STAFF ANALYSIS, RECOMMENDATIONS, AND PROPOSED FINDINGS OF FACT REGARDING REVIEW OF SUNRISE MIDDLE SCHOOL CHARTER RENEWAL PETITION

OCTOBER 21, 2026, posted OCTOBER 6, 2026

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Escuela Xochitl Tonatiuh, Inc., doing business as (dba) Sunrise Middle School (Sunrise) is seeking approval to renew a Santa Clara County independent, district appeal charter middle school serving students in grades 5-8. Sunrise was initially approved on appeal from San Jose Unified School District (SJUSD) March 19, 2014, for a five year term after its renewal petition was denied by SJUSD. Sunrise's current term expires June 30, 2027, as its term was extended by operation of law by two years in 2021 and an additional year in 2023. Sunrise has requested renewal for a term of five years from July 2027 through June 2032, due to its designation by the California Department of Education (CDE) as a school in the middle performing category. Sunrise, located within the SJUSD boundaries, currently serves approximately 320 students.

PROCEDURAL STATUS

The Charter Schools Department of the Santa Clara County Office of Education (County Office of Education or SCCOE) received a renewal charter petition (Renewal Petition or Charter) from Sunrise on July 23, 2026. Escuela Xochitl Tonatiuh, Inc. (EXTI) is doing business as Sunrise Middle School. *Education Code (EC)* Sections 47607 and 47607.2 determine the length of charter renewal based on a charter school's placement in the high, middle, or low performance categories established by *AB* 1505. Pursuant to criterion in *EC* Sections 47607(c) and 47607.2, Sunrise is in the middle performing category, and the school qualifies for a five-year renewal term (see further analysis below). If the charter is renewed by the Santa Clara County Board of Education (SCCBOE or County Board of Education[1]), the new term of the Charter would begin on July 1, 2027, and run through and include June 30, 2032. Renewals of district appeal charters are governed by the standards and criteria set forth in *EC* Sections 47605, 47607 and 47607.2.

On September 2, 2026, the SCCBOE held a public hearing on the Sunrise Renewal Petition in accordance with the requirement to do so within 60 days of receipt of submission of the Renewal Petition. On September 9, 2026, SCCOE Staff conducted a renewal site visit and held renewal interviews with Sunrise's parents, students, staff, board members, and representatives of Sunrise leadership.

Pursuant to *EC* Sections 47607, 47607.2 and 47605, the County Board of Education has 90 days from receipt of the renewal application to act, which may be extended by an additional 30 days by mutual agreement. SCCBOE will hold the decision hearing October 21, 2026, to act on the Sunrise request for renewal.

In accordance with Board Policy 0420.4, SCCOE and Sunrise developed a Memorandum of Understanding in 2019 (2019 MOU). By its terms, this 2019 MOU and any addenda thereto "shall continue in full force and effect during the period of any renewal granted by the SCCBOE or during the pendency of an appeal of a denial of a renewal request unless and until such time as the Parties enter into a replacement MOU or specifically agree in writing that the MOU is terminated." The 2019 MOU and any addenda thereto govern the respective fiscal, operational,

[1] Throughout this document, references to "SCCBOE" or the "County Board of Education" are specifically to the Santa Clara County Board of Education. However, for purposes of convenience, the Santa Clara County Board of Education, the Santa Clara County Superintendent of Schools, and the Santa Clara County Office of Education may be collectively or separately referred to herein as "SCCOE."

administrative responsibilities, legal relationships, and other matters not otherwise fully addressed or resolved by the terms of the current charter or the Renewal Petition, pending any further direction or recommendations by the SCCBOE, including SCCBOE's adoption of the SCCOE's recommendations and recommended findings and entry into a replacement or supplementing MOU and/or addendum. By their terms, the 2019 MOU and any addenda thereto are incorporated into the Renewal Petition by reference, therefore, their terms supplement the Renewal Petition submitted by Sunrise and were considered as part of SCCOE's analysis of the Renewal Petition and informed this analysis, including the assessment of whether the Renewal Petition includes reasonably comprehensive descriptions of each of the required Charter elements, whether or not any specific provision of the 2019 MOU and any addenda thereto are referenced in this analysis, and they continue to bind the Parties unless and until revised or replaced by mutual agreement of the Parties, and if the parties enter into a new MOU and/or addendum, as recommended herein, provisions from the 2019 MOU and any addenda thereto may need to be incorporated therein or the 2019 MOU and any addenda thereto remain in effect.

SCCOE has provided and Sunrise has approved and executed an updated memorandum of understanding (2026 MOU) that is consistent with changes to law since entering into the 2019 MOU and any addenda thereto and reflects SCCOE's current best practices. On September 14, 2026, Sunrise executed the new MOU.

The complete Renewal Petition on which the SCCBOE is acting is attached to the agenda item in Board Docs and is also available for review at the following location: 2026_Sunrise_Petition.pdf

CRITERIA FOR RENEWAL OF A CHARTER PETITION

Effective July 1, 2020, the legal standards for determining whether a charter petition should be renewed were updated. *EC* Section 47607(b) specifies that charter renewals "are governed by the standards and criteria described in Section 47605, and shall include, but not be limited to, a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed."

Pursuant to *EC* Section 47605, a renewal charter petition may be denied on the basis of written factual findings that support one or more of the following:

1. The charter school presents an unsound educational program for the pupils to be enrolled in the charter school.
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
3. The petition does not contain an affirmation of each of the conditions required by statute.
4. The petition does not contain a reasonably comprehensive description of all the required elements.
5. The petition does not contain a declaration of whether the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of the Educational Employment Relations Act (EERA).

There are additional bases on which material revision may be denied, which are not pertinent to the current Charter.

