
- Review & Adopt 2nd Interim Budget (Due March 15th)
- Review Board Composition & Terms
- Approve Academic Calendar
- Review Personnel Needs (Director)
- Approve Auditor Selection
- Budget vs Actuals
- Vote in Nathan Nunez
- Reserves Policy

Board To Do List for April

- Verify Form 700 Complete
- Review & Approve Family Handbook
- Approve Form 990 (Due May)
- Review Employment Satisfaction Survey results
- Budget vs Actuals

1ST CAPITAL BANK

P.O. BOX 811
Salinas, CA 93902

RETURN SERVICE REQUESTED






BIG SUR CHARTER SCHOOL
304 FOAM ST
MONTEREY CA 93940-1408

Statement Ending 02/29/2024

BIG SUR CHARTER SCHOOL
Account Number: XXXXXX0996

Page 1 of 2

Managing Your Accounts

	Branch Name	Monterey
	Branch Phone Number	(831) 264-4070
	Customer Service	(831) 264-4000
	Mailing Address	P.O. BOX 811 Salinas, CA 93902
	Online Banking	1stcapital.bank

Summary of Accounts

Account Type	Account Number	Ending Balance
NON PROFIT BUSINESS CHECKING	XXXXXX0996	\$5,192.97

NON PROFIT BUSINESS CHECKING-XXXXXX0996

Account Summary

Date	Description	Amount
02/01/2024	Beginning Balance	\$5,192.97
	0 Credit(s) This Period	\$0.00
	0 Debit(s) This Period	\$0.00
02/29/2024	Ending Balance	\$5,192.97

Overdraft and Returned Item Fees

	Total for this period	Total year-to-date	Previous year-to-date
Total Overdraft Fees	\$0.00	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00	\$0.00



The Following Disclosures Apply to Your 1st Capital Bank Account

If there are any discrepancies between your records and this statement, please notify your branch immediately. If no errors are brought to our attention within 30 days, the account will be considered correct. All items are credited subject to final payment.



IMMEDIATELY REPORT THE LOSS OR THEFT OF ANY CHECKS, DEBIT CARD OR PIN ISSUED FOR THIS ACCOUNT. CALL US AT (831) 264-4000.

In Case of Errors or Questions About Your Electronic Transfers

(APPLIES ONLY TO CONSUMER ACCOUNTS)

Telephone us at (831) 264 4000 or Write us at 1st Capital Bank, P.O.BOX 811, Salinas, CA 93902 as soon as you can, if you think your statement is wrong or if you need more information about a transfer on the statement. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem occurred.

- (1) Tell us your name and account number.
- (2) Describe the error or the transfer you are unsure about and explain as clearly as you can why you believe it is in error or why you need more information.
- (3) Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days to do this, we will credit your account for the amount you think is in error, so that you will have use of the money during the time it takes us to complete our investigation. For new accounts, we may take up to 20 business days to credit your account for the amount you think is in error.

Reporting other problems

You must examine your statement carefully and promptly. You are in the best position to discover errors and unauthorized transactions on your account. If you fail to notify us in writing of suspected problems or an unauthorized transaction within the time period specified in the deposit agreement (which periods are no more than 60 days after we make the statement available to you and in some cases are 30 days or less), we are not liable to you and you agree to not make a claim against us, for the problems or unauthorized transactions.

Direct Deposits

If you have arranged to have direct deposits made to your account at least once every 60 days from the same person or company, you may call us to find out if the deposit was made as scheduled. You may also review your activity online or visit a branch for more information.

Terms and Conditions of Your Account

When you opened your account, you received the Terms and Conditions of Your Account document along with a fee schedule and agreed that your account would be governed by the terms of these documents, as we may amend them from time to time. These documents are part of the contract for your deposit account and govern all transactions relating to your account, including all deposits and withdrawals. Copies of both the Terms and Conditions of Your Account and fee schedule may be obtained at one of our branches.

Check 21 Notification

If you request the return of your original checks you may receive a "Substitute Check" in response. The Substitute Check is the legal equivalent of an original check and you have the rights that apply when you believe in good faith, that a Substitute Check was not properly charged to your account. Contact your branch or call the number on the front of this statement to request a Check 21 disclosure.



P.O. BOX 6343
FARGO ND 58125-6343



ACCOUNT NUMBER [REDACTED] 7669
STATEMENT DATE 02-22-2024
AMOUNT DUE \$2,802.96
NEW BALANCE \$2,802.96
PAYMENT DUE ON RECEIPT



BIG SUR CHARTER SCHOOL
ATTN CHRISTIN LOPEZ
304 FOAM ST
MONTEREY CA 93940-1408

AMOUNT ENCLOSED
\$

Please make check payable to "U S Bank"

U.S. BANK CORPORATE PAYMENT SYSTEMS
P.O. BOX 790428
ST. LOUIS, MO 63179-0428

Please tear payment coupon at perforation.

CORPORATE ACCOUNT SUMMARY

BIG SUR CHARTER SCHO 4246 0445 5575 7669	Previous Balance	Purchases And Other + Charges	Cash + Advances	Cash Advance Fees	Late Payment Charges	Credits	Payments	New = Balance
Company Total	\$291.27	\$2,802.96	\$0.00	\$0.00	\$0.00	\$0.00	\$291.27	\$2,802.96

CORPORATE ACCOUNT ACTIVITY

BIG SUR CHARTER SCHOOL
[REDACTED]-7669

TOTAL CORPORATE ACTIVITY
\$291.27 CR

Post Date	Tran Date	Reference Number	Transaction Description	Amount
02-05	02-02	7479826403600000001843	PAYMENT - THANK YOU 00000 C	291.27 PY

NEW ACTIVITY

CHRISTIN LOPEZ
[REDACTED]-7927

CREDITS
\$0.00

PURCHASES
\$747.41

CASH ADV
\$0.00

TOTAL ACTIVITY
\$747.41

Post Date	Tran Date	Reference Number	Transaction Description	Amount
01-23	01-22	24943004023898002128553	COSTCO WHSE #0131 SEASIDE CA	101.94
01-29	01-27	24137464028001127784510	USPS PO 0557420310 PACIFIC GROVE CA	1.63
02-05	02-03	24164074035091250847220	TARGET 00010629 SAND CITY CA	15.27
02-09	02-08	24431064040400631000030	COAST ACE HDWE PACIFIC GROVE CA	17.02
02-12	02-12	24692164043102719382129	DBC*BLICK ART MATERIAL 800-447-1892 IL	246.61

CUSTOMER SERVICE CALL

800-344-5696

ACCOUNT NUMBER

[REDACTED]-7669

ACCOUNT SUMMARY

PREVIOUS BALANCE 291.27
PURCHASES &
OTHER CHARGES 2,802.96

STATEMENT DATE 02/22/24
DISPUTED AMOUNT .00

CASH ADVANCES .00
CASH ADVANCE FEES .00
LATE PAYMENT
CHARGES .00

SEND BILLING INQUIRIES TO:
U.S. Bank Nat onal Assoc at on
C/O U.S. Bancorp Purchasing Card Program
P.O. Box 6335
Fargo, ND 58125-6335

AMOUNT DUE

2,802.96

CREDITS .00
PAYMENTS 291.27
ACCOUNT BALANCE 2,802.96



Company Name: BIG SUR CHARTER SCHOOL
Corporate Account Number: [REDACTED] 7669
Statement Date: 02-22-2024

NEW ACTIVITY

Post Date	Tran Date	Reference Number	Transaction Description	Amount
02-12	02-08	24943014040010182711194	THE HOME DEPOT #6967 SEASIDE CA	25.96
02-13	02-12	24231684044837000052956	SMART AND FINAL 455 SEASIDE CA	57.24
02-14	02-12	24013394044001407222353	PIZZA MY HEART 831-6569400 CA	158.41
02-14	02-13	24137464045001421609107	USPS PO 0557420310 PACIFIC GROVE CA	94.33
02-21	02-21	24492164052000007935345	TSW* TRIAL OVER HTTPSWWW.THES CA	29.00

AIMEE ALLING

[REDACTED]-7891

CREDITS
\$0.00

PURCHASES
\$2,055.55

CASH ADV
\$0.00

TOTAL ACTIVITY
\$2,055.55

Post Date	Tran Date	Reference Number	Transaction Description	Amount
01-23	01-22	24692164022109635381312	AMZN MKTP US*R86PP4KX2 AMZN.COM/BILL WA	54.56
01-24	01-23	24692164023100496378256	AMZN MKTP US*R81HW8K01 AMZN.COM/BILL WA	77.51
01-24	01-24	24692164024100701968817	AMZN MKTP US*R07AI9OL2 AMZN.COM/BILL WA	8.73
01-25	01-24	24692164024100882067124	AMZN MKTP US*R07U65FZ2 AMZN.COM/BILL WA	327.60
01-29	01-26	24137464027001278096970	CVS/PHARMACY #09320 MONTEREY CA	25.66
02-05	02-02	24692164033107843555690	AMZN MKTP US*R224V0X32 AMZN.COM/BILL WA	42.58
02-08	02-08	24692164039102491433641	AMAZON.COM*RB4PU7SN0 AMZN.COM/BILL WA	38.77
02-12	02-09	24011344040000054060364	ZOOM.US 888-799-9666 WWW.ZOOM.US CA	15.29
02-12	02-10	24137464042100820576959	TRADER JOE S #079 PACIFIC GROVE CA	18.95
02-12	02-09	24692164040100560064609	AMZN MKTP US*RB32545K2 AMZN.COM/BILL WA	13.60
02-14	02-13	24431064044083738520971	AMAZON.COM*RI6J64F62 SEATTLE WA	147.46
02-14	02-14	24692164045104197952223	AMAZON.COM*RB8JV7D11 AMZN.COM/BILL WA	89.11
02-15	02-14	24692164045104761434020	AMZN MKTP US*RB2Y117A1 AMZN.COM/BILL WA	66.56
02-15	02-15	24692164046105017486085	APPLE.COM/US 800-676-2775 CA	931.53
02-16	02-15	24430994046828755968645	APPLE.COM/US 800-692-7753 CA	59.00
02-16	02-16	24692164047105818592023	APPLE.COM/US 800-676-2775 CA	130.01
02-19	02-16	24431064047083708332594	AMAZON.COM*RB74K3YS1 SEATTLE WA	8.63

Department: 00000 Tota :
D v s on: 00000 Tota :

\$2,802.96
\$2,802.96



Prepared For	BIG SUR CHARTER SCHOOL CHRISTIN LOPEZ
Account Number	██████████ 5589
Statement Closing Date	03/03/24
Days in Billing Cycle	30
Next Statement Date	04/03/24

For Customer Service Call:
800-225-5935

Inquiries or Questions:
Wells Fargo SBL PO Box 29482
Phoenix, AZ 85038-8650

Credit Line	\$2,000
Available Credit	\$1,970

Payments:
Payment Remittance Center PO Box 77033
Minneapolis, MN 55480-7733

Payment Information

New Balance	\$29.99
Current Payment Due (Minimum Payment)	\$25.00
Current Payment Due Date	03/28/24

If you wish to pay off your balance in full: The balance noted on your statement is not the payoff amount. Please call 800-225-5935 for payoff information.

Account Summary

Previous Balance		\$29.99
Credits	-	\$0.00
Payments	-	\$29.99
Purchases & Other Charges	+	\$29.99
Cash Advances	+	\$0.00
Finance Charges	+	\$0.00
New Balance	=	\$29.99

Rate Information

Your rate may vary according to the terms of your agreement.

TYPE OF BALANCE	ANNUAL INTEREST RATE	DAILY FINANCE CHARGE RATE	AVERAGE DAILY BALANCE	PERIODIC FINANCE CHARGES	TRANSACTION FINANCE CHARGES	TOTAL FINANCE CHARGES
PURCHASES	18.400%	05041%	\$0.00	\$0.00	\$0.00	\$0.00
CASH ADVANCES	27.240%	07463%	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL				\$0.00	\$0.00	\$0.00

Important Information

TOTAL *FINANCE CHARGE* BILLED IN 2023 \$1.00

TOTAL *FINANCE CHARGE* PAID IN 2023 \$1.00

Transaction Details

Trans	Post	Reference Number	Description	Credits	Charges
02/17	02/17	8558668E126RZB3HF	PAYMENT THANK YOU	29.99	
03/02	03/02	5543286EE5WOMX4V	SIMPLISAFE 888-957-4675 MA		29.99

See reverse side for important information

5596 YTG 1 7 2 240303 0 PAGE 1 of 4 1 0 8891 0300 BXSX 01DQ5596

----- DETACH HERE -----

Detach and mail with check payable to "Wells Fargo" to arrive by Current Payment Due Date

Make checks payable to: Wells Fargo

Account Number	██████████ 5589
New Balance	\$29.99
Total Amount Due (Minimum Payment)	\$25.00
Current Payment Due Date	03/28/24



Amount Enclosed: \$

PAYMENT REMITTANCE CENTER YTG
PO BOX 77033 8
MINNEAPOLIS MN 55480-7733

BIG SUR CHARTER SCHOOL
CHRISTIN LOPEZ
304 FOAM ST
MONTEREY CA 93940-1408

If your card is ever lost or stolen

Please notify us immediately by calling: **1-800-225-5935**.

Questions about your statement

If you have a question about your statement, please write to us within 30 days after the statement was mailed to you. Please use a separate letter and include your account number and the date of the statement in question. Please refer to the front of the statement for our Inquiry mailing address.

For all your personal or business financial service needs, visit us at [wellsfargo.com](https://www.wellsfargo.com)

Important payment information

Payments made at a Wells Fargo branch

You may use cash or checks when making payments at a Wells Fargo branch.

Payments by mail

Mail your check and the payment coupon to the Payment Remittance Center address printed on this statement. For fastest delivery, please use the enclosed window envelope. If using a single check to pay multiple accounts, we must receive a completed payment coupon for each account being paid or a list showing the full account number and amount to be credited to each account. If you are paying multiple accounts with a single check, the total of the check must equal the sum of the payments to be applied to each individual account, with at least the total minimum payment due for all accounts.

Payments by phone

If you are authorized to transact on the account, you may be able to initiate a payment by calling the Customer Service number listed on the front of this statement.

Payments made using Wells Fargo Online Banking or Wells Fargo Mobile

If you have access to the account via Wells Fargo Online Banking or Mobile you may be able to make a payment depending on your level of access.

Automatic Payments

You can establish automatic payments to this credit account from a Wells Fargo deposit account or any other financial institution. For enrollment information, please contact our Customer Service number listed on the front of this statement.

Timing of payment by mail or payments made at a Wells Fargo branch

Payments that are received at the designated payment processing address (printed on each statement) by 5:00 p.m. on any business day will be credited as of the day of receipt. Payments received after 5:00 p.m. or on non-business days may be credited as of the next business day.

When a payment is considered late

If your payment is received or initiated any time after the Due Date, it is considered late and your account will be subject to a late fee.

Promotional rates

All promotional rates are subject to early termination if there are late payments or other defaults. Please see sections "Default" and "Remedies" in your Cardholder Agreement.

Managing your account

To manage your account, including card payments, alerts and change of address, visit [wellsfargo.com](https://www.wellsfargo.com) or call the customer service number which appears on your account statement.

Get statements online securely and conveniently

Make managing your business credit card
account easier



Stay secure

Protect your private
information to help
avoid loss or theft



Save time

View statements
online anytime
without waiting for
the mail



Stay on top of payments

Get email notifications
as soon as your
statements are ready

Go paperless in 3 quick steps

1. Visit wellsfargo.com/statements or scan the QR code, and log into secure online banking.
2. Access **Manage Delivery Preferences**
3. Choose **Online Statements**¹



¹ Online Statements require Adobe® Acrobat® PDF reader. For credit card accounts, Online Statements are available to view and download for up to two years. Availability may be affected by your mobile carrier's coverage area. Your mobile carrier's message and data rates may apply.

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Checks Dated 02/10/2024 through 03/11/2024			Board Meeting Date March 14, 2024		
Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
12819164	02/22/2024	AT&T Mobility	62-5900		183.04
12819165	02/22/2024	California American Water	62-5500		50.10
12819166	02/22/2024	California American Water	62-5500		183.40
12819167	02/22/2024	Central Coast Language and Learning Center	62-5800		1,080.00
12819168	02/22/2024	EMPLOYMENT DEVELOPMENT DEPT	62-5800		398.97
12819169	02/22/2024	Gerda Marotta	62-5600		8,244.44
12819170	02/22/2024	Pediatric Therapy Associates	62-5800		930.15
12819171	02/22/2024	Thinking Maps, Inc	62-5800		900.00
12819172	02/22/2024	TinyEYE Tech Corp	62-5800		511.67
12819173	02/22/2024	Tucci Learning Services, Inc	62-5800		812.50
12822674	03/07/2024	AT&T Mobility	62-5900		54.72
12822675	03/07/2024	AT&T Mobility	62-5900		11.24
12822676	03/07/2024	CharterSafe	62-5450		1,701.00
12822677	03/07/2024	CRF Consulting - Cindy Fellows	62-5800		446.25
12822678	03/07/2024	Comcast	62-5900		292.60
12822679	03/07/2024	Comcast	62-5900		195.99
12822680	03/07/2024	Crystal Springs Water Co.	62-5500		22.50
12822681	03/07/2024	EDUK8	62-5800		2,805.00
12822682	03/07/2024	Monterey Bay Eco Tours Wendy Kitchell	62-5800		860.00
12822683	03/07/2024	PG&E	62-5500		552.68
12822684	03/07/2024	US Bank Corporate Payment System	62-4300	2,662.71	
			62-5800	29.00	
			62-5900	111.25	2,802.96
Total Number of Checks			21		23,039.21

Fund Recap

Fund	Description	Check Count	Expensed Amount
62	Charter School Enterprise	21	23,039.21
	Total Number of Checks	21	23,039.21
	Less Unpaid Tax Liability		.00
	Net (Check Amount)		23,039.21

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

Big Sur Charter School

**2023 – 2024
Second Interim Report**

Big Sur Charter School

2023 - 2024 Second Interim

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Charter Number: _____ 1000

To the chartering authority and the county superintendent of schools (or only to the county superintendent of schools if the county board of education is the chartering authority):

2023-24 CHARTER SCHOOL INTERIM REPORT: This report is hereby filed by the charter school pursuant to Education Code Section 47604.33(a).