As an "additional criterion" for determining whether a charter should be renewed, the chartering authority is required to consider the charter school's performance on the state and local indicators included in the California School Dashboard. For this purpose, charter schools are now divided into high, middle, and low performance categories, plus Dashboard Alternative Status Schools ("DASS"), based on their performance during the two consecutive years immediately preceding the renewal decision. The pertinent renewal standards and the available length of the renewal term are dependent on this categorization. (*EC* Section 47607 and 47607.2.)

The CDE annually creates a list of all charter schools and ranks their academic performance indicators from the California School Dashboard, specifying whether each school is in the high, middle, or low performing category,

or is a DASS program school. This list was intended to relieve the burden on chartering authorities and provide a starting place for the renewal process. The CDE has designated Sunrise as a "middle" performing charter school for purposes of this renewal request.

As defined in *EC* Section 47607.2, "middle" performing charter schools are any charter school not deemed as "high" or "low" performing and are eligible to be considered for a five-year renewal term.

In determining whether to renew a middle performing charter, the chartering authority is to consider the following:

(1) The schoolwide and subgroup performance on the state and local indicators on the Dashboard, giving greater weight to measurements of academic performance.
(2) The chartering authority shall provide greater weight to performance on measurements of academic performance in determining whether to grant a charter renewal.
(3) In addition to the state and local indicators, the chartering authority shall consider clear and convincing evidence demonstrated by verified data showing either of the following:
    a. The school achieved measurable increases in academic achievement, as defined by at least one year's progress for each year in school.
    b. Strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates equal to similar peers.

The chartering authority may deny a "middle" performing school on these bases only by making written factual findings, setting forth specific facts to support the findings, that the school:

i. Failed to meet or make sufficient progress toward meeting standards that provide a benefit to the pupils of the school;
ii. Closure of the school is in the best interest of pupils; AND
iii. If applicable, the decision provided greater weight to performance on measurements of academic performance.

Also, a chartering authority may deny renewal of a charter school in any of the performance categories if it finds the school is demonstrably unlikely to successfully implement the program due to any of the following:

a. Substantial fiscal factors,

b. Substantial governance factors, or

c. The charter school does not serve all pupils who wish to attend.

In such cases, the chartering authority must provide the charter school with at least 30 days' notice of the alleged violation(s) and provide the charter school with a reasonable opportunity to cure the violation(s), including a corrective action plan proposed by the charter school. Pursuant to *EC* Section 47607(e), the County Board of Education may then deny renewal on these bases only if it makes either of the following findings:

a. The corrective action proposed by the charter school has been unsuccessful

b. The violations are sufficiently severe and pervasive as to render a corrective action plan unviable

DETERMINATION CRITERIA FOR RENEWAL OF SUNRISE

As stated above, CDE has designated Sunrise as a school in the middle performance category for purposes of this renewal. In its Renewal Petition, Sunrise states it meets the minimum required academic performance standards, and its academic performance supports Charter renewal. To assess its academic performance against the criteria

for middle-performing charter schools, Sunrise submitted its data from the California Assessment of Student Performance and Progress ("CAASPP") as well as comparison data for the local district and local district schools Sunrise students would otherwise have attended. Sunrise states the data submitted on pages 12 through 19 of the Renewal Petition establishes Sunrise as a school in the middle performing category, meeting the criteria for charter renewal. Staff has not reproduced all the information provided by Sunrise in this Staff Analysis and Proposed Findings of Fact but incorporates it and the CAASPP data herein by this reference.

The SCCBOE requested from Sunrise additional data and information in response to questions asked during the public hearing of the Charter renewal on September 2, 2026. On September 3, 2026, Sunrise provided the information.

The data below represents key data provided by Sunrise and/or available for consideration of Sunrise's academic performance.

School Academics

California School Dashboard Data

In 2017, the State of California instituted the California School Dashboard (https://www.caschooldashboard.org/) to help parents and educators identify strengths and areas for improvement. The Dashboard reports how districts, schools (including charter and DASS schools), and student groups are performing across state and local measures. For state measures, performance is based on two factors: (1) current year results, or Status; and (2) whether results improved or declined from the prior year, or Change. Performance on state measures, using comparable statewide data, is represented by one of five colors with Red being the lowest and Blue being the highest (see Object 1 below). A performance level, or color is not provided on the Dashboard when a student group has fewer than 30 students. However, the Status and Change data will be displayed. Further, when a student group has fewer than 11 students, the group does not receive a performance level (color), and the group's Status and Change are not displayed to protect the anonymity of the students. This information is represented by using a grey color gauge with the words "No Performance Color."

Object 1: California Dashboard Performance Color Chart



The following data is based on 2024 and 2025 Dashboard data which shows the performance level colors, or the Status from 2024-25, and the Change, or the difference (growth or decline), from 2023-24.

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Object 2: Sunrise Performance on 2025 California School Dashboard

	2025 CALIFORNIA SCHOOL DASHBOARD									
	ELA		Math		ELPI		Chronic Absenteeism		Suspension	
	Rate	Level	Rate	Level	Rate	Level	Rate	Level	Rate	Level
All Students	-41.9 DFS	YELLOW	-37.1 DFS	YELLOW	57.4%	GREEN	36.4%	RED	2.2%	ORANGE
English Learners (EL)	-62.0 DFS	YELLOW	-53.9 DFS	YELLOW	57.4%	GREEN	34.1%	RED	3.6%	ORANGE
Long-Term EL (LTEL)	-89.3 DFS	ORANGE	-90.2 DFS	YELLOW	64.9%	GREEN	32.8%	RED	6.3%	ORANGE
Socioeconomically Disadvantaged (SED)	-46.2 DFS	YELLOW	-41.0 DFS	YELLOW			36.8	RED	2.5%	ORANGE
Students with Disabilities (SWD)	-91.5 DFS	ORANGE	-121 DFS	ORANGE			47.9	RED	4.2%	ORANGE
Hispanic/Latino	-46.7 DFS	YELLOW	-44.9 DFS	YELLOW			36.8	RED	2.5%	ORANGE

**No performance color (NPC) given for groups of less than 30 students. Status rates are not given for groups of less than 11 students.*
Data retrieved from: https://www.caschooldashboard.org

In 2025-26, Sunrise received a Distance from Standard (DFS) score of -41.9 in ELA and increased 14.7 points from the prior year, making the performance level for all students Yellow. Sunrise received a DFS score of -37.1 in Math and increased 26.3 points from the prior year, making the performance level for all students Yellow. Sunrise also increased 7.4 percentage points from the prior year and received Green on the English Learner Progress Indicator (ELPI).

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Object 3: 2025 and 2024 California School Dashboard Student Group Report for Sunrise

	Suspension Rate		Chronic Absenteeism		English Language Arts		Mathematics		English Learner Progress	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
All	GREEN 1.8%	ORANGE 2.2%	YELLOW 31.3%	RED 36.4%	ORANGE -56.6 DFS	YELLOW -41.9 DFS	ORANGE -63.4 DFS	YELLOW -37.1 DFS	ORANGE 50.0%	GREEN 57.4%
EL	ORANGE 2.1%	ORANGE 3.6%	ORANGE 32.6%	RED 34.1%	RED -85.5 DFS	YELLOW -62.0 DFS	ORANGE -88.9 DFS	YELLOW -53.9 DFS	ORANGE 50.0%	GREEN 57.4%
LTELs	YELLOW 2.0%	ORANGE 6.3%	ORANGE 32.7%	RED 32.8%	RED -95.1 DFS	ORANGE -89.3 DFS	RED -118.1 DFS	YELLOW -90.2 DFS	GREEN 59.2%	GREEN 64.9%
SED	GREEN 1.3%	ORANGE 2.5%	YELLOW 32.3%	RED 36.8%	ORANGE -60.0 DFS	YELLOW -46.2 DFS	ORANGE -66.4 DFS	YELLOW -41.0 DFS		
SWD	YELLOW 2.0%	ORANGE 4.2%	ORANGE 40%	RED 47.9%	RED -110.9 DFS	ORANGE -91.5 DFS	RED -145.7 DFS	ORANGE -121 DFS		
Hispanic/ Latino	GREEN 1.9%	ORANGE 2.5%	YELLOW 31.7%	RED 36.8%	ORANGE – 61.7 DFS	YELLOW -46.7 DFS	ORANGE -69.9 DFS	YELLOW -44.9 DFS		
White	NPC	NPC 0%	NPC	NPC 54.5%	NPC	NPC -12.5 DFS	NPC	NPC		
Asian	NPC 0%	NPC	NPC 8.3%	NPC	NPC	NPC	NPC	NPC		
Homeless	ORANGE 6.3%	BLUE 0%	ORANGE 27.1%	RED 41.7%	ORANGE – 82.4 DFS	YELLOW -47.4 DFS	YELLOW -67.9 DFS	YELLOW -26.8 DFS		

**No performance color (NPC) given for groups of less than 30 students. Status rates are not given for groups of less than 11 students.*
Data retrieved from: https://caschooldashboard.org

Some areas of the Sunrise's Dashboard have no performance color ("NPC") due to the small size of the student group. Object 3 above shows Sunrise's status for both the 2024 and 2025 Dashboard indicators for all students and all numerically significant student groups.

Object 4 below shows the Status and Change information from the 2024 and 2025 Dashboard indicators. For most of the Dashboard measures, the desired outcome is a high number or percent in the current year as well as an increase from the prior year. A distinguishing feature of the suspension and chronic absenteeism measures is the desired outcome for low suspension and chronic absenteeism rates, which means a low percent in the current year and a decline from the prior year rate. At Sunrise, both suspensions and chronic absenteeism rates maintained or increased for all students and for most numerically significant student groups, except for a 6.3% decrease in suspension rate for homeless, garnering a Blue indicator for this group.

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Object 4: 2024 and 2025 California School Dashboard Student Status and Change Report for Sunrise

	Suspension Rate		Chronic Absenteeism		English Language Arts		Mathematics		English Learner Progress	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
All	Maintain 0%	Increased 0.4%	Declined 13.6%	Increased 5.1%	Declined 20 pts	Increased 14.7 pts	Declined 9.9 pts	Increased 26.3 pts	Declined 7.5%	Increased 7.4%
EL	Increased 2.1%	Increased 1.5%	Declined 9%	Increased 1.5%	Declined 28 pts	Increased 23.5 pts	Declined 14.2 pts	Increased 35 pts	Declined 7.5%	Increased 7.4%
LTELs	Increased 2%	Increased 4.3%	Declined 12%	Maintain 0.2%	Declined 21.1 pts	Increased 5.9 pts	Declined 22.3 pts	Increased 27.9 pts	Increased 2.4%	Increased 5.4%
SED	Declined 0.7%	Increased 1.1%	Declined 12.7%	Increased 4.5%	Declined 21.2 pts	Increased 13.8 pts	Declined 11.2 pts	Increased 25.4 pts		
SWD	Increased 2%	Increased 2.2%	Declined 14.5%	Increased 7.9%	Declined 35.1 pts	Increased 19.4 pts	Declined 44.8 pts	Increased 24.7 pts		
Asian	NPC	NPC	NPC	NPC	NPC	NPC	NPC	NPC		
Hispanic/ Latino	Maintain 0.1%	Increased 0.5%	Declined 12.4%	Increased 5.1%	Declined 22.4 pts	Increased 14.9 pts	Declined 11.8 pts	Increased 24.1 pts		
White	NPC	NPC	NPC	NPC	NPC	NPC	NPC	NPC		
Homeless	Increased 6.3%	Declined 6.3%	Declined 7.8%	Increased 14.6%	Increased 3.3 pts	Increased 35.0 pts	Increased 9.3 pts	Increased 41.1 pts		