Signed: _____

Date: _____

Charter School Official
(Original signature required)

Printed Name: Aimee Alling

Title: Director

For additional information on the interim report, please contact:

Charter School Contact:

Cindy Fellows

Name

CBO

Title

831-682-1676

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Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	944,956.00	988,633.00	281,615.88	988,633.00	0.00	0.0%
2) Federal Revenue		8100-8299	12,265.00	12,323.00	(29,782.00)	12,323.00	0.00	0.0%
3) Other State Revenue		8300-8599	63,741.00	141,355.00	102,936.31	141,355.00	0.00	0.0%
4) Other Local Revenue		8600-8799	98,887.00	109,425.00	54,225.01	109,425.00	0.00	0.0%
5) TOTAL, REVENUES			1,119,849.00	1,251,736.00	408,995.20	1,251,736.00		
B. EXPENSES								
1) Certificated Salaries		1000-1999	419,857.00	354,901.00	201,208.79	354,901.00	0.00	0.0%
2) Classified Salaries		2000-2999	161,748.00	225,096.00	127,710.38	225,096.00	0.00	0.0%
3) Employee Benefits		3000-3999	240,965.00	228,055.00	141,233.13	228,055.00	0.00	0.0%
4) Books and Supplies		4000-4999	60,456.00	87,439.00	42,392.85	87,439.00	0.00	0.0%
5) Services and Other Operating Expenses		5000-5999	268,641.00	314,848.00	138,777.73	314,848.00	0.00	0.0%
6) Depreciation and Amortization		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299, 7400-7499	11,355.00	12,103.00	0.00	12,103.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENSES			1,163,022.00	1,222,442.00	651,322.88	1,222,442.00		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			(43,173.00)	29,294.00	(242,327.68)	29,294.00		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		
E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)			(43,173.00)	29,294.00	(242,327.68)	29,294.00		
F. NET POSITION								
1) Beginning Net Position								
a) As of July 1 - Unaudited		9791	319,873.00	390,339.00		390,339.00	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			319,873.00	390,339.00		390,339.00		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Net Position (F1c + F1d)			319,873.00	390,339.00		390,339.00		
2) Ending Net Position, June 30 (E + F1e)			276,700.00	419,633.00		419,633.00		
Components of Ending Net Position								
a) Net Investment in Capital Assets		9796	0.00	0.00		0.00		
b) Restricted Net Position		9797	121,269.00	90,269.00		90,269.00		
c) Unrestricted Net Position		9790	155,431.00	329,364.00		329,364.00		
LCFF SOURCES								
Principal Apportionment								
State Aid - Current Year		8011	353,365.00	382,089.00	146,752.00	382,089.00	0.00	0.0%



Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Education Protection Account State Aid - Current Year		8012	145,376.00	125,761.00	8,426.00	125,761.00	0.00	0.0%
State Aid - Prior Years		8019	0.00	0.00	(152,416.00)	0.00	0.00	0.0%
LCFF Transfers								
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.00	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	446,215.00	480,783.00	278,853.88	480,783.00	0.00	0.0%
Property Taxes Transfers		8097	0.00	0.00	0.00	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			944,956.00	988,633.00	281,615.88	988,633.00	0.00	0.0%
FEDERAL REVENUE								
Maintenance and Operations		8110	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education Entitlement		8181	12,265.00	12,323.00	(24,170.00)	12,323.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	(5,612.00)	0.00	0.00	0.0%
Child Nutrition Programs		8220	0.00	0.00	0.00	0.00	0.00	0.0%
Donated Food Commodities		8221	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Title I, Part A, Basic	3010	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	0.00	0.00	0.00	0.00	0.00	0.0%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.00	0.00	0.00	0.0%
	3040,							
	3060,							
	3061,							
	3150,							
	3155,							
	3180,							
Other NCLB / Every Student Succeeds Act	3182,	8290					0.00	
	4037,							
	4124,							
	4126,							
	4127,							
	4128,							
	5630		0.00	0.00	0.00	0.00		0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			12,265.00	12,323.00	(29,782.00)	12,323.00	0.00	0.0%
OTHER STATE REVENUE								
Other State Apportionments								
Special Education Master Plan								
Current Year	6500	8311	0.00	0.00	0.00	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.00	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00	0.00	0.0%
Mandated Costs Reimbursements		8550	1,570.00	1,665.00	1,665.00	1,665.00	0.00	0.0%
Lottery - Unrestricted and Instructional Materials		8560	19,972.00	21,482.00	8,861.31	21,482.00	0.00	0.0%
After School Education and Safety (ASES)	6010	8590	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Charter School Facility Grant	6030	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.00	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Specialized Secondary	7370	8590	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	42,199.00	118,208.00	92,410.00	118,208.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			63,741.00	141,355.00	102,936.31	141,355.00	0.00	0.0%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	4,000.00	4,000.00	1,095.92	4,000.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.00	0.00	0.00	0.0%
Fees and Contracts								
Child Development Parent Fees		8673	0.00	0.00	0.00	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
All Other Local Revenue		8699	29,400.00	34,365.00	22,466.09	34,365.00	0.00	0.0%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Apportionments								
Special Education SELPA Transfers								
From Districts or Charter Schools	6500	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6500	8792	65,487.00	71,060.00	30,663.00	71,060.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments								
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			98,887.00	109,425.00	54,225.01	109,425.00	0.00	0.0%
TOTAL, REVENUES			1,119,849.00	1,251,736.00	408,995.20	1,251,736.00		
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	359,854.00	297,823.00	169,164.76	297,823.00	0.00	0.0%
Certificated Pupil Support Salaries		1200	0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Supervisors' and Administrators' Salaries		1300	60,003.00	57,078.00	32,044.03	57,078.00	0.00	0.0%
Other Certificated Salaries		1900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			419,857.00	354,901.00	201,208.79	354,901.00	0.00	0.0%
CLASSIFIED SALARIES								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Classified Instructional Salaries		2100	128,043.00	192,296.00	108,577.00	192,296.00	0.00	0.0%
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	33,705.00	32,800.00	19,133.38	32,800.00	0.00	0.0%
Other Classified Salaries		2900	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			161,748.00	225,096.00	127,710.38	225,096.00	0.00	0.0%
EMPLOYEE BENEFITS								
STRS		3101-3102	115,980.00	106,111.00	73,255.85	106,111.00	0.00	0.0%
PERS		3201-3202	38,621.00	38,055.00	20,644.68	38,055.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	12,937.00	13,902.00	8,026.64	13,902.00	0.00	0.0%
Health and Welfare Benefits		3401-3402	58,729.00	58,600.00	34,407.26	58,600.00	0.00	0.0%
Unemployment Insurance		3501-3502	2,953.00	664.00	164.78	664.00	0.00	0.0%
Workers' Compensation		3601-3602	6,252.00	4,874.00	1,688.00	4,874.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	5,493.00	5,849.00	3,045.92	5,849.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			240,965.00	228,055.00	141,233.13	228,055.00	0.00	0.0%
BOOKS AND SUPPLIES								
Approved Textbooks and Core Curricula Materials		4100	22,454.00	22,118.00	22,085.45	22,118.00	0.00	0.0%
Books and Other Reference Materials		4200	100.00	316.00	157.59	316.00	0.00	0.0%
Materials and Supplies		4300	37,902.00	65,005.00	20,149.81	65,005.00	0.00	0.0%
Noncapitalized Equipment		4400	0.00	0.00	0.00	0.00	0.00	0.0%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			60,456.00	87,439.00	42,392.85	87,439.00	0.00	0.0%
SERVICES AND OTHER OPERATING EXPENSES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	4,963.00	14,281.00	3,565.28	14,281.00	0.00	0.0%
Dues and Memberships		5300	1,500.00	1,500.00	500.00	1,500.00	0.00	0.0%
Insurance		5400-5450	28,493.00	28,493.00	13,277.18	28,493.00	0.00	0.0%
Operations and Housekeeping Services		5500	16,482.00	16,482.00	6,344.90	16,482.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	100,222.00	100,222.00	61,648.28	100,222.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	105,981.00	142,870.00	47,601.86	142,870.00	0.00	0.0%
Communications		5900	11,000.00	11,000.00	5,840.23	11,000.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENSES			268,641.00	314,848.00	138,777.73	314,848.00	0.00	0.0%
DEPRECIATION AND AMORTIZATION								
Depreciation Expense		6900	0.00	0.00	0.00	0.00	0.00	0.0%
Amortization Expense-Lease Assets		6910	0.00	0.00	0.00	0.00	0.00	0.0%
Amortization Expense-Subscription Assets		6920	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, DEPRECIATION AND AMORTIZATION			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.00	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments								
Payments to Districts or Charter Schools		7141	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers Out								
All Other Transfers		7281-7283	11,355.00	12,103.00	0.00	12,103.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			11,355.00	12,103.00	0.00	12,103.00	0.00	0.0%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs		7310	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENSES			1,163,022.00	1,222,442.00	651,322.88	1,222,442.00		
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Other Sources								
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES								
(a - b + c - d + e)			0.00	0.00	0.00	0.00		

Resource	Description	2023-24 Projected Totals
6230	California Clean Energy Jobs Act	15,269.00
7338	College Readiness Block Grant	75,000.00
Total, Restricted Net Position		90,269.00

Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
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C. CHARTER SCHOOL ADA

Authorizing LEAs reporting charter school SACS financial data in their Fund 01, 09, or 62 use this worksheet to report ADA for those charter schools.

Charter schools reporting SACS financial data separately from their authorizing LEAs in Fund 01 or Fund 62 use this worksheet to report their ADA.

FUND 01: Charter School ADA corresponding to SACS financial data reported in Fund 01.

1. Total Charter School Regular ADA	84.27	86.40	86.40	86.40	0.00	0.0%
2. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils					0.00	
b. Juvenile Halls, Homes, and Camps					0.00	
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]					0.00	
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C2a through C2c)	0.00	0.00	0.00	0.00	0.00	0.0%
3. Charter School Funded County Program ADA						
a. County Community Schools					0.00	
b. Special Education-Special Day Class					0.00	
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. Total, Charter School Funded County Program ADA (Sum of Lines C3a through C3e)	0.00	0.00	0.00	0.00	0.00	0.0%
4. TOTAL CHARTER SCHOOL ADA (Sum of Lines C1, C2d, and C3f)	84.27	86.40	86.40	86.40	0.00	0.0%

FUND 09 or 62: Charter School ADA corresponding to SACS financial data reported in Fund 09 or Fund 62.

5. Total Charter School Regular ADA					0.00	
6. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils					0.00	
b. Juvenile Halls, Homes, and Camps					0.00	
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]					0.00	
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C6a through C6c)	0.00	0.00	0.00	0.00	0.00	0.0%
7. Charter School Funded County Program ADA						
a. County Community Schools					0.00	
b. Special Education-Special Day Class					0.00	
c. Special Education-NPS/LCI					0.00	
d. Special Education Extended Year					0.00	
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools					0.00	
f. Total, Charter School Funded County Program ADA						

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Description	ESTIMATED FUNDED ADA Original Budget (A)	ESTIMATED FUNDED ADA Board Approved Operating Budget (B)	ESTIMATED P-2 REPORT ADA Projected Year Totals (C)	ESTIMATED FUNDED ADA Projected Year Totals (D)	DIFFERENCE (Col. D - B) (E)	PERCENTAGE DIFFERENCE (Col. E / B) (F)
Program ADA (Sum of Lines C7a through C7e)	0.00	0.00	0.00	0.00	0.00	0.0%
8. TOTAL CHARTER SCHOOL ADA (Sum of Lines C5, C6d, and C7f)	0.00	0.00	0.00	0.00	0.00	0.0%
9. TOTAL CHARTER SCHOOL ADA Reported In Fund 01, 09, or 62 (Sum of Lines C4 and C8)	84.27	86.40	86.40	86.40	0.00	0.0%

Description	Object	Beginning Balances (Ref. Only)	ACTUALS THROUGH THE MONTH OF (Enter Month Name):											
			July	August	September	October	November	December	January	February				
A. BEGINNING CASH													164,770.71	
B. RECEIPTS														
LCFF/Revenue Limit Sources														
Principal Apportionment	8010-8019		11,533.00	11,533.00	24,973.00	20,760.00	20,760.00	20,760.00	136,566.31	72,210.21	125,461.83	45,733.00	51,485.00	
Property Taxes	8020-8079													
Miscellaneous Funds	8080-8099			86,540.86						115,387.81	76,925.21		38,462.60	
Federal Revenue	8100-8299									(29,782.00)				
Other State Revenue	8300-8599		341.00	341.00	56,885.00	19,574.61	19,574.61	2,279.00	2,279.00	14,935.98	8,579.72			
Other Local Revenue	8600-8799			15,752.00	6,267.10	3,848.54	3,848.54	1,289.09	1,289.09	20,422.93	6,645.35		7,060.05	
Interfund Transfers In	8910-8929													
All Other Financing Sources	8930-8979													
TOTAL RECEIPTS			11,874.00	27,626.00	174,665.96	44,183.15	44,183.15	24,328.09	24,328.09	(11,565.28)	137,883.28	97,007.65		
C. DISBURSEMENTS														
Certificated Salaries	1000-1999		10,013.75	20,728.01	38,503.31	32,503.31	32,503.31	32,503.31	32,503.31	34,004.71	32,952.39	34,884.75		
Classified Salaries	2000-2999		6,833.34	12,831.07	23,978.76	19,792.89	19,792.89	20,995.08	20,995.08	23,267.24	20,012.00	21,721.50		
Employee Benefits	3000-3999		5,701.90	11,481.25	16,073.32	16,938.01	16,938.01	16,748.44	16,748.44	57,591.83	16,698.38	15,157.06		
Books and Supplies	4000-4999		14,779.86	16,205.14	4,537.69	1,241.58	1,241.58	1,962.35	1,962.35	0.00	3,666.23	202.91		
Services	5000-5999		19,098.70	15,128.59	22,808.42	21,655.64	21,655.64	19,588.10	19,588.10	11,532.66	28,965.60	27,190.37		
Capital Outlay	6000-6999													
Other Outgo	7000-7499													
Interfund Transfers Out	7600-7629													
All Other Financing Uses	7630-7699													
TOTAL DISBURSEMENTS			56,427.55	76,374.06	105,901.50	92,131.43	92,131.43	91,797.28	91,797.28	126,396.46	102,294.60	99,156.59		
D. BALANCE SHEET ITEMS														
Assets and Deferred Outflows														
Cash Not In Treasury	9111-9199													
Accounts Receivable	9200-9299	216,269.51												
Due From Other Funds	9310			12,591.66	19,516.85	19,516.85	19,516.85	281.20	281.20	183,879.80				
Stores	9320													
Prepaid Expenditures	9330													
Other Current Assets	9340													

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Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
Lease Receivable	9380									
Deferred Outflows of Resources	9490									
SUBTOTAL		216,269.51	0.00	0.00	12,591.66	19,516.85	281.20	183,879.80	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599	59,151.43	18,229.73	16,202.80	2,649.19	19,193.24	(2,974.89)	(7,190.56)	(3,720.20)	(1,694.10)
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650	58,755.03		58,755.03						
Deferred Inflows of Resources	9690									
SUBTOTAL		117,906.46	18,229.73	16,202.80	61,404.22	19,193.24	(2,974.89)	(7,190.56)	(3,720.20)	(1,694.10)
<u>Nonoperating</u>										
Suspense Clearing	9910			(369.60)		369.60	(143.00)	143.00		
TOTAL BALANCE SHEET ITEMS		98,363.05	(18,229.73)	(16,572.40)	(48,812.56)	693.21	3,113.09	191,213.36	3,720.20	1,694.10
E. NET INCREASE/DECREASE (B - C + D)			(62,783.28)	(65,320.46)	19,951.90	(47,255.07)	(64,356.10)	53,251.62	39,308.88	(454.84)
F. ENDING CASH (A + E)			229,189.94	163,869.48	183,821.38	136,566.31	72,210.21	125,461.83	164,770.71	164,315.87
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

(=)