**No performance color (NPC) given for groups of less than 30 students. Status rates are not given for groups of less than 11 students.*
Suspension Rate and Chronic Absenteeism are reverse metrics, therefore increasing in score is not desired.
Data retrieved from: https://caschooldashboard.org

Objects 5 and 6 below show data comparing the Dashboard indicators for all students and by student group for Sunrise and the State on the 2024 (2023-24) and 2025 (2024-25) Dashboards. On the 2024 (2023-24) Dashboard, Sunrise outperforms the State in Suspension Rate for all categories; in ELA for LTELs; in Math for All students, EL, LTELs, SED, and Hispanic populations; and on the ELPI for all indicators (as indicated by the content data in Bold). On the 2025 (2024-25) Dashboard, Sunrise outperforms the State in Suspension Rate for All students, SED, LTELs, and Hispanic populations; in ELA with the LTELs group; in Math for EL, SED, and Hispanic populations; and on the ELPI for all indicators (as indicated by the content data in Bold). Notably, Sunrise students outperform the State in multiple areas on both the 2024 and 2025 Dashboards in multiple indicators, causing Sunrise to be in the middle performance category.

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Object 5: 2025 California School Dashboard Student Group Data for Sunrise and the State

	Suspension Rate		Chronic Absenteeism		English Language Arts		Mathematics		English Learner Progress	
	Sunrise	State	Sunrise	State	Sunrise	State	Sunrise	State	Sunrise	State
All	**ORANGE 2.2%**	GREEN 2.9%	RED 36.4%	YELLOW 17.1%	YELLOW -41.9 DFS	YELLOW -8.1 DFS	**YELLOW -37.1 DFS**	YELLOW -42.4 DFS	**GREEN 57.4%**	YELLOW 46.4%
EL	ORANGE 3.6%	YELLOW 3.2%	RED 34.1%	YELLOW 18.1%	YELLOW -62.0 DFS	YELLOW -59.9 DFS	**YELLOW -53.9 DFS**	YELLOW -86.1 DFS	**GREEN 57.4%**	YELLOW 46.4%
LTELs	**ORANGE 6.3%**	YELLOW 7%	RED 32.8%	ORANGE 22.5%	**ORANGE -89.3 DFS**	ORANGE -104.5 DFS	**YELLOW -90.2 DFS**	ORANGE -158.9 DFS	**GREEN 64.9%**	GREEN 49.1%
SED	**ORANGE 2.5%**	GREEN 3.6%	RED 36.8%	ORANGE 21.7%	YELLOW -46.2 DFS	YELLOW -35.3 DFS	**YELLLOW -41.0 DFS**	YELLOW -72.9 DFS		
SWD	**ORANGE 4.2%**	YELLOW 5%	RED 47.9%	ORANGE 24.9%	ORANGE -91.5 DFS	ORANGE -89.4 DFS	ORANGE -121.0 DFS	ORANGE -120.7 DFS		
Hispanic/ Latino	**ORANGE 2.5%**	GREEN 3%	RED 36.8%	ORANGE 20.1%	YELLOW -46.7 DFS	YELLOW -33.7 DFS	**YELLOW -44.9 DFS**	YELLOW -73.6 DFS		

Data retrieved from: https://caschooldashboard.org

Object 6: 2024 California School Dashboard Student Group Data for Sunrise and the State

	Suspension Rate		Chronic Absenteeism		English Language Arts		Mathematics		English Learner Progress	
	Sunrise	State	Sunrise	State	Sunrise	State	Sunrise	State	Sunrise	State
All	**GREEN 1.8%**	GREEN 3.2%	YELLOW 31.3%	YELLOW 18.6%	ORANGE -56.6 DFS	ORANGE -13.2 DFS	ORANGE -63.4 DFS	ORANGE -47.6 DFS	**ORANGE 50.0%**	ORANGE 45.7%
EL	**ORANGE 2.1%**	GREEN 3.4%	ORANGE 32.6%	YELLOW 20.1%	RED -85.5 DFS	RED -67.6 DFS	**ORANGE -88.9 DFS**	ORANGE -93.4 DFS	**ORANGE 50.0%**	ORANGE 45.7%
LTELs	**YELLOW 2.0%**	ORANGE 8.1%	ORANGE 32.7%	YELLOW 23.9%	**RED -95.1 DFS**	RED -109.6 DFS	**RED -118.1 DFS**	RED -163.5 DFS	**GREEN 59.2%**	ORANGE 45.8%
SED	**GREEN 1.3%**	GREEN 4.0%	YELLOW 32.3%	YELLOW 23.4%	ORANGE -60.0 DFS	ORANGE -40.9 DFS	**ORANGE -66.4 DFS**	ORANGE -78.2 DFS		
SWD	**YELLOW 2.0%**	YELLOW 5.4%	ORANGE 40.0%	YELLOW 26.3%	RED -110.9 DFS	RED -95.6 DFS	RED -145.7 DFS	RED -124.3 DFS		
Hispanic/ Latino	**GREEN 1.9%**	GREEN 3.4%	YELLOW 31.7%	YELLOW 21.7%	ORANGE -61.7 DFS	ORANGE -39.3 DFS	**ORANGE -69.9 DFS**	ORANGE -79.2 DFS		

Data retrieved from: https://caschooldashboard.org

Object 7, below, shows the local indicators from the California Schools Dashboard. The local indicators are self-reported by each Local Education Area (LEA).