Description	Object	ACTUALS THROUGH THE MONTH OF (Enter Month Name):						TOTAL	BUDGET
		March	April	May	June	Accruals	Adjustments		
A. BEGINNING CASH									
	November	164,315.87	192,337.64	187,495.36	175,438.25				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019	51,485.00	51,485.00	51,485.00	51,485.00	247,663.00		507,850.00	507,850.00
Property Taxes	8020-8079							0.00	0.00
Miscellaneous Funds	8080-8099	62,502.18	33,654.78	33,654.78	33,654.78	0.00		480,783.00	480,783.00
Federal Revenue	8100-8299				29,782.00	12,323.00		12,323.00	12,323.00
Other State Revenue	8300-8599	8,000.00	12,932.00		16,354.00	1,132.69		141,355.00	141,355.00
Other Local Revenue	8600-8799	0.00	8,700.00	16,854.00	14,242.00	8,343.94		109,425.00	109,425.00
Interfund Transfers In	8810-8929								
All Other Financing Sources	8930-8979							0.00	0.00
TOTAL RECEIPTS		121,987.18	106,771.78	101,993.78	145,517.78	269,462.63	0.00	1,251,736.00	1,251,736.00
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	28,000.00	30,000.00	30,000.00	28,000.00	2,807.46		354,901.00	354,901.00
Classified Salaries	2000-2999	18,000.00	18,000.00	20,000.00	19,164.12	500.00		225,096.00	225,096.00
Employee Benefits	3000-3999	17,000.00	17,000.00	19,436.84	17,910.97	317.00		228,055.00	228,055.00
Books and Supplies	4000-4999	2,000.00	14,000.00	10,000.00	12,251.38	6,591.86		87,439.00	87,439.00
Services	5000-5999	24,351.35	28,000.00	30,000.00	35,000.00	31,528.55		314,848.00	314,848.00
Capital Outlay	6000-6999							0.00	0.00
Other Outgo	7000-7499					12,103.00		12,103.00	12,103.00
Interfund Transfers Out	7600-7629							0.00	0.00
All Other Financing Uses	7630-7699							0.00	0.00
TOTAL DISBURSEMENTS		89,351.35	107,000.00	109,436.84	112,326.47	53,847.87	0.00	1,222,442.00	1,222,442.00
D. BALANCE SHEET ITEMS									
Assets and Deferred Outflows									
Cash Not In Treasury	9111-9199							0.00	0.00
Accounts Receivable	9200-9299							216,269.51	216,269.51
Due From Other Funds	9310							0.00	0.00
Stores	9320							0.00	0.00
Prepaid Expenditures	9330							0.00	0.00
Other Current Assets	9340							0.00	0.00
Lease Receivable	9380							0.00	0.00

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Description	Object	2023-24 Budget					TOTAL	BUDGET
		March	April	May	June	Accruals		
Deferred Outflows of Resources	9490						0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	216,269.51	
<u>Liabilities and Deferred Inflows</u>								
Accounts Payable	9500-9599	4,614.06	4,614.06	4,614.05	4,614.05		59,151.43	
Due To Other Funds	9610						0.00	
Current Loans	9640						0.00	
Unearned Revenues	9650						58,755.03	
Deferred Inflows of Resources	9690						0.00	
SUBTOTAL		4,614.06	4,614.06	4,614.05	4,614.05	0.00	117,906.46	
<u>Nonoperating</u>								
Suspense Clearing	9910						0.00	
TOTAL BALANCE SHEET ITEMS		(4,614.06)	(4,614.06)	(4,614.05)	(4,614.05)	0.00	98,363.05	
E. NET INCREASE/DECREASE (B - C + D)		28,021.77	(4,842.28)	(12,057.11)	28,577.26	215,614.76	127,657.05	29,294.00
F. ENDING CASH (A + E)		192,337.64	187,495.36	175,438.25	204,015.51			
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS							419,630.27	

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Part I - General Administrative Share of Plant Services Costs

California's indirect cost plan allows that the general administrative costs in the indirect cost pool may include that portion of plant services costs (maintenance and operations costs and facilities rents and leases costs) attributable to the general administrative offices. The calculation of the plant services costs attributed to general administration and included in the pool is standardized and automated using the percentage of salaries and benefits relating to general administration as proxy for the percentage of square footage occupied by general administration.

A. Salaries and Benefits - Other General Administration and Centralized Data Processing

1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 7200-7700, goals 0000 and 9000) 0.00
2. Contracted general administrative positions not paid through payroll _____
 - a. Enter the costs, if any, of general administrative positions performing services ON SITE but paid through a contract, rather than through payroll, in functions 7200-7700, goals 0000 and 9000, Object 5800. _____
 - b. If an amount is entered on Line A2a, provide the title, duties, and approximate FTE of each general administrative position paid through a contract. Retain supporting documentation in case of audit.

B. Salaries and Benefits - All Other Activities

1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 1000-6999, 7100-7180, & 8100-8400; Functions 7200-7700, all goals except 0000 & 9000) 808,052.00

C. Percentage of Plant Services Costs Attributable to General Administration

- (Line A1 plus Line A2a, divided by Line B1; zero if negative) (See Part III, Lines A5 and A6) 0.00%

Part II - Adjustments for Employment Separation Costs

When an employee separates from service, the local educational agency (LEA) may incur costs associated with the separation in addition to the employee's regular salary and benefits for the final pay period. These additional costs can be categorized as "normal" or "abnormal or mass" separation costs.

Normal separation costs include items such as pay for accumulated unused leave or routine severance pay authorized by governing board policy. Normal separation costs are not allowable as direct costs to federal programs, but are allowable as indirect costs. State programs may have similar restrictions. Where federal or state program guidelines required that the LEA charge an employee's normal separation costs to an unrestricted resource rather than to the restricted program in which the employee worked, the LEA may identify and enter these costs on Line A for inclusion in the indirect cost pool.

Abnormal or mass separation costs are those costs resulting from actions taken by an LEA to influence employees to terminate their employment earlier than they normally would have. Abnormal or mass separation costs include retirement incentives such as a Golden Handshake or severance packages negotiated to effect termination. Abnormal or mass separation costs may not be charged to federal programs as either direct costs or indirect costs. Where an LEA paid abnormal or mass separation costs on behalf of positions in general administrative functions included in the indirect cost pool, the LEA must identify and enter these costs on Line B for exclusion from the pool.

A. Normal Separation Costs (optional)

Enter any normal separation costs paid on behalf of employees of restricted state or federal programs that were charged to an unrestricted resource (0000-1999) in funds 01, 09, and 62 with functions 1000-6999 or 8100-8400 rather than to the restricted program. These costs will be moved in Part III from base costs to the indirect cost pool. Retain supporting documentation. _____

B. Abnormal or Mass Separation Costs (required)

Enter any abnormal or mass separation costs paid on behalf of general administrative positions charged to unrestricted resources (0000-1999) in funds 01, 09, and 62 with functions 7200-7700. These costs will be moved in Part III from the indirect cost pool to base costs. If none, enter zero. 0.00

Part III - Indirect Cost Rate Calculation (Funds 01, 09, and 62, unless indicated otherwise)

A. Indirect Costs

1. Other General Administration, less portion charged to restricted resources or specific goals
(Functions 7200-7600, objects 1000-5999, minus Line B9) 29,693.00
2. Centralized Data Processing, less portion charged to restricted resources or specific goals
(Function 7700, objects 1000-5999, minus Line B10) 0.00

(14)

3. External Financial Audit - Single Audit (Function 7190, resources 0000-1999, goals 0000 and 9000, objects 5000 - 5999)	0.00
4. Staff Relations and Negotiations (Function 7120, resources 0000-1999, goals 0000 and 9000, objects 1000 - 5999)	0.00
5. Plant Maintenance and Operations (portion relating to general administrative offices only) (Functions 8100-8400, objects 1000-5999 except 5100, times Part I, Line C)	0.00
6. Facilities Rents and Leases (portion relating to general administrative offices only) (Function 8700, resources 0000-1999, objects 1000-5999 except 5100, times Part I, Line C)	0.00
7. Adjustment for Employment Separation Costs	
a. Plus: Normal Separation Costs (Part II, Line A)	0.00
b. Less: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
8. Total Indirect Costs (Lines A1 through A7a, minus Line A7b)	29,693.00
9. Carry-Forward Adjustment (Part IV, Line F)	21,224.59
10. Total Adjusted Indirect Costs (Line A8 plus Line A9)	50,917.59
B. Base Costs	
1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	837,970.00
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	180,220.00
3. Pupil Services (Functions 3000-3999, objects 1000-5999 except 4700 and 5100)	26,911.00
4. Ancillary Services (Functions 4000-4999, objects 1000-5999 except 5100)	0.00
5. Community Services (Functions 5000-5999, objects 1000-5999 except 5100)	0.00
6. Enterprise (Function 6000, objects 1000-5999 except 4700 and 5100)	0.00
7. Board and Superintendent (Functions 7100-7180, objects 1000-5999, minus Part III, Line A4)	226.00
8. External Financial Audit - Single Audit and Other (Functions 7190-7191, objects 5000 - 5999, minus Part III, Line A3)	5,300.00
9. Other General Administration (portion charged to restricted resources or specific goals only) (Functions 7200-7600, resources 2000-9999, objects 1000-5999; Functions 7200-7600, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
10. Centralized Data Processing (portion charged to restricted resources or specific goals only) (Function 7700, resources 2000-9999, objects 1000-5999; Function 7700, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
11. Plant Maintenance and Operations (all except portion relating to general administrative offices) (Functions 8100-8400, objects 1000-5999 except 5100, minus Part III, Line A5)	37,703.00
12. Facilities Rents and Leases (all except portion relating to general administrative offices) (Function 8700, objects 1000-5999 except 5100, minus Part III, Line A6)	92,316.00
13. Adjustment for Employment Separation Costs	
a. Less: Normal Separation Costs (Part II, Line A)	0.00
b. Plus: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
14. Student Activity (Fund 08, functions 4000-5999, objects 1000-5999 except 5100)	0.00
15. Adult Education (Fund 11, functions 1000-6999, 8100-8400, and 8700, objects 1000-5999 except 5100)	0.00
16. Child Development (Fund 12, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
17. Cafeteria (Funds 13 & 61, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
18. Foundation (Funds 19 & 57, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
19. Total Base Costs (Lines B1 through B12 and Lines B13b through B18, minus Line B13a)	1,180,646.00
C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment (For information only - not for use when claiming/recovering indirect costs) (Line A8 divided by Line B19)	
	2.51%
D. Preliminary Proposed Indirect Cost Rate (For final approved fixed-with-carry-forward rate for use in 2025-26 see www.cde.ca.gov/fg/ac/ic) (Line A10 divided by Line B19)	
	4.31%
Part IV - Carry-forward Adjustment	
The carry-forward adjustment is an after-the-fact adjustment for the difference between indirect costs recoverable using the indirect cost rate approved for use in a given year, and the actual indirect costs incurred in that year. The carry-forward adjustment eliminates	

the need for LEAs to file amended federal reports when their actual indirect costs vary from the estimated indirect costs on which the approved rate was based.

Where the ratio of indirect costs incurred in the current year is less than the estimated ratio of indirect costs on which the approved rate for use in the current year was based, the carry-forward adjustment is limited by using either the approved rate times current year base costs, or the highest rate actually used to recover costs from any program times current year base costs, if the highest rate used was less than the approved rate. Rates used to recover costs from programs are displayed in Exhibit A.

A. Indirect costs incurred in the current year (Part III, Line A8)	29,693.00
B. Carry-forward adjustment from prior year(s)	
1. Carry-forward adjustment from the second prior year	32.24
2. Carry-forward adjustment amount deferred from prior year(s), if any	0.00
C. Carry-forward adjustment for under- or over-recovery in the current year	
1. Under-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus (approved indirect cost rate (0.72%) times Part III, Line B19); zero if negative	21,224.59
2. Over-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus the lesser of (approved indirect cost rate (0.72%) times Part III, Line B19) or (the highest rate used to recover costs from any program (0%) times Part III, Line B19); zero if positive	0.00
D. Preliminary carry-forward adjustment (Line C1 or C2)	21,224.59
E. Optional allocation of negative carry-forward adjustment over more than one year	
Where a negative carry-forward adjustment causes the proposed approved rate to fall below zero or would reduce the rate at which the LEA could recover indirect costs to such an extent that it would cause the LEA significant fiscal harm, the LEA may request that the carry-forward adjustment be allocated over more than one year. Where allocation of a negative carry-forward adjustment over more than one year does not resolve a negative rate, the CDE will work with the LEA on a case-by-case basis to establish an approved rate.	
Option 1. Preliminary proposed approved rate (Part III, Line D) if entire negative carry-forward adjustment is applied to the current year calculation:	not applicable
Option 2. Preliminary proposed approved rate (Part III, Line D) if one-half of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
Option 3. Preliminary proposed approved rate (Part III, Line D) if one-third of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
LEA request for Option 1, Option 2, or Option 3	1
F. Carry-forward adjustment used in Part III, Line A9 (Line D minus amount deferred if Option 2 or Option 3 is selected)	21,224.59

Approved indirect cost rate: 0.72%
 Highest rate used in any program: 0.00%

Fund	Resource	Eligible Expenditures (Objects 1000-5999 except 4700 & 5100)	Indirect Costs Charged (Objects 7310 and 7350)	Rate Used
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Section I - Expenditures	Funds 01, 09, and 62			2023-24 Expenditures
	Goals	Functions	Objects	
A. Total state, federal, and local expenditures (all resources)	All	All	1000-7999	1,222,442.00
B. Less all federal expenditures not allowed for MOE (Resources 3000-5999, except 3385)	All	All	1000-7999	12,323.00
C. Less state and local expenditures not allowed for MOE: (All resources, except federal as identified in Line B)				
1. Community Services	All	5000-5999	1000-7999	0.00
2. Capital Outlay	All except 7100-7199	All except 5000-5999	6000-6999 except 6600, 6910	0.00
3. Debt Service	All	9100	5400-5450, 5800, 7430-7439	0.00
4. Other Transfers Out	All	9200	7200-7299	12,103.00
5. Interfund Transfers Out	All	9300	7600-7629	0.00
6. All Other Financing Uses	All	9100	7699	0.00
		9200	7651	
7. Nonagency	7100-7199	All except 5000-5999, 9000-9999	1000-7999	0.00
8. Tuition (Revenue, in lieu of expenditures, to approximate costs of services for which tuition is received)	All	All	8710	0.00

9. Supplemental expenditures made as a result of a Presidentially declared disaster	Manually entered. Must not include expenditures in lines B, C1-C8, D1, or D2.		0.00
10. Total state and local expenditures not allowed for MOE calculation (Sum lines C1 through C9)			12,103.00
D. Plus additional MOE expenditures:	All	All	1000-7143, 7300-7439 minus 8000-8699
1. Expenditures to cover deficits for food services (Funds 13 and 61) (If negative, then zero)			0.00
2. Expenditures to cover deficits for student body activities	Manually entered. Must not include expenditures in lines A or D1.		0.00
E. Total expenditures subject to MOE (Line A minus lines B and C10, plus lines D1 and D2)			1,198,016.00
Section II - Expenditures Per ADA			2023-24 Annual ADA/Exps. Per ADA
A. Average Daily Attendance (Form AI, Column C, Line C9)*			86.40
B. Expenditures per ADA (Line I.E divided by Line II.A)			13,865.93
Section III - MOE Calculation (For data collection only. Final determination will be done by CDE)	Total		Per ADA

<p>A. Base expenditures (Preloaded expenditures extracted from prior year Unaudited Actuals MOE Calculation) (Note: If the prior year MOE was not met, in its final determination, CDE will adjust the prior year base to 90 percent of the preceding prior year amount rather than the actual prior year expenditure amount.)</p>		
<p>1. Adjustment to base expenditure and expenditure per ADA amounts for LEAs failing prior year MOE calculation (From Section IV)</p>		
<p>2. Total adjusted base expenditure amounts (Line A plus Line A.1)</p>		
<p>B. Required effort (Line A.2 times 90%)</p>		
<p>C. Current year expenditures (Line I.E and Line II.B)</p>		
<p>D. MOE deficiency amount, if any (Line B minus Line C) (If negative, then zero)</p>		
	1,086,075.60	13,061.64
	0.00	0.00
	1,086,075.60	13,061.64
	977,468.04	11,755.48
	1,198,016.00	13,865.93
	0.00	0.00

<p>E. MOE determination (If one or both of the amounts in line D are zero, the MOE requirement is met; if both amounts are positive, the MOE requirement is not met. If either column in Line A.2 or Line C equals zero, the MOE calculation is incomplete.)</p>	MOE Met	
<p>F. MOE deficiency percentage, if MOE not met; otherwise, zero (Line D divided by Line B) (Funding under ESSA covered programs in FY 2025-26 may be reduced by the lower of the two percentages)</p>	0.00%	0.00%
<p>*Interim Periods - Annual ADA not available from Form AI. For your convenience, Projected Year Totals Estimated Funded ADA has been preloaded. Manual adjustment may be required to reflect estimated Annual ADA.</p>		

SECTION IV - Detail of Adjustments to Base Expenditures (used in Section III, Line A.1)

Description of Adjustments	Total Expenditures	Expenditures Per ADA
Total adjustments to base expenditures	0.00	0.00

Second Interim
Projected Totals 2023-24
Technical Review Checks
Phase - All
Display - Exceptions Only

Big Sur Charter

Monterey County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

GENERAL LEDGER CHECKS

OBJ-POSITIVE - (Warning) - The following objects have a negative balance by resource, by fund:

Exception

FUND	RESOURCE	OBJECT	VALUE
62	7435	8590	(\$6,739.00)

Explanation: The state issues all revenue for this program in 22-23. In 23-24 the state decreased the program's allocation. The balance from prior year was in the resource codes beginning fund balance. The result of the state reducing the allocation was a negative revenue entry.

REV-POSITIVE - (Warning) - In the following resources, total revenues exclusive of contributions (objects 8000-8979) are negative, by fund:

Exception

FUND	RESOURCE	VALUE
62	7435	(\$6,739.00)

Explanation: The state issues all revenue for this program in 22-23. In 23-24 the state decreased the program's allocation. The balance from prior year was in the resource codes beginning fund balance. The result of the state reducing the allocation was a negative revenue entry.

22

Big Sur Charter School Multiyear Projections: 23-24 Second Interim

Description	Object	23-24	24-25	25-26	Notes:
Enrollment		90.00	90.00	90.00	
Unduplicated		27.00	27.00	27.00	
ADA		86.40	86.40	86.40	ADA is based on current year numbers.
Per student LCFF income		\$ 11,442.51	\$ 11,489.94	\$ 11,828.30	
Revenues					
Revenue Limit/LCFF Funding	8011-8099	\$ 988,633	\$ 992,731	\$ 1,021,965	LCFF version 24.2c dated 12/1/23
Federal Income: SPED	8100-8299	\$ 12,323	\$ 12,323	\$ 12,323	
Other State Income: Mandated Costs, Lottery, SPED Mental Health, STRS on Behalf, Covid	8300-8599	\$ 141,355	\$ 63,836	\$ 63,836	24-25 delete pty lottery adjustment \$1,510. Delete pre-school \$56,271 & Art & Music \$26,477, Add back in Learning recovery deduction \$6,739. Total decrease \$77,519.
Other Local Income: Interest, donations, SPED, Coastal Stewardship	8600-8799	\$ 109,425	\$ 96,941	\$ 96,941	23-24: Dec. donations \$10,000 and increase SPED \$5,573. 24-25 Decrease donations \$12,484 due to spending down of carryover.
Total Revenues		\$ 1,251,736	\$ 1,165,831	\$ 1,195,065	
Expenditures					
Certificated Salaries	1000-1999	\$ 354,901	\$ 360,725	\$ 366,649	23-24: Decr. Supp. teachers \$7,485 & reclass to aides. Steps: 24-25 = \$5,824 and 25-26= \$5,924.
Classified Salaries	2000-2999	\$ 225,096	\$ 226,943	\$ 227,802	23-24: Dec. Inc. Coastal Stew. For actuals. Steps: 24-25 = \$1,847 and 25-26= \$859.
Benefits	3000-3999	\$ 228,055	\$ 232,558	\$ 235,777	Step benefit increase: 24-25 = \$1,961 & 25-26 = \$1,624. No increases in STRS rates. PERS rates: 24-25= 27.8% \$2,542 & 25-26= 28.5% \$1,595.
Books and Supplies	4000-4999	\$ 87,439	\$ 57,439	\$ 57,439	23-24: Decrease \$3,300 & reclass lottery to rentals 5600. 24-25: Decrease \$30,000 for spending down of restricted. Based on prior year expenditures with less one time funding.
Services & Operating Expenses	5000-5999	\$ 314,848	\$ 274,848	\$ 274,848	24-25 Decrease \$40,000 for spending down of restricted. Based on prior year expenditures with less one time funding.
Administrative Fee at 1%	7100-7499	\$ 12,103	\$ 11,525	\$ 11,625	1% total expenditures paid to Big Sur Unified
Total Expenditures		\$ 1,222,442	\$ 1,164,038	\$ 1,174,140	
Net Increase (Decrease) in Fund		\$ 29,294	\$ 1,793	\$ 20,925	
Beginning Balance		\$ 390,336	\$ 419,630	\$ 421,423	
Ending Balance before deducting Rest.		\$ 419,630	\$ 421,423	\$ 442,348	
Prop 39		\$ 15,269	\$ 15,269	\$ 15,269	
College Readiness		\$ 75,000	\$ 75,000	\$ 75,000	
Total Restricted Balance		\$ 90,269	\$ 90,269	\$ 90,269	
Ending Unrestricted Fund Balance		\$ 329,361	\$ 331,154	\$ 352,079	
Increase/(Decrease) in Unrest. Balance		\$ 120,630	\$ 1,793	\$ 20,925	

23

Big Sur Charter (118349)		1/15/24			
	2020	2022-23	2023-24	2024-25	2025-26
SUMMARY OF FUNDING					
COLA & Augmentation		13.26%	8.22%	0.76%	2.73%
LCFF Entitlement					
Base Grant		\$784,071	\$864,470	\$873,054	\$896,757
Grade Span Adjustment		39,912	57,462	53,862	50,238
Supplemental Grant		41,644	52,089	55,263	56,820
Add-ons: Transitional Kindergarten		5,035	14,612	10,552	18,150
Total LCFF Entitlement		870,662	988,633	992,731	1,021,965
LCFF Entitlement Per ADA	\$	10,333	\$ 11,443	\$ 11,490	\$ 11,828
Components of LCFF By Object Code					
State Aid (Object Code 8011)	\$	324,071	\$ 382,089	\$ 381,577	\$ 394,126
EPA (for LCFF Calculation - Resource 140)	\$	65,808	\$ 125,761	\$ 130,371	\$ 147,056
In-Lieu of Property Taxes (Object Code 8)		480,783	480,783	480,783	480,783
Total LCFF Entitlement		870,662	988,633	992,731	1,021,965
LCAP PERCENTAGE TO INCREASE OR IMPROVE SERVICES					
Base Grant (Excludes add-ons for TIIG and)	\$	823,983	\$ 921,932	\$ 926,916	\$ 946,995
Supplemental and Concentration Grant fur	\$	41,644	\$ 52,089	\$ 55,263	\$ 56,820
Percentage to Increase or Improve Services		5.05%	5.65%	5.96%	6.00%
SUMMARY OF STUDENT POPULATION					
Total Enrollment		85	90	90	90
Total Unduplicated Pupil Count		25	27	27	27
PER-ADA FUNDING LEVELS					
Base, Supplemental and Concentration Rate per ADA					
Grades TK-3	\$	10,630	\$ 11,570	\$ 11,691	\$ 12,015
Grades 4-6	\$	9,774	\$ 10,638	\$ 10,751	\$ 11,048
Grades 7-8	\$	10,064	\$ 10,953	\$ 11,069	\$ 11,375
Base Grants					
Grades TK-3	\$	9,166	\$ 9,919	\$ 9,994	\$ 10,267
Grades 4-6	\$	9,304	\$ 10,069	\$ 10,146	\$ 10,423
Grades 7-8	\$	9,580	\$ 10,367	\$ 10,446	\$ 10,731
Grade Span Adjustment					
Grades TK-3	\$	953	\$ 1,032	\$ 1,039	\$ 1,068
Grades 9-12	\$	289	\$ 312	\$ 315	\$ 323
Prorated Base, Supplemental and Concentration Rate per ADA					
Grades TK-3	\$	10,119	\$ 10,951	\$ 11,033	\$ 11,335
Grades 4-6	\$	9,304	\$ 10,069	\$ 10,146	\$ 10,423
Grades 7-8	\$	9,580	\$ 10,367	\$ 10,446	\$ 10,731
Prorated Grade Span Adjustment					
Grades TK-3	\$	953	\$ 1,032	\$ 1,039	\$ 1,068
Supplemental Grant					
		20%	20%	20%	20%
Maximum - 1.00 ADA, 100% UPP					
Grades TK-3	\$	2,024	\$ 2,190	\$ 2,207	\$ 2,267
Grades 4-6	\$	1,861	\$ 2,014	\$ 2,029	\$ 2,085
Grades 7-8	\$	1,916	\$ 2,073	\$ 2,089	\$ 2,146
Actual - 1.00 ADA, Local UPP as follows:					
		25.27%	28.25%	29.81%	30.00%
Grades TK-3	\$	511	\$ 619	\$ 658	\$ 680
Grades 4-6	\$	470	\$ 569	\$ 605	\$ 625
Grades 7-8	\$	484	\$ 586	\$ 623	\$ 644
Maximum - 1.00 ADA, 100% UPP					
Grades TK-3	\$	6,577	\$ 7,118	\$ 7,171	\$ 7,368
Grades 4-6	\$	6,048	\$ 6,545	\$ 6,595	\$ 6,775
Grades 7-8	\$	6,227	\$ 6,739	\$ 6,790	\$ 6,975

24

LCFF CALCULATOR

118349	5 digit District code or 7 digit School code (from the CDS code)
NO	Is this calculation for a new 23-24 Second interim V24.2c
Charter	Projection Type
	Cindy Fellows
	cindy.fellows1210@gmail.com
1/15/24	Projection Date
	831-682-1676

Big Sur Charter (118349) 2023-24 2024-25 2025-26

(1) UNIVERSAL ASSUMPTIONS

Supplemental Grant %	20.00%	20.00%	20.00%
Statutory COLA	8.22%	0.76%	2.73%
Transitional Kindergarten Add-on (2022-23 forward)	\$ 3,044.23	\$ 3,067.36	\$ 3,151.10
EPA Entitlement as % of statewide adjusted Revenue Limit	44.5599%	44.5599%	44.5599%

(2) CHARTER SCHOOL DATA ELEMENTS REQUIRED TO CALCULATE THE LCFF

(a) TRANSFER OF IN-LIEU PROPERTY TAX

I-4 F-6 / F-7 In-Lieu of Property Tax	480,783	480,783	480,783
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(b) UNDUPLICATED PUPIL PERCENTAGE (UPP)

A-1, A-2, A-3 Enrollment	90	90	90
B-1, B-2, B-3 Unduplicated Pupil Count	27	27	27
Single Year Unduplicated Pupil Percentage	30.00%	30.00%	30.00%
C-1 Unduplicated Pupil Percentage (%)	28.25%	29.81%	30.00%

(c) CONCENTRATION GRANT FUNDING LIMITATION: District of Physical Location

Enter the unduplicated pupil percentage (UPP) of the district where the charter school is physically located. If the charter school is located in multiple districts, enter the UPP for each district.

D-3 Unduplicated Pupil Percentage (%)	69.62%	69.62%	69.62%
Unduplicated Pupil Percentage: Supplemental	28.25%	29.81%	30.00%
Unduplicated Pupil Percentage: Concentration	28.25%	29.81%	30.00%

(d) AVERAGE DAILY ATTENDANCE (ADA)

G-4 TK (NEW beginning 2022-23)	4.80	3.44	5.76
B-1 Grades TK-3	55.68	51.84	47.04
B-2 Grades 4-6	21.12	20.16	27.84
B-3 Grades 7-8	9.60	14.40	11.52
SUBTOTAL ADA	86.40	86.40	86.40
RATIO: ADA to Enrollment	0.96	0.96	0.96

(3) SCHOOL DISTRICT DATA ELEMENTS REQUIRED TO CALCULATE THE LCFF

(b) K-3 GRADE SPAN ADJUSTMENT FUNDING DETERMINATION

Did your district meet the requirements of funding for K-3 grade span adjustment?	YES	YES	YES
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25

BIG SUR CHARTER SCHOOL | 2024-2025 CALENDAR

<p>8-14 Teacher Work Days</p> <p>15-16 Orientation (Schedule TBA)</p> <p>19 First Day of School</p> <p>30 End of LP 1 (10 Days)</p>	<p>AUGUST '24</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </tbody> </table>	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	<p>FEBRUARY '25</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td></td></tr> </tbody> </table>	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		<p>14 End of LP 6 (19 Days)</p> <p>17 Presidents' Day (No School)</p>							
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<p>2 Labor Day (No School)</p> <p>27 End of LP 2 (19 Days)</p>	<p>SEPTEMBER '24</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	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						<p>MARCH '25</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td>31</td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	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						<p>14 End of LP 7 (19 Days)</p> <p>31 Spring Break (No School)</p>
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<p>14-18 Fall Break (No School)</p>	<p>OCTOBER '24</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr> <tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr> <tr><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td></tr> </tbody> </table>	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			<p>APRIL '25</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr> <tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr> <tr><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td></tr> </tbody> </table>	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				<p>1-4 Spring Break (No School)</p> <p>18 End of LP 8 (20 Days)</p>							
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<p>1 End of LP 3 (20 Days)</p> <p>11 Veterans Day (No School)</p> <p>25-29 Thanksgiving Break (No School)</p>	<p>NOVEMBER '24</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td></td><td>1</td><td>2</td></tr> <tr><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> </tbody> </table>	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	<p>MAY '25</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>S</th><th>M</th><th>T</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </tbody> </table>	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	<p>9 End of LP 9 (15 Days)</p> <p>27 Memorial Day (No School)</p> <p>30 End of LP 10 (14 Days) Last Day of School 175 School Days</p>							
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Moss, Levy & Hartzheim LLP

Certified Public Accountants

February 7, 2024

To the Board of Trustees and Aimee Alling, Executive Director
304 Foam St,
Monterey, CA 93940

We are pleased to confirm our understanding of the services we are to provide for Big Sur Charter School for the year ended June 30, 2024.

We will audit the financial statements of Big Sur Charter School, which comprise the statements of financial position as of June 30, 2024, and the related statements of activities and cash flows for the year ended June 30, 2023, and the related notes to the financial statements. Also, the following supplementary information accompanying the financial statements will be subjected to the auditing procedures applied in our 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, in accordance with auditing standards generally accepted in the United States of America, and we will provide an opinion on it in relation to the financial statements as a whole in a report combined with our auditor's report on the financial statements:

- 1) Organization
- 2) Schedule of Average Daily Attendance
- 3) Schedule of Functional Expenses
- 4) Schedule of Instructional Time

Audit Objectives

The objective of our audit is the expression of an opinion about whether your financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion. We will issue a written report upon completion of our audit of Big Sur Charter School's financial statements. Our report will be addressed to the Board of Trustees of Big Sur Charter School. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add an emphasis-of-matter or other-matter paragraph. If our opinion is other than unmodified, we will discuss the reasons with management in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue reports, or we may withdraw from this engagement.

We will also provide a report (which does not include an opinion) on internal control related to the financial statements and compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government Auditing Standards*. The report on internal control and on compliance and other matters will include a paragraph that states that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control on compliance and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that Big Sur Charter School is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit in accordance with generally accepted auditing standards established by the Auditing Standards Board (United States) and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. 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 will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the Organization or to acts by management or employees acting on behalf of the Organization. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will also request written representations from the Organization's attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by generally accepted auditing standards.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of the Organization and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards and *Government Auditing Standards*.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of Big Sur Charter School's compliance with the provisions of applicable laws, regulations, contracts, agreements, and grants. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

Other Services

We will also assist in preparing the financial statements and related notes of the Organization in conformity with U.S. generally accepted accounting principles based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Management Responsibilities

Management is responsible for (1) establishing and maintaining effective internal controls, including monitoring ongoing activities and for helping to ensure that appropriate goals and objectives are met; (2) following laws and regulations; and (3) ensuring that management is reliable and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements and all accompanying information in conformity with U.S. generally accepted accounting principles; and for compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) additional information that we may request for the purpose of the audit, and (3) unrestricted access to persons within the organization from whom we determine it necessary to obtain audit evidence.

Your responsibilities include adjusting the financial statements to correct material misstatements and for confirming to us in the representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the organization involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the Organization received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the Organization complies with applicable laws, regulations, contracts, agreements, and grants and for taking timely and appropriate steps to remedy fraud, noncompliance with provisions of laws, regulations, contracts or grant agreements, or abuse that we report.

You are responsible for the preparation of the supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. The Organization is also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

You agree to assume all management responsibilities relating to the financial statements, related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter the tax services provided and our assistance with the preparation of the financial statements and related notes and that you have evaluated the adequacy of our services and have reviewed and approved the results of the services, the financial statements, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to assume all management responsibilities for the financial statement preparation services and any other nonattest services we provide; you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of the services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all cash, accounts receivable, and other confirmations we request and will locate any documents selected by us for testing.

We will provide copies of our reports to the Organization; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Moss, Levy & Hartzheim LLP and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the State of California or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Moss, Levy & Hartzheim LLP personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the State of California. If we are aware that a federal awarding agency or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Alexander C. Hom is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them. We expect to begin our audit on approximately July 1, 2024 and to complete your information returns and issue our report no later than December 15, 2024.

Our fee for these services will be at our standard hourly rates plus out-of-pocket costs (such as report reproduction, word processing, postage, travel, copies, telephone, etc.) except that we agree that our gross fee, including expenses, will not exceed \$5,900. Our standard hourly rates vary according to the degree of responsibility involved and the experience level of the personnel assigned to your audit. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 30 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

We appreciate the opportunity to be of service to Big Sur Charter School and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

Moss, Levy & Hartzheim LLP

Moss, Levy & Hartzheim LLP

RESPONSE:

This letter correctly sets forth the understanding of Big Sur Charter School.