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Object 7: Local Indicators from the California Dashboard for Sunrise for 2024 and 2025

Indicator	2024 Status	2025 Status
Implementation of Academic Standards	Met	Met
Access to a Broad Course of Study	Met	Met
Basics: Teacher Credentials, Instructional Materials, Facilities	Met	Met
Parent and Family Engagement	Met	Met
Local Climate Survey	Met	Met

Data from Dashboard (https://www.caschooldashboard.org/) N/A = Data not available

Under the Local Indicator data for priority area 1, Basics: Teacher Credentials, Instructional Materials, Facilities, the Dashboard provides a report on the status of teacher credentials at a school with a comparison to the State Average. The 2024 Dashboard displays data from 2023 and the 2025 Dashboard shows 2024. In both years, Sunrise was below the State average for teacher credentialing.

Object 8: Local Indictor: Teacher Credentialing from the California Dashboard for Sunrise for 2024 and 2025

Dashboard Year	FTE	% of Teaching FTE in the Clear Credential Category	Out-of-Field	Ineffective	Incomplete	Statewide % of Teaching FTE in Clear Category
2023	19.0	74.4%	11.9%	12.4%	1.3%	83.2%
2024	19.0	63.9%	19.0%	5.3%	6.6%	82.5%

Data from Dashboard (https://www.caschooldashboard.org/) N/A = Data not available

CAASPP Data

The tables below reflect the CAASPP data (https://caaspp-elpac.cde.ca.gov/) verified by SCCOE staff while determining Sunrise's schoolwide student performance and progress relative to the district and schools with the largest student populations enrolled at Sunrise. The tables below constitute the most recent academic data available for review.

Object 9: Percentage of ALL STUDENTS At or Above Standard on CAASPP in ELA and Math at Sunrise, SJUSD, and Statewide for 2024-25

2024-25 CAASPP (ELA)			
Grade	**Sunrise**	**SJUSD**	**State**
5	N/A	52.25	48.80
6	25.01	48.62	48.06
7	47.83	50.87	49.65
8	31.46	49.40	47.84
All	34.84	49.81	48.82

2024-25 CAASPP (Math)			
Grade	**Sunrise**	**SJUSD**	**State**
5	25.00	41.62	36.03
6	32.30	42.32	36.60
7	40.00	42.26	36.08
8	37.07	38.98	33.94
All	35.96	41.97	37.30

Data retrieved from: https://caaspp-elpac.ets.org/caaspp/Default N/A - no data available because fewer than 11 students tested.

Object 9 above, reflect the 2024-25 CAASPP results in English Language Arts (ELA) and Math for Sunrise, SJUSD, and the State. In both ELA and Math, Sunrise is outperformed by SJUSD and the State. It should be noted that both SJUSD and the State include scores for grade levels not served by Sunrise.

Object 10: Four-Year Trend of the Percentage for ALL STUDENTS At or Above Standard on CAASPP ELA and Math at Sunrise, SJUSD, and Statewide

Four-Year Trend CAASPP (ELA)				
	21-22	**22-23**	**23-24**	**24-25**
Sunrise	36.97	36.70	32.01	34.84
SJUSD	51.53	39.57	49.53	49.81
State	47.06	46.66	47.04	48.82

Four-Year Trend CAASPP (Math)				
	21-22	**22-23**	**23-24**	**24-25**
Sunrise	25.42	26.56	28.30	35.96
SJUSD	38.57	50.42	40.86	41.97
State	33.38	34.62	35.54	37.30

Data retrieved from: https://caaspp-elpac.ets.org/caaspp/Default

Object 10, above, reflects schoolwide student achievement in ELA and Math across the last four years of CAASPP for Sunrise, SJUSD, and the State. In looking at the trends, Sunrise scores show declines from 2021-22 through 2023-24 but increase in 2024-25 for both ELA and Math. However, when compared to the State and SJUSD scores, both exceed Sunrise for the four comparable years. However, as both the State and SJUSD scores include grades, 3, 4, and 11, it prevents one-to-one comparisons unless looking at each grade level individually, which also show that the State and SJUSD outperformed Sunrise in all grades for both ELA and Math for 2024-25 and all grades for both ELA and Math, except grades 7 and 8 in Math (see object 7) where Sunrise outperformed the State.

Object 11: Four-Year Trend of the Percentage of Numerically Significant Student Groups At or Above Standard on CAASPP in ELA and Math for Sunrise Grades 5-8

ELA				
	21-22	**22-23**	**23-24**	**24-25**
ALL	36.97	36.70	32.01	34.84
SWD	14.71	21.43	9.09	12.20
Hispanic/ Latino	36.90	36.20	31.16	31.74
SED	36.91	37.35	31.50	33.07
EL	13.04	12.19	3.67	9.65

Math				
	21-22	**22-23**	**23-24**	**24-25**
ALL	25.42	26.56	28.30	35.96
SWD	8.82	9.76	6.82	7.32
Hispanic/ Latino	24.64	26.13	27.12	32.94
SED	26.78	27.20	27.34	33.97
EL	9.66	10.61	9.40	18.18

** Data retrieved from: https://caaspp-elpac.ets.org/caaspp/Default*

Object 11, above, reflects the CAASPP results for numerically significant student groups at Sunrise over the last four years. In both ELA and Math, the data shows mixed results in the percentages of all students and all numerically significant student groups performing at or above standard over the four years.