Management signature: _____

Title: _____

Date: _____

Governance signature: _____

Title: _____

Date: _____

Big Sur Charter School's Administration of Medications, Anti-Seizure Medication, Emergencies, Opioid Antagonist Administration, Head Lice and Administration of Medicinal Cannabis Policy

I. Administration of Medications

The following policy regarding the administration of medications is applicable when the staff of Big Sur Charter School (the "School") is responsible for the administration of, or assisting in the administration of, medication to students attending school during regular school hours, including before- or after-school programs, field trips, extracurricular and co-curricular activities, and camps or other activities that typically involve at least one overnight stay away from home, because administration of the medication is absolutely necessary during school hours and the student cannot self-administer or another family member cannot administer the medication at school.

Requirements for Administration or Assistance: Before the School will allow a student to carry and self-administer prescription auto-injectable epinephrine, or inhaled asthma medication, or have authorized School personnel administer medications or otherwise assist a student in administering his or her medication, the School must receive a copy of the following:

- A written statement executed by the student's authorized health care provider specifying the medication the student is to take, the dosage, and the period of time during which the medication is to be taken and a statement that the medication must be taken during regular school hours, as well as detailing the method, amount and time schedule by which the medication is to be taken;
- A written statement by the student's parent or guardian initiating a request to have the medication administered to the student or to have the student otherwise assisted in the administration of the medication, in accordance with the authorized health care provider's written statement. The written statement shall also provide express permission for the School to communicate directly with the authorized health care provider, as may be necessary, regarding the authorized health care provider's written statement.
- In the cases of self-administration of asthma medication or prescription auto-injectable epinephrine, the School must also receive a confirmation from the authorized health care provider that the student is able to self-administer the medication and a written statement from the parent/guardian consenting to the student's self-administration and releasing the School and its personnel from civil liability if the self-administering student suffers an adverse reaction by self-administering his/her medication.

New statements by the parent/guardian and the authorized health care provider shall be required annually and whenever there is a change in the student's authorized health care provider, or a change in the medication, dosage, method by which the medication is required to be taken or date(s), or time(s) the medication is required to be taken. If there is not a current written statement by the student's parent or guardian and authorized health care provider, the School may not administer or assist in administration of medication. The School will provide each parent with a reminder at the beginning of each school year that they are required to provide the proper written statements.

Parent(s)/guardian(s) of students requiring administration of medication or assistance with administration of medication shall personally deliver (or, if age appropriate, have the student deliver) the medication for administration to the School Director.

Big Sur Charter School's Administration of Medications, Anti-Seizure Medication, Emergencies, Opioid Antagonist Administration, Head Lice and Administration of Medicinal Cannabis Policy

Responses to the Parent/Guardian upon Request: The School shall provide a response to the parent/guardian within 10 business days of receiving the request for administration and the physician statement regarding which School employees, if any, will administer medication to the student, and what the employees of the School will do to administer the medication to the student or otherwise assist the student in the administration of the medication.

Termination of Consent: Parent(s)/guardian(s) of students who have previously provided consent for the School to administer medication or assist a student with the administration of medication may terminate consent by providing the School with a signed written withdrawal of consent on a form obtained from the office of the School Director.

Authorized Personnel: [Note: The California Regulations limit who may administer medication to students. It may be administered by a nurse who is employed by the School and who is credentialed pursuant to Education Code section 44877. Otherwise, the school employee designated for such administration must consent to administer or assist the student in administering the medication and must be legally able administer the medication to the student or otherwise assist the student in administering the medication. The regulations do not provide any guidance regarding who may legally administer the medication. This policy is drafted consistent with these requirements, although arguably not binding on charter schools.] A nurse who is employed by the School and certified in accordance with Education Code section 44877 will administer or assist in administering the medication to students. If not available, a designated School employee who is legally able to and has consented to administer or assist in administering the medication to students will administer the medication or otherwise assist the students.

Storage of Medication: [Note: Schools should develop policies for storage of medication in a manner that is secure and maintains the medication's effectiveness. Since each school's physical layout and personnel vary, this policy is written very broadly. Modify it as necessary to suit your school's individual needs.] Medication for administration to students shall be maintained in the office of the School nurse in a locked cabinet. It shall be clearly marked for easy identification. If the medication requires refrigeration, the medication shall be stored in a refrigerator in a locked office, which may only be accessed by the School nurse and other authorized personnel. If stored medication is unused, discontinued or outdated, the medication shall be returned to the student's parent/guardian where possible. If not possible, the School shall dispose of the medication by the end of the school year in accordance with applicable law.

Confidentiality: School personnel with knowledge of the medical needs of students shall maintain the students' confidentiality. Any discussions with parents/guardians and/or authorized health care providers shall take place in an area that ensures student confidentiality. All medication records or other documentation relating to a student's medication needs shall be maintained in a location where access is restricted to the School Director, the School nurse or other designated School employees.

Medication Record: The School shall maintain a medication record for each student that is allowed to carry and self-administer medication and for each student to whom medication is administered or other assistance is provided in the administration of medication.

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The medication record shall contain the following: 1) The authorized health care provider's written statement; 2) The written statement of the parent/guardian; 3) A medication log (see below); 4) Any other written documentation related to the administration of the medication to the student or otherwise assisting the pupil in the administration of the medication.

The medication log shall contain the following information: 1) Student's name; 2) Name of the medication the student is required to take; 3) Dose of medication; 4) Method by which the pupil is required to take the medication; 5) Time the medication is to be taken during the regular school day; 6) Date(s) on which the student is required to take the medication; 7) Authorized health care provider's name and contact information; and 8) A space for daily recording of medication administration to the student or otherwise assisting the student, such as date, time, amount, and signature of the individual administering the medication or otherwise assisting in administration of the medication.

Deviation from Authorized Health Care Provider's Written Statement: If a material or significant deviation from the authorized health care provider's written statement is discovered, notification as quickly as possible shall be made as follows: 1) If discovery is made by a licensed health care professional, notification of the deviation shall be in accordance with applicable standards of professional practice; 2) If discovery is made by an individual other than a licensed health care professional, notification shall be given to the School Director, the student's parent/guardian, any School employees that are licensed health care professionals and the student's authorized health care provider.

Specialized Physical Health Care Services for Individuals with Exceptional Needs:

Authorized Personnel: The following individuals may assist students with exceptional needs who require specialized physical health care services during the regular school day:

- Qualified persons who possess an appropriate credential issued pursuant to Education Code sections 44267 or 44267.5
- Qualified designated school personnel trained in the administration of specialized physical health care if they perform those services under the supervision, pursuant to 5 C.C.R. § 3051.12, of a credentialed school nurse, public health nurse or licensed physician and surgeon and the services are determined by the credentialed school nurse or licensed physician and surgeon, in consultation with the physician treating the pupil, to include all of the following:
 - Routine for the pupil;
 - Pose little potential for harm for the pupil;
 - Performed with predictable outcomes, as defined in the Individualized Education Program of the pupil;
 - Does not require a nursing assessment, interpretation, or decision making by the designated school personnel
- Persons providing specialized physical health care services for students with exceptional needs shall demonstrate competence in basic cardiopulmonary resuscitation and shall be knowledgeable of the emergency medical resources available in the community in which the services are performed.

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Specialized health care or other services for students with exceptional needs that require medically related training shall be provided pursuant to the procedures identified in this policy generally. Specialized physical health care services include catheterization, gastric tube feeding, suctioning or other services that require medically related training.

II. Administration of Emergency Anti-Seizure Medication

A. Definitions

"Authorizing physician and surgeon," as used in this policy, may include, but is not limited to, a physician and surgeon employed by, or contracted with, a local educational agency, a medical director of the local health department, or a local emergency medical services director.

"Seizure Action Plan" means a written, individualized health plan designated to acknowledge and prepare for the health care needs of a student diagnosed with seizures, a seizure disorder, or epilepsy.

"Volunteer" means an employee who (1) has volunteered to administer emergency anti-seizure medication to a student diagnosed with seizures, a seizure disorder, or epilepsy if the student is suffering from a seizure, (2) has been designated by the Charter School; and (3) has received training in accordance with the Education Code.

B. Administration of Emergency Medical Assistance

If a student diagnosed with seizures, a seizure disorder, or epilepsy has been prescribed an emergency anti-seizure medication by the student's health care provider, the Charter School, upon receipt from the student's parent or guardian, may designate one or more volunteers as the student's school to receive initial and annual refresher training, based on prescribed standards, regarding the emergency use of anti-seizure medication from the school nurse or other qualified person designated by an authorizing physician and surgeon.

A school nurse, or if the school does not have a school nurse or the nurse is not onsite or available, a properly trained volunteer may administer emergency anti-seizure medication in accordance with the Education Code to a student diagnosed with seizures, a seizure disorder, or epilepsy if the student is suffering from a seizure.

The volunteer training shall be in line with the minimum standards of training established by the Superintendent of Public Instruction and shall include all of the following:

- Recognition of the signs and symptoms of seizures and the appropriate steps to be taken to respond to those symptoms;
- Administration, or assisting with the self-administration of, an emergency anti-seizure medication, or a medication or therapy prescribed to treat the symptoms of seizures, seizure disorders, or epilepsy, including manual vagus nerve stimulation, approved by the United States Food and Drug Administration, or any successor agency;
- Basic emergency follow up procedures;
- Written materials covering the information required by statute.

An employee who volunteers may rescind their offer to administer emergency anti-seizure medication at any time, including after receipt of training.

Upon receipt of a parent or guardian's request for assistance with administration of anti-seizure medication, the Charter School will distribute a notice to all staff at least once, but no more than two times per school year, with the following information:

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- A description of the volunteer request stating that the request is for volunteers to be trained to recognize and respond to seizures, including training to administer emergency anti-seizure medication to a student diagnosed with seizures, a seizure disorder, or epilepsy if the student is suffering from a seizure.
- A description of the training that the volunteer will receive.
- The right of an employee to rescind their offer to volunteer.
- A statement that there will be no retaliation against any individual for rescinding the individual's offer to volunteer, including after training.

Upon receipt of a parent or guardian's request for assistance with administration of anti-seizure medication, the Charter School shall notify the parent or guardian that the student may qualify for services or accommodations pursuant to 29 U.S. C. section 794 (Section 504) and the federal Individuals with Disabilities Act (IDEA), and that the parent or guardian understands that it is the parent or guardian's right to request a 504 plan or an individualized education program at any time.

If there are no volunteers at the student's school, the Charter School shall notify the parent or guardian of the student's right to be assessed for services and accommodations guaranteed under Section 504 and the IDEA.

Seizure Action Plan: Before administering emergency anti-seizure medication or therapy, the Charter School shall obtain from the student's parent or guardian a seizure action plan that includes all of the following:

- Authorization, in writing, for the medication to be administered to the student at school;
- Authorization shall be renewed each school year, unless needed sooner;
- A copy of a statement, in writing from the student's health care provider that includes the following: 1) student's name; 2) the name and purpose of the medication; 3) the prescribed dosage; 4) the method of administration; 5) the frequency with which the medication may be administered; 6) detailed seizure symptoms, including frequency, type, or length of seizures that identify when the administration of an emergency anti-seizure medication becomes necessary; 7) the circumstances under which the medication may be administered; 8) any potential adverse responses by the student and recommended mitigation actions, including when to call emergency services, including the emergency 911 telephone number; 9) a protocol for observing the student after a seizure, including, but not limited to, whether the student should rest in the school office, whether the student may return to class, and the length of time the student should be under direct observation;
- How and where the emergency anti-seizure medication will be stored at the school;
- A signed notice verifying that the parent or guardian was given the information about Section 504 and the IDEA and that the parent or guardian understands that it is the right to request a plan under Section 504 or an IEP at any time;
- A signed notice verifying that a student's seizure may be responded to, including with the administration of emergency anti-seizure medication prescribed to the student, by a nonmedical professional who has received appropriate training.

If the Charter School obtains written consent, the seizure action plan shall be distributed to any school personnel or volunteers responsible for the supervision or care of that student.

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The Charter School shall notify the nurse, or the charter school administrator (or designee) if there is no nurse, if an employee at the school administers an anti-seizure medication to a student. The notice shall be kept on file in the nurse's office or the school administrator's office.

III. Emergencies

A. First Aid and CPR

All teachers are certified in first aid and CPR and are recertified every year in either first aid or CPR. Every classroom has a First Aid Kit containing appropriate supplies. First aid will be administered whenever necessary by trained staff members. When necessary, the appropriate emergency personnel will be called to assist.

B. Resuscitation Orders

School employees are trained and expected to respond to emergency situations without discrimination. If any student needs resuscitation, trained staff shall make every effort to resuscitate him/her. The School does not accept or follow any parental or medical "do not resuscitate" orders. School staff should not be placed in the position of determining whether such orders should be followed. The School Director, or his/her designee, shall ensure that all parents/guardians are informed of this policy.

C. Emergency Contact Information

For the protection of a student's health and welfare, the School shall require the parent/guardian(s) of all students to keep current with the School emergency information including the home address and telephone number, business address and telephone number of the parent/guardian(s), and the name, address and telephone number of a relative or friend who is authorized to care for the student in any emergency situation if the parent/guardian cannot be reached.

D. Emergency Aid to Students with Anaphylactic Reaction

The School will provide emergency epinephrine auto-injectors to trained School personnel and those trained personnel may use those epinephrine auto-injectors to provide emergency medical aid to persons suffering from an anaphylactic reaction. The training provided to School personnel shall be in compliance with the requirements of Education Code section 49414 and any regulations promulgated in line therewith.

Trained School personnel may immediately administer an epinephrine auto-injector to a person suffering, or reasonably believed to be suffering, from an anaphylaxis reaction at School or a School related activity when a physician is not immediately available.

For purposes of this policy, "anaphylaxis" means a potentially life-threatening hypersensitivity to a substance. Symptoms of anaphylaxis may include shortness of breath, wheezing, difficulty breathing, difficulty talking or swallowing, hives, itching, swelling, shock or asthma. Causes of anaphylaxis may include, but are not limited to, an insect sting, food allergy, drug reaction and exercise.

IV. Opioid Antagonist Administration

The School will provide emergency hydrochloride or another opioid antagonist ("Opioid Antagonist") to trained School personnel and those trained personnel may use the Opioid Antagonist to provide emergency medical aid to persons suffering, or reasonably believed to be suffering, from an opioid overdose. The training provided to School personnel shall be in compliance with the requirements of Education Code section 49414.3 and any regulations promulgated in line therewith.

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Trained School personnel may administer the Opioid Antagonist to a person exhibiting potentially life-threatening symptoms of an opioid overdose at school or a school activity when a physician is not immediately available. If the Opioid Antagonist is used, it shall be restocked as soon as reasonably possible, but no later than two weeks after it is used. The School's supply of Opioid Antagonist shall be restocked before its expiration date.

If School personnel administers an Opioid Antagonist to a student, the School will call emergency services (9-1-1) and will contact the student's parent/guardian.

V. Head Lice

To prevent the spread of head lice infestations, School personnel shall report all suspected cases of head lice to the School nurse, or designee, as soon as possible. The nurse, or designee, shall examine the student and any siblings of affected students or members of the same household in accordance with the School's health examination policy. If nits or lice are found, the student(s) shall be excluded from attendance and parents/guardians informed about recommended treatment procedures and sources of further information.

In the event of one or more persons infested with lice, an exposure notice with information about head lice shall be sent home to all parents/guardians of the students that have been exposed to the head lice.

School personnel shall maintain the privacy of students identified as having head lice and excluded from attendance.

Excluded students may return to School when reexamination by the nurse, a designee, or other authorized health care representative shows that all nits and lice have been removed. After returning, the student may be reexamined by the nurse as appropriate to ensure that re-infestation has not occurred.

VI. Administration of Medicinal Cannabis

It is the policy of the School to allow a parent or guardian of a student to possess and administer to a student who is a qualified patient pursuant to Health and Safety Code section 11362.7, *et seq.*, medicinal cannabis at the school site, subject to the following requirements.

No School staff is required to administer medicinal cannabis to a student.

The parent/guardian shall not administer the medicinal cannabis in a manner that disrupts the educational environment or exposes other pupils to medicinal cannabis. It is in the sole discretion of the School as to what disrupts the educational environment.

After the parent/guardian administers the medicinal cannabis, the parent/guardian shall remove any remaining medicinal cannabis from the school site.

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Before administering the medicinal cannabis, the parent/guardian shall provide to an employee of the school a valid written medical recommendation for medicinal cannabis for the student to be kept on file at the school.

For purposes of confidentiality and disclosure, student records collected in accordance with this policy shall be treated as medical records and shall be subject to all provisions of state and federal law that govern the confidentiality and disclosure of medical records.

This policy may be amended or rescinded at a regularly scheduled board meeting for any reason, including but not limited to, if the School is at risk of, or has lost, federal funding as a result of the policy. The policy may be amended or rescinded at a special meeting if both of the following are met: 1) Exigent circumstances necessitate an immediate change to the policy; and 2) At the meeting the governing board will address the intent to amend or rescind the policy.

For purposes of this policy, cannabis means all parts of the plant *Cannabis sativa* L., whether growing or not; the seeds thereof; the resin extracted from any part of the plant; and every compound, manufacture, salt, derivative, mixture, or preparation of the plant, its seeds or resin. Cannabis products means cannabis that has undergone a process whereby the plant material has been transformed into a concentrate, including, but not limited to, concentrated cannabis, or an edible or topical product containing cannabis or concentrated cannabis and other ingredients. Medicinal cannabis excludes medicinal cannabis or cannabis products in a smokeable or vapeable form.

Big Sur Charter School's Bullying and Cyberbullying Prevention Procedures

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

Cyberbullying Prevention Procedures:

BSCS advises students:

- a. To never share passwords, personal data, or private photos online.
- b. To think about what they are doing carefully before posting and by emphasizing that comments cannot be retracted once they are posted.
- c. That personal information revealed on social media can be shared with anyone including parents, teachers, administrators, and potential employers. Students should never reveal information that would make them uncomfortable if the world had access to it.
- d. To consider how it would feel receiving such comments before making comments about others online.

Student are also advised to avoid websites offering:

- a. free registration and ease of registration,
- b. peer-to-peer instant messaging,
- c. comment forums or sections,
- d. internet websites offering image or video posting platforms.

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

For more information Bullying Prevention Training & Resources please visit the CDE's website: <https://www.cde.ca.gov/ls/ss/se/bullyres.asp>

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

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

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

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

Big Sur Charter School's Bullying and Cyberbullying Prevention Procedures

Professional Development: BSCS annually makes available the online training module developed by the California Department of Education pursuant Education Code section 32283.5(a) to its certificated employees and all other BSCS employees who have regular interaction with students. BSCS informs certificated employees about the common signs that a student is a target of bullying including:

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

Charter School also informs certificated employees about the groups of students determined by BSCS, and available research, to be at elevated risk for bullying. These groups include but are not limited to:

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

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

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

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

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

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

Big Sur Charter School's Bullying and Cyberbullying Prevention Procedures

Any student who believes they have been subject to misconduct prohibited by this Policy or has witnessed such prohibited misconduct is encouraged to immediately report such misconduct to the Coordinator:

Aimee Alling, School Director
304 Foam Street, Monterey, CA 93940
director@bigsurcharterschool.org
831-324-4573

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

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

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

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

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

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

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

Big Sur Charter School's Bullying and Cyberbullying Prevention Procedures

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

Investigation and Response: Upon receipt of a report of misconduct prohibited by this Policy from a student, staff member, parent, volunteer, visitor or affiliate of BSCS, the Coordinator (or administrative designee) will promptly initiate an investigation. In most cases, a thorough investigation will take no more than twenty-five (25) school days. If the Coordinator (or administrative designee) determines that an investigation will take longer than twenty-five (25) school days and needs to be delayed or extended due to good cause, the Coordinator (or administrative designee) will inform the complainant of the reasons for the delay or extension and provide an approximate date when the investigation will be complete.

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

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

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

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- BSCS may remove a respondent from BSCS's education program or activity on an emergency basis, in accordance with BSCS's policies, provided that BSCS undertakes an individualized safety and risk analysis, determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal, and provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.
- This provision may not be construed to modify any rights under the IDEA, Section 504, or the ADA.
- Informal Resolution
 - If a formal complaint of sexual harassment is filed, BSCS may offer a voluntary informal resolution process, such as mediation, to the parties at any time prior to reaching a determination regarding responsibility. If BSCS offers such a process, it will do the following:
 - Provide the parties with advance written notice of:
 - The allegations;
 - The requirements of the voluntary informal resolution process including the circumstances under which the parties are precluded from resuming a formal complaint of sexual harassment arising from the same allegations;
 - The parties' right to withdraw from the voluntary informal resolution process and resume the grievance process at any time prior to agreeing to a resolution; and
 - Any consequences resulting from participating in the voluntary informal resolution process, including the records that will be maintained or could be shared; and
 - Obtain the parties' advance voluntary, written consent to the informal resolution process.
 - BSCS will not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.
- Investigation Process
 - The decision-maker will not be the same person(s) as the Coordinator or the investigator. BSCS shall ensure that all decision-makers and investigators do not have a conflict of interest or bias for or against complainants or respondents.
 - In most cases, a thorough investigation will take no more than twenty-five (25) school days. If the investigator determines that an investigation will take longer than twenty-five (25) school days and needs to be delayed or extended due to good cause, the investigator will inform the complainant and any respondents in writing of the reasons for the delay or extension and provide an approximate date when the investigation will be complete.
 - The parties will be provided with an equal opportunity to present witnesses, to inspect and review any evidence obtained that is directly related to the allegations raised, and to have an advisor present during any investigative meeting or interview.
 - The parties will not be prohibited from discussing the allegations under investigation or to gather and present relevant evidence.
 - A party whose participation is invited or expected at an investigative meeting or interview will receive written notice of the date, time, location, participants, and purpose of the meeting or interview with sufficient time for the party to prepare to participate.

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- Prior to completion of the investigative report, BSCS will send to each party and the party's advisor, if any, a copy of the evidence subject to inspection and review, and the parties will have at least ten (10) days to submit a written response for the investigator's consideration prior to the completion of the investigation report.
- The investigator will complete an investigation report that fairly summarizes all relevant evidence and send a copy of the report to each party and the party's advisor, if any, at least ten (10) days prior to the determination of responsibility.
- Dismissal of a Formal Complaint of Sexual Harassment
 - If the investigation reveals that the alleged harassment did not occur in BSCS's educational program in the United States or would not constitute sexual harassment even if proved, the formal complaint with regard to that conduct must be dismissed. However, such a dismissal does not preclude action under another applicable BSCS policy.
 - BSCS may dismiss a formal complaint of sexual harassment if:
 - The complainant provides a written withdrawal of the complaint to the Coordinator;
 - The respondent is no longer employed or enrolled at BSCS; or
 - The specific circumstances prevent BSCS from gathering evidence sufficient to reach a decision on the formal complaint or the allegations therein.
 - If a formal complaint of sexual harassment or any of the claims therein are dismissed, BSCS will promptly send written notice of the dismissal and the reason(s) for the dismissal simultaneously to the parties.
- Determination of Responsibility
 - The standard of evidence used to determine responsibility is the preponderance of the evidence standard.
 - Determinations will be based on an objective evaluation of all relevant evidence and credibility determinations will not be based on a person's status as a complainant, respondent, or witness.
 - BSCS will send a written decision on the formal complaint to the complainant and respondent simultaneously that describes:
 - The allegations in the formal complaint of sexual harassment;
 - All procedural steps taken including any notifications to the parties, interviews with parties and witnesses, site visits, and methods used to gather other evidence;
 - The findings of facts supporting the determination;
 - The conclusions about the application of BSCS's code of conduct to the facts;
 - The decision and rationale for each allegation;
 - Any disciplinary sanctions the recipient imposes on the respondent, and whether remedies designed to restore or preserve equal access to the education program or activity will be provided to the complainant; and
 - The procedures and permissible bases for appeals.

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

Big Sur Charter School's Bullying and Cyberbullying Prevention Procedures

Right of Appeal: Should the reporting individual find BSCS's resolution unsatisfactory, the reporting individual may, within five (5) business days of notice of BSCS's decision or resolution, submit a written appeal to the President of the BSCS Board, who will review the investigation and render a final decision.

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

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

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

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

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

Big Sur Charter School's Conflicts of Interest Policy Pursuant to the Political Reform Act of 1974 (Government Code §§ 87100, et seq.) and Government Code section 1090

This policy is drafted in compliance with Government Code section 1090, the Political Reform Act (PRA) and the Corporations Code, all of which apply to charter schools beginning January 1, 2020.

Most charter schools are operated as or by nonprofit corporations. The California Corporations Code prescribes conflicts of interest rules for nonprofit corporations. Thus, this policy is drafted so that it is also compliant with the Corporations Code.

When drafting your conflict of interest policy under the PRA, it must do the following: 1) Provide reasonable assurance that all foreseeable potential conflict of interest situations will be disclosed or prevented; 2) Provide each affected person a clear and specific statement of his/her duties under the PRA; and 3) Adequately differentiate between designated employees with different powers and responsibilities. Govt. Code § 87309. This model policy is drafted to meet these requirements.

In addition, this policy is drafted to reflect the restrictions imposed by Government Code section 1090, which is the most restrictive of conflict codes in California.

Under Title 5, Section 11963.2 ("SB740 regulations"), a nonclassroom based charter school is REQUIRED to certify to the State Board of Education that it has adopted and implemented conflict of interest policies as a condition to filing a request for a funding determination.

I. Adoption

The Governing Board hereby adopts this Conflict of Interest Policy ("Policy"), which shall apply to all governing board members, candidates for member of the board, and all other designated employees of the Big Sur Charter School ("School").

II. Definitions

"Designated Persons" are officers and employees of the School and Board members who hold positions that involve the making or participation in the making of decisions that may foreseeably have a material effect on any financial interest of that individual. The designated positions are listed in Appendix "A" attached to the School's Conflict of Interest Code and incorporated herein by reference.

"Remote Interests in a Contract" are those interests identified in Government Code section 1091 and relate only to voting members on the Board of Directors and are referred to as "disqualifying interests" herein.

"Non-Interests in a Contract" are those interests identified in Government Code section 1091.5 and relate to directors, officers or employees of the School and are referred to as "disqualifying interests" herein. A copy of Government Code sections 1091 and 1091.5 are attached as Exhibit A to this policy.

Adopted:
Revision Date:

Big Sur Charter School's Conflicts of Interest Policy Pursuant to the Political Reform Act of 1974 (Government Code §§ 87100, et seq.) and Government Code section 1090

III. Disclosure Statements

A. Statement of Economic Interest, Form 700

Each designated employee, including governing board members and candidates, shall file a Statement of Economic Interest, Form 700 ("Statement") at the time and manner prescribed below, disclosing reportable investments, interests in real property, business positions, and income required to be reported under the category or categories to which the Designated Person's position is assigned in Appendix A of the School's Conflict of Interest Code.

An investment, interest in real property or income shall be reportable if the business entity in which the investment is held, the interest in real property, the business position, or source of income may foreseeably be affected materially by a decision made or by participation in the decision by the designated employee by virtue of his or her position. The specific disclosure responsibilities assigned to each position are set forth in Appendix B of the School's Conflict of Interest Code.

Contents of Statements

Initial Statements: Initial Statements shall disclose any reportable investments, interests in business positions and real property held on the date of assuming office, and income received during the twelve (12) months prior to the effective date of the Code.

Assuming Office Statements: Assuming Office Statements shall disclose any reportable investments, interests in business positions and real property held on the date of assuming office, and income received during the 12 months before the date of assuming office or the date of being appointed or nominated.

Annual Statements: Annual Statements shall disclose reportable investments, interests in real property, and income and business positions held or received during the previous calendar year or since the date the designated employee took office if during the calendar year.

Leaving Office Statement: Leaving Office Statements shall disclose reportable investments, interests in real property, business positions held and income received at any time during the period between the closing date of the last statement required to be filed and the date of leaving office.

Timing of Filings

An initial Statement shall be filed by each designated person within 30 days after the effective date of the Code. Thereafter, each new Designated Person shall file a Statement within 30 days after assuming office. Each Designated Person shall file an

Big Sur Charter School's Conflicts of Interest Policy Pursuant to the Political Reform Act of 1974 (Government Code §§ 87100, et seq.) and Government Code section 1090

annual Statement by April 1. Every Designated Person who leaves office shall file a Statement within 30 days of leaving office.

Statements Filed With the Charter School

All Statements shall be supplied by the Charter School on forms prescribed by the Fair Political Practices Commission. All Statements shall be filed with the Charter School. The Charter School's filing officer shall make and retain a copy and forward the original to the Charter School's code reviewing body.

B. Common Director Disclosure Statement

At the commencement of an individual's term with the Charter School and at the beginning of each fiscal year, each Board member shall complete a Common Director Disclosure Statement and provide it to the Charter School identifying all organizations for which he/she is a board member, employee or committee member that are not otherwise disclosed in the Statement of Economic Interest. **[Note: This provision is not required by law, but provides an additional level of review for the Board to ensure that there are no conflicts of interest.]**

IV. Disqualification

Designated Persons: No Designated Person, or their spouses and dependent children, may be financially interested in any contract made by them in their official capacity. Board Members are presumed to have made contracts in which they, or their spouses and dependent children have a financial interest. A Designated Person may not make, participate in making, or in any way use or attempt to use his/her official position to influence any Charter School decision which he/she knows or has reason to know he or she has a disqualifying financial interest. A Designated Person has a "disqualifying financial interest" if the decision will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the Designated Person or a member of his or her immediate family. A Director that is also an employee of the School must follow the recusal provisions outlined below for any matters uniquely affecting that member's employment. A Designated Person must follow recusal provisions outlined below with respect to Remote Interests in Contracts and Non-Interests in Contracts.

[Note: Making decisions includes the following actions: 1) Authorizing or directing any action; 2) Voting; 3) Appointing a person; 4) Obligating or committing his/her agency to any course of action; 5) Entering into any contractual agreement on behalf of the agency.] [Note: Participating in making a decision includes the following actions, unless there is significant intervening substantive review: Providing information, an opinion or recommendation for the purpose of affecting the decision.] [Note: An official is

Big Sur Charter School's Conflict of Interest Code Pursuant to California Corporation Code

This Policy Tool Kit contains three conflicts of interest codes. Board Policy #7A is drafted in compliance with the Corporations Code applicable to all California nonprofit corporations. Board Policy #7B is drafted in compliance with both the Political Reform Act ("PRA") in the Government Code and the Corporations Code applicable to nonprofit corporations. Board Policy #7C is drafted in compliance with Government Code section 1090, the PRA and the Corporations Code.

Under the California Corporations Code, all directors of nonprofit corporations owe a duty of loyalty to the nonprofit for which they work or volunteer. This duty requires all directors to act in good faith and in the best interest of the nonprofit when acting on nonprofit matters. Thus, a conflict of interest occurs when a director acts on a nonprofit matter that could benefit or harm him/her personally and/or an immediate family member. Accordingly, the Corporations Code outlines the types of self-interested transactions that a nonprofit corporation may enter into and the processes by which the boards must follow. Therefore, each charter school organized as a nonprofit corporation should adopt a conflicts of interest code that complies with the Corporations Code. The following conflict of interest policy is drafted based upon the restrictions found in the Corporations Code applicable to nonprofit public benefit corporations. This policy may be modified to meet the requirements of for-profit Corporations and unincorporated associations as necessary.

There are other conflict of interest laws of which charter schools should be aware. For instance, the PRA (Government Code §§ 87100, et seq.), applies to local government agencies. The Fair Political Practices Commission (FPPC), the entity charged with enforcing the PRA, has opined that this definition specifically applies to charter schools. While these opinions do not constitute legal precedent, the issue has not been determined by the courts or clarified by the legislature. Thus, the PRA's application to charter schools remains unsettled. In any event, some charter schools may have agreed to adhere to the requirements of PRA in their memorandums of understanding with the chartering agency. Policy 7B in this binder is designed to address the PRA for those schools that either believe the PRA applies to them and/or have voluntarily agreed to comply with it.

Additionally, Government Code section 1090 applies to, among others, officers and employees of the "state, county, district." **On its face, this language does not appear to include charter schools. The state Attorney General, the entity charged with enforcing this section, has not opined that this section applies to charter schools. The issue has not been litigated in the courts, and the legislature has not amended the statute to include charter schools. Nonetheless, in several published audits of different charter schools in California, the Fiscal Crisis Management Assistance Team (FCMAT) used section 1090 as the basis for its audit findings raising the specter of further application to charter schools. CSDC does not believe that a credible argument can be made that section 1090 applies to charter schools, but offers policies relating to this law since many charter schools are required by their charter granting agencies to comply with section 1090.**

Additionally, under Title 5, section 11963.3(b)(1)(C), a "non classroom-based" charter school is REQUIRED to certify to the State Board of Education that it has adopted and implemented conflict of interest policies as a condition to filing a request for a funding determination. Title 5, however, does not identify a specific conflict of interest policy that the charter school should adopt. CSDC believes that either Policy 7 A or B, if properly implemented, would meet the requirements of section 11963.3 as it is currently written.

Adoption

The Board of Directors of Charter School ("Board") hereby adopts this Conflict of Interest Code (the "Code"), which shall apply to all governing board members, candidates for members of the board and all other designated employees of the Charter School.

Adopted:
Revision Date:

Big Sur Charter School's Conflict of Interest Code Pursuant to California Corporation Code

Designated Employees and Common Directors

"Designated Employees" are those directors, officers and/or employees of Charter School with significant powers delegated to them by the Board, who have a direct or indirect material Financial Interest in a contract or transaction presented for authorization, approval or ratification to the Board, or a committee thereof.

"Common Directors" are those Directors that sit on the Board of Directors and the board of directors of another corporation with which Charter School is considering entering a contract or transaction.

"Financial Interests" are when directors, officers and/or employees, or their family members, are compensated by the School for services rendered to it within the previous 12 months, whether as a full- or part-time employee, independent contractor or otherwise, excluding any reasonable compensation paid to a director as director. A director, officer and/or employee also has a Financial Interest if the person has, directly or indirectly, through business, investment or family: 1) an ownership or investment interest in any entity with which the organization has a transaction or arrangement; 2) a compensation agreement with any entity or individual with which the School has a transaction or arrangement; or 3) a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the School is negotiating a transaction or arrangement.