Object 12: Comparison of the Percentage of Students At or Above Standard on 2025 CAASPP ELA Results for Sunrise, SJUSD, State, and Schools Near Sunrise

2024-25 CAASPP (ELA)						
Group	**Sunrise**	**SJUSD**	**Hoover**	**Muwekma Ohlone**	**ACE Inspire**	**State**
ALL	34.84	49.81	34.87	25.90	17.62	48.82
SED	33.07	26.45	22.78	21.41	15.02	38.23
Hispanic/ Latino	31.74	30.52	28.07	28.92	17.02	38.84
EL	9.65	6.74	3.75	3.70	4.69	10.41
SWD	12.20	17.68	10.37	10.00	3.23	16.95

** Data retrieved from: https://caaspp-elpac.ets.org/caaspp/Default*

Object 13: Comparison of the Percentage of Students At or Above Standard on 2025 CAASPP Math Results for Sunrise, SJUSD, State, and Schools Near Sunrise

2024-25 CAASPP (Math)						
Group	**Sunrise**	**SJUSD**	**Hoover**	**Muwekma Ohlone**	**ACE Inspire**	**State**
ALL	35.96	41.97	23.74	15.46	20.21	37.30
SED	33.97	17.01	14.72	10.55	17.34	26.19
Hispanic/ Latino	32.94	19.66	16.91	17.32	19.68	25.74
EL	18.18	8.04	4.04	1.95	8.60	11.01
SWD	7.32	13.67	5.23	2.50	6.46	13.10

** Data retrieved from: https://caaspp-elpac.ets.org/caaspp/Default*

Objects 12 and 13 above, reflect the 2024-25 CAASPP data as compared to the State, SJUSD and the schools Sunrise students would otherwise have attended as well as schools in proximity to Sunrise: Hoover, Burnett, and ACE Inspire. Overall, Sunrise's ELA and Math scores are comparable or outperform the comparison schools in 2024-25 for all students and the numerically significant student groups (see the green highlights for schools and student groups which are outperformed by Sunrise). While Sunrise is outperformed in both ELA and Math for 2023-24 and 2024-25 (see the light red highlights) by the district and the State for all students and several student groups it must be noted that both SJUSD and the State also include scores for grades 3, 4, and 11 which makes direct comparison difficult and yet, Sunrise does outperform both entities in math for SED, Hispanic/Latino and EL.

ELPI/ELPAC Data

Object 14 below (from https://caaspp-elpac.cde.ca.gov/), reflects the 2024-25 English Learner Proficiency Indicator (ELPI) data as evidenced on English Language Proficiency Assessment of California (ELPAC) data. This is compared across Sunrise, the State, SJUSD, and the schools that Sunrise students otherwise would have attended: Hoover, Burnett, and ACE Inspire. Sunrise outperformed all comparison entities in all categories except the percentage of students who maintained level 4, where Sunrise was outperformed by all comparison entities (see the green highlights for entities outperformed by Sunrise and the light red highlights for entities that outperform Sunrise).

Object 14: 2025 Comparison of EL Progress Measured by ELPAC

	Sunrise	**SJUSD**	**Hoover**	**Muwekma Ohlone**	**ACE Inspire**	**State**
Increased one or more ELPI levels	*57.4%*	*43.9%*	*44.4%*	*35.1%*	*36.9%*	*45.2%*
Maintained level 4	*0.0%*	*0.4%*	*0.4%*	*0.5%*	*1.6%*	*1.3%*
Total % making progress	*57.4%*	*44.3%*	*44.7%*	*35.7%*	*38.2%*	*46.4%*
Performance Level	*Green*	*Yellow*	*Yellow*	*Yellow*	*Orange*	*Yellow*
Number of Students	*115*	*4,035*	*257*	*185*	*123*	*777,537*

Data retrieved from: https://caschooldashboard.org

Renewal Site Visit

On September 11, 2026, CSD staff conducted a Renewal Site Visit to the Sunrise campus. CSD staff visited classrooms, met with site and network leadership, and conducted focus group interviews with educational partners such as current students, parents, Sunrise board members, and teachers. During the visit, CSD staff observed instructional practices and routines consistent with the academic model outlined in the petition.

Finances

Object 15A below provides an eight-year historical financial summary for Sunrise from Fiscal Year (FY) 2018-19 through FY 2025-26. The financial data for FY 2025-26 is based on unaudited actuals, while prior years' data are supported by audited financial reports. Throughout the review period, Sunrise maintained reserves above the 4% minimum reserve requirement established in its Memorandum of Understanding with SCCOE and submitted the fiscal reports required by law and requested by SCCOE Charter Schools Department staff in a timely manner.

Sunrise's revenues and expenditures increased steadily during the historical review period. Total revenues increased from approximately $3.0 million in FY 2018–19 to $6.1 million in FY 2025–26, while total expenditures increased from approximately $3.1 million to $6.0 million.

Sunrise reported operating surpluses in six of the eight years reviewed. The school incurred deficits of approximately $(134,000) in FY 2018–19 and $(105,000) in FY 2022–23. The largest surplus, approximately $541,000, occurred in FY 2020–21, primarily due to an influx of state and federal COVID-19 funding to support school operations. Since FY 2023–24, Sunrise has maintained positive operating results; however, annual surpluses have been relatively modest, ranging from approximately $54,000 to $86,000. FY 2025–26 unaudited actuals reflect a surplus of approximately $60,000.

Sunrise's ending net assets increased from approximately $670,000 in FY 2018–19 to $1.6 million in FY 2025–26. The fund balance ratio increased from 21% to a high of 35% in FY 2020–21 and has remained stable at approximately 27% since FY 2022–23.

Overall, Sunrise's historical results demonstrate that the school has maintained positive net assets, reserves above the required minimum, and generally balanced its revenues and expenditures. The school's healthy fund balance provides a financial cushion; however, its relatively narrow operating margins may limit its ability to absorb enrollment declines, unexpected increases in expenditures, or revenue reductions without corresponding budget adjustments.