Designated Employee Disclosure

Any Designated Employee shall make a good faith, full disclosure of the material facts relating to the transaction and that person's material financial interest in the transaction prior to the acceptance of the potential contract or transaction. The disclosure must be reflected in the minutes of the meeting of the Board of Directors or a Committee thereof. Such disclosure shall include any known material facts concerning the transaction and the designated employee's interest in the transaction.

Designated Employee Transactions/Contracts

Board Vote

Once the Board has knowledge of the material facts as disclosed by the Designated Employee, the Board may authorize the contract or transaction in good faith by a majority vote sufficient for that purpose, without counting the votes of the Designated Employee(s). (The Designated Employees may be counted in determining whether a quorum is present.)

The following must be confirmed in the affirmative prior to the Board's acceptance of a contract or transaction with a Designated Employee:

- That the transaction is entered into for the benefit of the Charter School;
- That the transaction was fair and reasonable for the Charter School at the time it enters into the transaction;
- That after reasonable investigation under the circumstances, the Board determines, in good faith, that the Charter School could not have obtained a more advantageous arrangement with reasonable effort. Documentation of the results of the investigation shall be retained either in the Board minutes and/or in the school's financial files.

Big Sur Charter School's Conflict of Interest Code Pursuant to California Corporation Code

Committee Vote

A Committee may approve a transaction or contract involving a Designated Employee if, in addition to findings listed above for a Board Vote, it was not reasonably practicable to obtain full Board approval prior to entering into the transaction or contract and the Committee was authorized in the first instance to approve such a transaction or contract. Additionally, the full Board must ratify the transaction or contract at its next board meeting by a majority vote of the Directors then in office without counting the vote of the Designated Employee(s).

Common Director Disclosure

Any Common Director shall make a good faith disclosure regarding that Director's other directorship prior to the acceptance or ratification of the potential contract or transaction involving the Director's other directorship. The disclosure must be reflected in the minutes of the meeting of the Board of Directors or a Committee thereof. Such disclosure shall include the material facts as to the transaction and as to such director's other directorship.

Director Transactions/Contracts

Board Vote

Once the Board has knowledge of the material facts as disclosed by the Common Director, the Board may authorize the contract or transaction in good faith by a majority vote sufficient for that purpose, without counting the votes of the Common Director.

No contract or transaction is void or voidable because the Common Director participated in the Board meeting if the required disclosure is made and vote is satisfied; or alternatively, if there is a finding that the contract or transaction was just and reasonable at the time it was authorized.

Committee Vote

A Committee may approve a transaction or contract involving a Common Director by following the procedures listed for the Board above, as long as that Committee was authorized to approve the transaction or contract.

Disclosure Statement [This provision is optional][1]

At the commencement of an individual's term with the Charter School and at the beginning of each fiscal year, each board member and officer shall complete a Conflict of Interest Disclosure Statement, in the form of the document attached hereto, for review by the Board.

Interested Directors

Interested Directors: Not more than 49 percent of the persons serving on the Board of the Charter School may have a Financial Interest.

Non-Application of Policy

This policy does not preclude a Director from serving the Charter School in any other capacity, such as an officer, agent, employee, independent contractor, or otherwise, and receiving compensation for those services, so long as the employment is disclosed and the employment or other financial relationship is approved by the Board, without the interested Director participating in the vote.

Big Sur Charter School's Conflict of Interest Code Pursuant to California Corporation Code

This policy does not apply to transactions that are part of a public or charitable program of the Charter School if the Charter School approves the transaction in good faith and without unjustified favoritism and results in a benefit to one or more directors or their families because they are in the class of persons intended to be benefited by the public or charitable program.

Conflict of Interest Disclosure Statement

This Conflict of Interest Disclosure Statement is intended to help the charter school's officers and members of the Board of Directors ensure that they are not compromising their ability to act in the charter school's best interest by placing themselves in a position of an actual or potential conflict of interest. Please initial following Item A or Item B, whichever is appropriate, and provide a detailed explanation if you answered Item B (attach additional sheets if necessary). Please review the Conflicts of Interest Policy when completing these items.

Item A: I am not aware of any relationship or interest or situation involving myself or my immediate family or any entity with which I am affiliated that might result in a conflict of interest between me and the charter school.

Initial Here: _____

Item B: There may be relationships or interests or situations involving myself or my immediate family or any entity with which I am affiliated that either currently or is likely to result in a conflict of interest between me and the charter school.

Initial Here: _____

Immediate family is an individual's brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law.

Item C: I am a board member, a committee member, an officer or an employee of the following organization(s) which may present a real or potential conflict:

I have read and understand the charter school's conflicts of interest policy and agree to be bound by it. I will promptly inform the Board of Directors of any material change that develops in the information contained in the foregoing statement.

Typed/Printed Name

Signature

Date

Adopted:
Revision Date:

Big Sur Charter School's Conflict of Interest Code Pursuant to California Corporation Code

[1] A disclosure statement is not required by law, but provides an additional level of review for the Board to ensure that there are no conflicts of interest.

Big Sur Charter School's Conflicts of Interest Policy Pursuant to the Political Reform Act of 1974 (Government Code §§ 87100, et seq.) and Government Code section 1090

attempting to use his/her official position to influence the decision if, for the purpose of influencing the decision, the official: 1) contacts or appears before any official in his/her agency or in an agency subject to the authority or budgetary control of his/her agency for the purpose of affecting the decision; or 2) contacts or appears before any official in any other government agency for the purpose of affecting the decision, and the public official acts or purports to act within his/her authority or on behalf of his/her agency in making contact.] [These prohibitions do not extend to ministerial actions; appearances as a member of the general public (d)(2); terms of employment (d)(3); public speaking (d)(4); academic decisions (d)(5); architectural and engineering documents (d)(6); other consulting services (d)(7).]

Board Make-Up: Not more than 49 percent of the persons serving on the Board of the Charter School may be Directors, or family members, that were compensated by the School for services rendered to it within the previous 12 months, whether as a full- or part-time employee, independent contractor or otherwise, excluding any reasonable reimbursement paid to a director as a director. **[Note: This section is included in accordance with the Corporations Code.]** No Directors shall serve on the Board of the Charter School if that person has a current financial interest in any contract made by him or her in his or her official capacity on the board, except that an employee Director is not disqualified from serving as a member of the Board of Directors because of that employee's employment status with the School.

Manner of Disqualification

Persons with Remote Interests in Contracts and Non-Interests in Contracts: When a Designated Person, other than a Board Member, determines that he/she should not make a decision because of a financial interest in a Contract, he/she should submit a written disclosure of the disqualifying interest to his/her immediate supervisor. The supervisor shall immediately reassign the matter to another employee and shall forward the disclosure notice to the Charter School Director, who shall record the employee's disqualification, and notify the Charter School Governing Board of the interest at its next meeting before the Governing Board discusses or votes on the item. In the case of the Charter School Director, this determination and disclosure shall be made in writing to the Governing Board.

Governing Board members shall orally disclose a Remote Interest, and in some instances a Non-Interest in a Contract, at the meeting during which consideration of the decision takes place. Employee Board members shall orally disclose an interest in any decision uniquely affecting that member's employment. This disclosure shall be made following the announcement of the agenda item, but before the discussion or vote commences. This disclosure shall be made part of the Board's official record. The disqualified Board

Big Sur Charter School's Conflicts of Interest Policy Pursuant to the Political Reform Act of 1974 (Government Code §§ 87100, et seq.) and Government Code section 1090

member shall then refrain from participating in the decision in any way, but may remain seated if desired.

If the decision is made during a closed session, the member's disqualification may be made orally during the open session before the body goes into closed session and shall be limited to a declaration that his/her recusal is because of a conflict of interest under Government Code section 87100. The declaration shall be made part of the official public record. The member shall not be present when the decision is considered in closed session or knowingly obtain or review a recording or any other non-public information regarding the decision.

The following must be confirmed in the affirmative prior to the Board's acceptance of a contract or transaction with a Designated Person with respect to a Remote or Non-Interest in a Contract:

- That the transaction is entered into for the benefit of the Charter School;
- That the transaction was fair and reasonable for the Charter School at the time it enters into the transaction;
- That after reasonable investigation under the circumstances, the Board determines, in good faith, that the Charter School could not have obtained a more advantageous arrangement with reasonable effort. Documentation of the results of the investigation shall be retained either in the Board minutes and/or in the school's financial files.

Disqualified Designated Persons shall not be counted toward achieving a quorum while the item is discussed.

Big Sur Charter School Education for English Learner and Long-term English Learner Policy

BSCS meets all applicable legal requirements for English learners and long-term English learners as it pertains to annual notification to parents, student identification, placement, program options, EL and core content instruction, teacher qualifications and training, reclassification to fluent English proficient status, monitoring and evaluating program effectiveness, and standardized testing requirements. BSCS will implement policies to assure proper placement, evaluation, and communication regarding ELs and the rights of students and parents.

Home Language Survey

The Charter School will administer the home language survey upon a student's initial enrollment into the Charter School. The Home Language Survey will be included on enrollment forms.

English Language Proficiency Assessment

All students who indicate that their home language is other than English will be tested with the English Language Proficiency Assessments for California (ELPAC). The ELPAC has four proficiency levels (Level 4: well developed; Level 3: moderately developed; Level 2: somewhat developed; and Level 1: minimally developed) and is aligned with the 2012 California ELD Standards.

The ELPAC consists of two separate assessments:

- Initial Assessment (IA): The ELPAC IA is used to identify students as either an English Learner, or as fluent in English. The IA is administered only once during a student's time in the California public school system based upon the results of the home language survey. The locally scored IA will be the official score. The IA is given to students in grades K–12 whose primary language is not English to determine their English proficiency status.
- Summative Assessment (SA) ELs will take the SA every year until they are reclassified as fluent English proficient. The ELPAC SA is only given to students who have previously been identified as an EL based upon the IA results, in order to measure how well they are progressing with English development in each of the four domains. The results are used as one of four criteria to determine if the student is ready to be reclassified as fluent English proficient, to help inform proper educational placement, and to report progress for accountability.

Both the ELPAC SA and IA are paper–pencil assessments administered in seven grade spans—K, 1, 2, 3–5, 6–8, 9–10, and 11–12. In kindergarten and grade 1, all domains are administered individually. In grades 2–12, the test is administered in groups, exclusive of speaking, which is administered individually.

Testing times will vary depending upon the grade level, domain, and individual student. Both the ELPAC IA and SA are given in two separate testing windows through the school year.

The IA testing window will be year-round (July 1–June 30). Any student whose primary language is other than English as determined by the home language survey and who has not previously been identified as an English Learner by a California public school or for whom there is no record of results from an administration of an English language proficiency test, shall be assessed for English language proficiency within 30 calendar days after the date of first enrollment in a California public school, or within 60 calendar days before the date of first enrollment, but not before July 1 of that school year.

The SA testing window will be a four-month window after January 1 (February 1–May 31). The English language proficiency of all currently enrolled English Learners shall be assessed by administering the test during the annual assessment window.

The Charter School will notify all parents of its responsibility for ELPAC testing and of ELPAC results within thirty days of receiving results from publisher. The ELPAC shall be used to fulfill the requirements under the Every Student Succeeds Act for annual English proficiency testing.

Reclassification Procedures for English Learners

Reclassification procedures utilize multiple criteria in determining whether to classify a student as proficient in English including, but not limited to, the following:

- Assessment of language proficiency using an objective assessment instrument including, but not limited to, the ELPAC.
- Participation of the student's classroom teachers and any other certificated staff with direct responsibility for teaching or placement decisions of the student to evaluate the student's curriculum mastery.
- Parental opinion and consultation, achieved through notice to parents or guardians of the language reclassification and placement including a description of the reclassification process and the parents opportunity to participate, and encouragement of the participation of parents or guardians in the reclassification procedure including seeking their opinion and consultation during the reclassification process.
- Comparison of the student's performance in basic skills against an empirically established range of performance and basic skills based upon the performance of English proficient students of the same age that demonstrate to others that the student is sufficiently proficient in English to participate effectively in a curriculum designed for students of the same age whose native language is English.

Strategies for English Learner Instruction and Intervention

BSCS employs teachers with training in Specifically Designed Academic Instruction in English (SDAIE) methods and strategies. Students with limited English proficiency receive instructional support and specialized curriculum based on their individual needs. Parents are offered coaching and strategies in supporting students with English language development.

Monitoring and Evaluation of English Learners Program Effectiveness

The evaluation for the program effectiveness for ELs in the Charter School will include:

- Adhering to Charter School-adopted academic benchmarks by language proficiency level and years in program to determine annual progress
- Monitoring of teacher qualifications and use of appropriate instructional strategies based on program design
- Monitoring of student identification and placement
- Monitoring of parental program choice options
- Monitoring of availability of adequate resources

Students designated as LTELs are emergent bilinguals who possess often unidentified and untapped literacy and linguistic abilities they can leverage for success. To support their success, all educators can engage LTELs and their families in investigating factors beyond English language proficiency that influence students' educational experiences to better understand why students remain identified as LTELs, how to leverage their strengths, and co-develop goals that support their success. Additionally, school leaders across contexts (low, middle, or high incidence districts) can:

- Ensure overarching conditions needed to support the success of all English learners, including LTELs, are in place. The [Blueprint for English Learner Success](#) presents these essential conditions and actions educators can take to achieve them.
- Develop an internal definition and process for identifying and supporting students who need additional support before they reach the 5-year mark^[1] using information gathered about the specific students served and supports developing instructional and programmatic next steps. Engage ELs in identifying issues and developing this definition.
- Provide classroom teachers with regular and ongoing professional learning focused on addressing deficit-thinking and learning how to use strategies that promote rigorous standards-based language instruction for students designated as LTELs.
- Provide time for collaboration between ESL and other teachers of LTELs so they can support explicit language and literacy development throughout the day. Students designated as LTELs make great progress when all their teachers "[develop language and literacy objectives that support their content objectives](#)". Beyond regular and sustained time for collaboration, this requires ensuring the ESL curriculum focuses on the type of academic language LTELs will need to be successful in content areas.

- Establish a team and processes (regular meetings, data analysis protocols, etc.) to review LTELs' progress and trigger interventions, supports, and/or programmatic and placement changes. Include ESL and content teachers in the team and incorporate LTELs' and their families' input when reviewing progress and setting goals. Ensure the team reviews evidence of student learning (work samples, performance data). Maintain a flexible schedule so students can move to new courses as they progress in their language development.

[1] Cashiola, L. & Potter, D. (2020).

Big Sur Charter School's Freedom of Expression Policy and Procedures

Students attending the School have the right to exercise free expression including, but not limited to the use of bulletin boards, distribution of printed materials or petitions, wearing buttons, badges and other insignia and the right of expression in official publications, whether or not the publications or other means of expression are supported financially by the school or by use of school facilities. The Board of Directors ("Board") respects students' rights to express ideas and opinions, take stands and support causes, whether controversial or not, through their speech, their writing, their clothing, and the printed materials they choose to post or distribute.

Student liberties of expression shall be limited only as allowed by law in order to maintain an orderly school environment and to protect the rights, health and safety of all members of the School community.

Students will not be disciplined solely on the basis of speech or other communication that would be constitutionally protected when engaged in outside of school, but may be disciplined for harassments, threats, or intimidation unless constitutionally protected. Education Code § 48950.

FREEDOM OF EXPRESSION PROCEDURES

Circulation of Petitions and Other Printed Matter

Students shall be allowed to distribute petitions and other printed matter subject to these procedures.

The time of distribution shall be limited to the half hour before school begins, during the lunch period, and the half hour after school is dismissed.

The manner of distribution shall be such that coercion is not used to induce students to accept the printed matter or to sign petitions. Materials are not to be left undistributed or stacked for pick-up while unattended at any place in the School or on School grounds.

Buttons, Badges and Other Insignia of Symbolic Expression

Students will be permitted to wear buttons, badges, armbands, and other insignia as a form of expression.

Students will be subject to disciplinary action when expressive activities such as the distribution of materials, wearing of buttons or displays, or posting of notices or other materials:

- Are obscene, libelous or slanderous;

Big Sur Charter School's Freedom of Expression Policy and Procedures

- Incite students so as to create a clear and present danger of the imminent commission of unlawful acts on school premises or of the violation of lawful School regulations or of the substantial disruption of the orderly operation of the School;
- Express or advocate racial, ethnic or religious prejudice so as to create a clear and present danger of imminent commission of unlawful acts on School premises or of the violation of lawful School regulations or of the substantial disruption of the orderly operation of the School;
- Are distributed in violation of the time, place and manner requirements;
- Are in violation of current federal, state and local laws.

Unofficial School Publications

School officials may not ban the distribution of non-School-sponsored publications on School grounds. Writers and editors of unofficial student publications who violate any state or federal law may be disciplined after distribution. Students distributing or posting any materials that are obscene, libelous or slanderous, or which demonstrably incite students to commit unlawful acts on School premises, violate School rules, or substantially disrupt the School's orderly operation will be subject to disciplinary action.