Based on historical financial information and fiscal reports reviewed, SCCOE Charter Schools Department staff is not aware of any significant financial concerns regarding Sunrise Middle School at this time.

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Object 15A: Sunrise Historical Financial Summary

		2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
[A]	Total Revenues	2,984,492	3,314,191	4,059,420	4,723,629	5,064,774	5,492,546	5,905,871	6,083,032
[B]	Total Expenses	3,118,889	3,281,403	3,518,455	4,459,118	5,170,051	5,438,164	5,819,444	6,023,264
[C] =[A - B]	Net Income (Loss)	(134,397)	32,788	540,965	264,511	(105,277)	54,382	86,427	59,768
[D]	Net Assets Released from Restriction								
[E]	Beginning Fund Balance	804,468	670,071	702,859	1,243,824	1,508,335	1,403,058	1,457,440	1,543,867
[F]	Adjustment to Beg. Fund Balance		-	-	-	-	-	-	
[G] = [(E+F)+(C+D)]	Total Net Assets, End of Year	$ 670,071	$ 702,859	$ 1,243,824	$ 1,508,335	$ 1,403,058	$ 1,457,440	$ 1,543,867	1,603,635
[H] = [G/B]	Fund Balance %	21%	21%	35%	34%	27%	27%	27%	27%

1. Source of Data: Audited Financial Reports for FY 2018-19 - 2024-25. FY 2025-26 data is based on Unaudited Actuals
Row[C] is a change in net assets without donor restrictions

Object 15B: Sunrise Summary of Annual Audit Reports

Sunrise Middle School: Summary of Annual Audit Reports				
Fiscal Year	Auditing Firm	Opinion	Findings	Description
FY2022-23	Clifton Larson Allen LLP	Unmodified	Yes	After School Education & Safety (ASES) Program Sign in/Sign out
FY2023-24	Clifton Larson Allen LLP	Unmodified	No	None
FY 2024-25	Clifton Larson Allen LLP	Unmodified	No	None
FY 2025-26	Report due January 31, 2027			

As reflected in Object 15B above, Sunrise received an unmodified audit opinion for each completed year presented. The 2022-23 audit identified a finding related to the After School Education and Safety (ASES) program. Specifically, student sign-in and sign-out sheets did not include documentation supporting the early release of students who left the program before 5.45 p.m. The findings were not repeated in the FY 2023-24 or FY 2024-25 audits, both of which contained unmodified opinions with no findings. The FY 2025-26 audit report is due by January 31, 2027.

Demographic Data

In accordance with Education Code Section 47607(d)(1)(B) and (C), SCCOE requested, received from CDE, and reviewed aggregate data reflecting pupil enrollment patterns and test score patterns at Sunrise, as well as other demographic data from CDE through the CDE website.

In Objects 16 and 17, a comparison of the average Distance from Standard (DFS) academic assessment scores is made between students who left Sunrise and the students remaining at Sunrise. Object 14 reviews the average DFS for students who left after Census Day, and Object 15 reviews the data for the students who left Sunrise at the end of the year and did not return but could have for the following school year. This does not include students who would age out of the school. Based on the aggregate data from CDE, students who leave Sunrise are not students who appear to have been counseled out based on lower academic performance, as the average DFS in academic assessments for students leaving Sunrise or not returning to Sunrise are higher than or comparable to the students remaining at Sunrise. Further, there was no Dashboard data in 2020-21 or 2021-22 due to the

cancelation of statewide testing because of COVID-19. The information in these fields is lagging data, meaning that while the academic year may be 2019-20, it is reviewing the assessment and enrollment data for the prior year of 2018-19.

Object 16: Comparison of Average DFS for Students Who Left Sunrise After Census Day and Sunrise DFS

Academic Year	Subject	Enrolled Beginning of Year but Not Enrolled Conclusion	Cumulative Enrollment	Percent Enrolled Beginning Not Enrolled Conclusion	Number of Students Tested who left Sunrise	DFS Average for Students who left Sunrise	DFS Average for Students Remaining at Sunrise
2019-20	**ELA**	22	290	7.59	7	9.43	-5.1
2019-20	**Math**	22	290	7.59	7	-61.43	-61.6
2022-23	**ELA**	33	346	9.54	13	-79.62	-36.1
2022-23	**Math**	33	346	9.54	13	-90.08	-71.3
2023-24	**ELA**	24	339	7.08	6	-80	-36.6
2023-24	**Math**	24	339	7.08	7	-98	-53.5
2024-25	**ELA**	23	319	7.21	9	-124.44	-56.6
2024-25	**Math**	23	319	7.21	9	-96.67	-63.4

**No data available for 2020-21 or 2021-22 due to COVID.*

Object 17: Comparison of Average DFS for Students Attended Sunrise for at Least 90 days and Did Not Return the Following Year and Sunrise DFS

Academic Year	Subject	Enrolled for 90 days in Prior Year but Not on Census Day of Current Year	Prior Year Cumulative Enrollment	Percent Enrolled for 90 days Prior Year but Not on Census Day	Number of Students Tested who left Sunrise	DFS Average for Students who left Sunrise	DFS Average for Students Remaining at Sunrise
2019-20	**ELA**	26	265	9.81	14	-54.43	-5.1
2019-20	**Math**	26	265	9.81	14	-80	-61.6
2022-23	**ELA**	31	322	9.63	21	31	-36.1
2022-23	**Math**	31	322	9.63	20	31	-71.3
2023-24	**ELA**	35	346	10.12	20	-119.5	-36.6
2023-24	**Math**	35	346	10.12	20	-112	-53.5
2024-25	**ELA**	21	339	6.19	13	-46.85	-56.6
2024-25	**Math**	21	339	6.19	12	-72.42	-63.4