The following points apply to unofficial student publications:

- The School and its employees may disassociate themselves from the material printed inasmuch as it is not an official publication of the School.
- School officials may reasonably regulate the time, place and manner of distribution. This distribution will be limited to:
 - One half hour before school begins, during the lunch period, or the half hour after dismissal.
 - In locations that do not obstruct the normal flow of traffic within the School or at entrances.
- Without undue noise.
- No student shall use coercion to induce students or any other persons to accept printed matter or to sign petitions.
- "Distribution" means dissemination of a publication to students at a time and place of normal School activity, or immediately prior to or subsequent thereto, by means of handing out free copies, selling or offering copies for sale, accepting donations for copies of the publication, or displaying the student publication in areas of the School which are generally frequented by students.

School officials cannot:

- Prohibit the distribution of anonymous literature or require that literature bear the name of the sponsoring organization or author.
- Ban the distribution of literature because it contains advertising.

Big Sur Charter School's Freedom of Expression Policy and Procedures

- Create regulations that discriminate against non-School-sponsored publications or interfere with the effective distribution of non-sponsored publications provided such publications abide by time, place and manner regulations.

Official School Publications

Pupil editors of official school publications shall be responsible for assigning and editing the news, editorial and feature content of their publications subject to the limitations identified above. It shall be the responsibility of a journalism advisor(s) of pupil publications within the School to supervise the production of the pupil staff, to maintain professional standards of English and journalism and to maintain the provisions provided in the Education Code relating to student expression.

Other Forms of Student Expression

Forms of student expression may include, but are not limited to speech, debate, assemblies, posters, bulletin board announcements, and the wearing of buttons, badges and armbands. In general, the laws pertaining to all forms of student expression are the same. The rights of students to express their opinions are recognized by law and are not limited to verbal expression. The basic guidelines listed above for publications apply to all forms of student expression. No teacher or administrator shall interfere with such expression on the grounds that the message may be unpopular with students or faculty. In conforming to state and federal laws, student expression must obey copyright laws; for example, student posters cannot use nationally registered and copyrighted characters such as those from Walt Disney or "Peanuts" publications.

Courts have generally found that schools may impose discipline for conduct off campus when the conduct off-campus poses a threat to the safety, welfare or discipline of other schools. Over the last several years, courts have grappled with disciplining students for fake social media pages mocking administrators and other students, when those pages have been created off-campus. Make sure that if discipline is imposed for this type of behavior, there is an impact that the expression will have on the school's program.

A student shall be subject to discipline for off-campus expression, including expression on off-campus Internet web sites, when such expression poses a threat to the safety of other students, staff, or school property, or substantially disrupts the educational program. The School director will document the impact the expression had or could be expected to have on the school program.

Big Sur Charter School's Freedom of Expression Policy and Procedures

Distribution of Procedures Governing Student Rights

Site administrators will distribute copies of this Administrative Procedure to all teachers who are advisors of students who produce publications or present public performances. It is the responsibility of the School and site administrators to see that these guidelines are kept up-to-date and accurate.

Appeals

The pupil and a School staff member shall attempt to resolve the problem before consulting the administrative staff. If the issue cannot be resolved between the staff member and the pupil, the pupil may appeal the decision to the site administrator, and then to the Charter School Director or his/her designee. As a final step, the pupil may follow the School's complaint procedures as outlined in the Student/Parent Handbook.

Big Sur Charter School's Immigration Enforcement Policy Related to the Detention or Deportation of a Student's Family Member Policy

Responding to the Detention or Deportation of a Student's Family Member

The Charter School shall encourage families and students to be prepared in the event that a family member is detained or deported. The Charter School shall encourage families and students to:

- Know their emergency phone numbers;
- Know where to find important documentation such as birth certificates, passports, Social Security Cards, doctors' contact information, medication lists, and lists of allergies.

The Charter School shall permit students and families to update a student's emergency contact information as needed throughout the school year and to provide alternative contacts if not parent or guardian is available.

The Charter School shall ensure that families may include the contact information of a trusted adult guardian as a secondary emergency contact in the event a student's parent or guardian is ever detained.

The Charter School shall communicate to families that the information provided on the emergency cards will only be used to respond to emergency situations – and will never be used for any other purpose.

The student's emergency card contact information is the information that shall be used in the event a student's parent or guardian is detained or deported and the student must be released to an adult designated on that card. Alternately, the Charter School shall release the student into the custody of any individual who presents a Caregiver's Authorization Affidavit on behalf of the student.

The Charter School shall only contact Child Protective Services if school staff are unable to arrange for timely care through the methods outlined above or other instructions given by the parent or guardian.

Any attempt by a law-enforcement officer to access a school site or a student for immigration-enforcement purposes should be reported to the Bureau of Children's Justice in the California Department of Justice at BCJ@doj.ca.gov

Big Sur Charter School's Protection of Pupil Rights Amendment (PPRA) Policy

The Protection of Pupil Rights Amendment (PPRA), 20 U.S.C. § 1232h, requires Big Sur Charter School (BSCS) to notify you and obtain consent or allow you to opt your child out of participating in certain school activities. PPRA affords parents of elementary and secondary students certain rights regarding the conduct of surveys, collection and use of information for marketing purposes, and certain physical exams. These include, but are not limited to, the right to consent, notification and opt out opportunity, and inspection.

You have the right to **consent** before students are required to submit to a survey that concerns one or more of the following protected areas ("protected information survey") if the survey is funded in whole or in part by a program of the U.S. Department of Education (ED) –

1. Political affiliations or beliefs of the student or student's parent;
2. Mental or psychological problems of the student or student's family;
3. Sex behavior or attitudes;
4. Illegal, anti-social, self-incriminating, or demeaning behavior;
 - a. Critical appraisals of others with whom respondents have close family relationships;
 - b. Legally recognized privileged relationships, such as with lawyers, doctors, or ministers;
5. Religious practices, affiliations, or beliefs of the student or the student's parent; or
6. Income, other than as required by law to determine program eligibility.

You have the right to **receive notice and an opportunity to opt a student out of** –

1. Any other protected information survey, regardless of funding;
2. Any non-emergency, invasive physical exam or screening required as a condition of attendance, administered by the school or its agent, and not necessary to protect the immediate health and safety of a student, except for hearing, vision, or scoliosis screenings, or any physical exam or screening permitted or required under State law; and
3. Activities involving collection, disclosure, or use of personal information collected from students for marketing or to sell or otherwise distribute the information to others. (This does not apply to the collection, disclosure, or use of personal information collected from students for the exclusive purpose of developing, evaluating, or providing educational products or services for, or to, students or educational institutions.)

You have the right to **inspect**, upon request and before administration or use –

1. Protected information surveys of students and surveys created by a third party;
2. Instruments used to collect personal information from students for any of the above marketing, sales, or other distribution purposes; and

Big Sur Charter School's Protection of Pupil Rights Amendment (PPRA) Policy

3. Instructional material used as part of the educational curriculum.

These rights transfer from the parents to a student who is 18 years old or an emancipated minor under State law.

BSCS will also provide parents reasonable notification, such as through email, to parents of students who are scheduled to participate in protected information surveys and will provide an opportunity for the parent to opt his or her child out of participation of the specific activity or survey. Parents will also be provided an opportunity to review any pertinent surveys. This direct notification requirement is for the following:

- Collection, disclosure, or use of personal information collected from students for marketing, sales, or other distribution.
- Administration of any protected information survey not funded in whole or in part by ED.
- Any non-emergency, invasive physical examination or screening as described above.

Parents who seek additional resources on student privacy under PPRA may visit the Department's Student Privacy Policy Office website at <https://studentprivacy.ed.gov/>.

Parents who believe their PPRA rights have been violated may file a complaint online by selecting the PPRA complaint form option at <https://studentprivacy.ed.gov/file-a-complaint> or by mailing the form to the following address:

Student Privacy Policy Office
U.S. Department of Education
400 Maryland Avenue, S.W.
Washington, D.C. 20202

Big Sur Charter School's Public Solicitation on School Grounds Policy

Purpose

The property, buildings, or facilities owned or controlled by the Charter School are not open for assembly, speech, or other activities as are the public streets, sidewalks, parks and other public places. The Charter School's legal duty to operate and maintain a safe and secure campus requires that the time, place, and manner of assembly, speech, and other activities on the Charter School premises be regulated. Accordingly, it is against Charter School policy for anyone to solicit, peddle, canvass, or otherwise engage in contacting Charter School faculty, staff, or students for any purpose not specifically approved in advance by the Charter School governing board.

Solicitation on Campus

1. The term *solicitation* shall mean (1) the sale, lease, rental or offer for sale, lease, rental of any property, product, merchandise, publication, or service, whether for immediate or future delivery; (2) an oral statement or the distribution or display of printed material, merchandise, or products designed to encourage the purchase, use, or rental of any property, product, merchandise, publication, or service; (3) an oral or written appeal or request to support or join an organization other than a registered student, faculty, or staff organization; (4) the receipt of or request for any gift or contribution; or (5) the request to support or oppose or to vote for or against a candidate, issue, or proposition appearing on a ballot at any election held pursuant to state or federal law or local ordinances.
2. To cooperate in publicizing community services, special events, and public meetings of interest to students and parents/guardians, the Charter School Governing Board or its designee will approve or reject the distribution and/or posting of printed materials to students and/or through the Charter School which extend the community's cultural, recreational, artistic, or service educational opportunities.
3. Materials to be distributed shall not include any which:
 - a. Are obscene, libelous, slanderous, or which incite students to commit unlawful acts, violate the Charter School's policies, procedures, and rules, or disrupt the Charter School's orderly operations.
 - b. Discriminate on the basis of sex, race, color, ancestry, national origin, religion, disability or any other protected category.
 - c. Attack or disparage any group or person based upon sex, race, color, ancestry, national origin, religion, disability or any other protected category.

Big Sur Charter School's Public Solicitation on School Grounds Policy

- d. Request students or other family members to contribute in any way to the funds of, or become members of, or to work for, any organization not directly under the control of Charter School authorities, unless the organization is a nonpartisan, charitable organization organized for charitable purposes by an act of Congress or under the laws of the State of California, the purpose of the solicitation is nonpartisan and charitable and the solicitation has been approved by the Charter School governing board or designee. To qualify as an organization exempted in this Section [II][C][4], the organization must present to the Charter School governing board or designee written evidence from the Internal Revenue Service that the organization has been granted tax-exempt status under Internal Revenue Code Section 501(a) as an organization described in Internal Revenue Code Section 501(c)(3). Solicitation must be conducted only in an area designated by the Charter School governing board or designee. Any person soliciting on behalf of such organizations must have credentials identifying him or her as authorized agents of the organization. Permission to solicit may not be used by the organization as an endorsement of the Charter School.
 - e. Express support for or against specific political campaigns, issues, or activities, including statewide ballot initiatives and other ballot measures
 - f. Express support for or against a specific religion or religious viewpoint, church, or denomination.
4. Advertising of commercial products or services may be conducted only when prior approval has been granted by the Charter School Governing Board. In no event shall any material be distributed advertising alcohol or tobacco products or otherwise encouraging students to consume alcohol or tobacco products. Students shall not be asked or otherwise be required to distribute commercial advertising materials.
 5. No handbills or fliers shall be distributed or placed in/or on cars parked on the Charter School premises. No loudspeakers are to be used at any time during class hours.

Big Sur Charter School's Public Solicitation on School Grounds Policy

Permission Procedures

1. All materials to be distributed or posted shall first be submitted to the Charter School Governing Board or designee for approval. All materials shall bear the name and contact location of the sponsoring organization.
2. Materials which have not been approved by the Charter School Governing Board or designee shall be removed if posted. Any person distributing materials that have not been approved by the Charter School Governing Board or designee shall cease distribution immediately upon demand by a Charter School official.

Big Sur Charter School's Residency Policy

California law requires that certain residency requirements are established in order for a student to be enrolled in an independent study charter school for which average daily attendance may be claimed. California law requires that a student be a California resident and requires that the student is a resident of the county in which the apportionment claim is reported or of a county immediately adjacent to the county in which the apportionment claim is reported.

A student is considered a resident of California in the county of Monterey or any of its adjacent counties if they reside with a parent, guardian, or caregiver in the state. This residence must be more than just a temporary stay, indicating a place of abode with some degree of permanency. Owning a home in California or in a particular county does not qualify a student to attend the School, unless it can be shown that the student is also living in the home at least three days per week during the school year.

The school requires a new proof of residency before the student is unconditionally enrolled and will require a new proof of residence at the beginning of each school year. A student on an extended vacation lasting up to four months (cumulatively or consecutively) in one school year, will not be deemed to have lost California residency. All materials will be mailed to, and any in person services will be held at, the address identified in the student's records in his/her proof of residence documentation, unless an alternative location is agreed upon by the teacher of record.

If there is reason to believe that a student's residency is in question, the School may investigate in order to determine the authenticity of the home address on file with the school. When it is determined that a student lives outside of California and/or an authorized county the School will provide written notice of the determination of non-residency within five days of the School's intention to disenroll the student.

The notice shall contain an explanation of the parent/guardian/education rights holder's right to request a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses and at which the pupil has the right to bring legal counsel or an advocate to dispute the finding of non-residency. If the parent/guardian/educational rights holder does not request a hearing within five days of receipt of the notice, the right to a hearing is waived and the student will be immediately disenrolled. If the student's parent, guardian or educational rights holder initiates the hearing, the student shall remain enrolled and shall not be disenrolled until the School issues a final decision. If the parent, guardian or educational rights holder initiates the hearing, from the time the School sends the notice until the resolution of the residency hearing, the School will not provide enrichment funds for the student.

Big Sur Charter School's Residency Policy

Exceptions: If any of the following categories of students lose residency due to their status as described below, the School shall serve these children as articulated and in accordance with law.

Children of Military Families

The School will serve children of military families as follows:

- 1) Allow the student to continue his or her education in the School, regardless of change of residence of the military family during that school year, for the duration of the student's status as a child of a military family; or
- 2) For a student whose status changes due to the end of military service of his or her parent during a school year, comply with either of the following, as applicable:
 - a) If the student is enrolled in kindergarten or any of grades 1 to 8, inclusive, allow the student to continue his or her education in the School through the duration of that academic school year;
 - b) If the child is enrolled in high school, allow the student to continue his or her education in the School through graduation.

"Children of military families" means a school-aged child or children, enrolled in Kindergarten through 12th grade, in the household of an active duty member. "Active duty" means full-time duty status in the active uniformed service of the United States, including members of the National Guard and Reserve on active duty orders.

Homeless Youth

The School will be considered to be a pupil's school of origin for a homeless youth when the child attended the School when permanently housed or was last enrolled in the School before becoming homeless. The School will serve homeless youth, as defined below, whose residency has changed as follows:

- 1) Allow the student to continue his or her education in the School, for the duration of homelessness.
- 2) If the pupil is no longer homeless before the end of the academic year, either of the following apply:
 - a. If the homeless youth is in high school, the School shall allow the formerly homeless child to continue his or her education in the School through graduation.
 - b. If the homeless youth is in kindergarten or any of grades 1 to 8, inclusive, the School shall allow the formerly homeless youth to continue his or her education in the School through the duration of the academic year.

The term "homeless youth" or "homeless pupil" shall mean individuals who lack a fixed, regular, and adequate nighttime residence (within the meaning of 42 USC section 11302(a)(1)); and includes—

Big Sur Charter School's Residency Policy

- 1) children and youths who 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; or are abandoned in hospitals;
- 2) children and youths who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings (within the meaning of section 42 USC section 11302(a)(2)(C));
- 3) children and youths who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and
- 4) migratory children (as such term is defined in 20 USC section 6399) who qualify as homeless for the purposes of this part because the children are living in circumstances described in clauses (i) through (iii).

Foster Youth

The School will be considered to be a pupil's school of origin for a foster youth when the child attended the School at the initial detention or placement, or any subsequent change in placement of a foster child for the duration of the jurisdiction of the court. The School will serve former foster youth, as defined below, whose residency has changed as follows:

- 1) If the jurisdiction of the court is terminated before the end of an academic year, the School shall allow a former foster child who is in kindergarten or any of grades 1 to 8, inclusive, to continue his or her education in the school of origin through the duration of the academic school year.
- 2) If the jurisdiction of the court is terminated while a foster child is in high school, the School shall allow the former foster child to continue his or her education in the School through graduation.

The term "foster youth" means a child who has been removed from his or her home pursuant to Welfare and Institutions ("W&I") Code section 309, is the subject of a petition filed under W&I Code sections 300 or 602 or has been removed from his or her home and is the subject of a petition filed under W&I Code sections 300 or 602.

Migratory Youth

The School will be considered to be a pupil's school of origin for a migratory youth when the child attended the School at the time the pupil's status changed to a pupil who is a migratory youth. The School will serve migratory youth, as defined below, whose residency has changed as follows:

- 1) If the migratory youth is enrolled in kindergarten or any of grades 1 to 8, inclusive, allow the pupil to continue their education in the School through the duration of that academic school year.

Big Sur Charter School's Residency Policy

- 2) If the migratory youth is enrolled in high school, allow the pupil to continue their education in the School through graduation.

The term "migratory youth" means a child who has moved with a parent, guardian or other person having custody, from one school to another, either within the State of California or from another state within the 12-month period immediately preceding his or her identification as such a child, in order that the child, a parent, guardian or other member of his or her 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. "Migratory youth" includes a child who, without the parent or guardian, has continued to migrate annually to secure temporary or seasonal employment in an agricultural or fishing activity.