**No data available for 2020-21 or 2021-22 due to COVID.*

REVIEW OF THE CHARTER PETITION

SCCOE CSD Staff reviewed the renewal Petition using the criteria established in California Education Code Sections 47605(c), 47607, and 47607.2, consistent with County Board Policy 0420.4 (c) and found the following:

1. Sound Education Program

The Sunrise Renewal Petition presented a research based educational program that substantially meets all the required elements of a sound educational program. Lessons are prepared with both content and language objectives and grade levels incorporate Kagan engagement strategies to support student participation in their learning. Using a multi-tiered system of support (MTSS) model, classrooms incorporate blended learning, adaptive technology, and common core state standards to meet the needs of all students. Students and teachers showed enthusiasm for cross-curricular coordination to go deeper into concepts and develop language skills across content areas. Sunrise further incorporates iSCOPE as its character education program. iSCOPE stands for – Integrity, Self-control, Curiosity, Optimism, Perseverance, and Empathy.

The school supports its teachers with a wide range of professional development opportunities to deepen their practice as educators. In addition, resources are allocated to support rich learning experiences for students outside of the classroom with outdoor educational opportunities, meditation, university trips, peer mediation, 20-day challenges, and the addition of a social justice focused enrichment curriculum.

Charter School Department Staff believe that the renewal Charter includes a reasonably comprehensive and sound description of the education program which is consistent with sound educational practices.

Students Performing Below Grade Level:

The Renewal Petition describes Sunrise's Response to Intervention Program and uses an evidence-based, MTSS model of response, including intersession, afterschool programing, and summer school. Embedded within the program are strategies providing individual and small group support within the instructional day to provide more focused instruction for struggling students. Students also are referred to "office hours" for extra help from their core teachers after school and are strongly encouraged to join the school's after school program where they can receive extra tutoring and homework help. Sunrise has also implemented the schoolwide intervention and enrichment program or "Power Hour," a daily instructional block embedded within the master schedule to provide targeted intervention, language development, acceleration, and enrichment opportunities for all students.

Special Education:

Sunrise has 17% of its students identified as eligible for special education services. All these students are eligible under the mild-moderate range, as follows:

Object 18: 2025-26 Types of Disabilities Served by Sunrise

Type of Disability	Percentage
Specific Learning Disability (SLD)	64.7%
Speech or Language Impairment (SLI) only	7.8%
Autism	5.8%
Hard of Hearing (H/H)	0.0%
Other Health Impairment (OHI)	9.8%
SLI with a secondary disability	27.4%

Data supplied by Sunrise

The students are fully integrated into the general education environment and are supported by a full-time credentialed special education teacher, with services provided within small group push-in or pull-

out programs. Sunrise serves as its' own Local Education Area (LEA) for special education purposes and is part of the El Dorado Special Education Local Planning Area (SELPA). Special education staff are provided with professional development and support from SELPA. CSD Staff reached out to El Dorado SELPA which stated that Sunrise is in good standing with the SELPA, however several fiscal reports were either late or never submitted. CSD suggests a plan to be created to ensure SELPA reports are submitted timely.

Object 19: 2025-26 Special Education Enrollment by Program Setting for Sunrise and Comparison Schools and District and State

	Sunrise	SJUSD	Hoover	Muwekma Ohlone	ACE Inspire	State
Special Education Enrollment	56	3,588	158	79	37	883,862
Regular Class 80% or More of the Day	58.9%	61.6%	74.1%	65.8%	100%	60.9%
Regular Class 40-79% of the Day	35.7%	13.1%	17.1%	26.6%	0.0%	14.0%
Regular Class 39% or Less of the Day	5.4%	16.2%	8.9%	7.6%	0.0%	16.5%
Separate School & Other Settings	0.0%	3.1%	0.0%	0.0%	0.0%	2.5%
Preschool Setting	0.0%	5.9%	0.0%	0.0%	0.0%	6.1%
Missing/Unknown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Data gathered from Dataquest: https://data1.cde.ca.gov

English Learners (EL):

Sunrise has 38.2% of its student population identified as English Learners (EL or ELL). Eligible students enrolled receive appropriate English Learner services in accordance with federal and state law. To ensure that ELLs meet state standards in academics, all Sunrise teachers serving ELs are appropriately credentialed and are trained in pedagogical strategies that scaffold both content and language skills. All teachers have received training, either directly or from teacher mentors, who have been trained from the Santa Clara County Office of Education's ELA/English Language Development (ELD) trainings and from Dr. Kate Kinsella's Workshops on tools to prepare English Learners.

Educational Leadership

The Director/Principal, Assistant to the Director and the Assistant Principal are the educational and instructional leaders at Sunrise and are explicitly the leaders of educational programming and leads development of educational program improvement, in addition to being responsible for teacher supervision, evaluation, and providing input and approval of each faculty and staff member's Goals. The Director/Principal position states that this individual must meet all the following minimum requirements: "Bachelor's degree required; advanced degree, administrative credential and administrative experience preferred." Similar language is included for the Assistant to the Director. The Assistant Principal position minimum qualifications include: "Valid California teaching credential and, preferably, an administrative credential." At the end of the three administrative positions, the petition states: "At least one of the above three administrators will have an administrative credential." The job duties assigned to these administrative positions are consistent with the need for at least a valid California teaching credential, if

not an administrative credential. This is particularly true considering the mandate that all charter schoolteachers now hold the Commission on Teacher Credentialing certificate, permit, or other documents required for the teacher's certificated assignment. Sunrise's Director and the Assistant to the Director should also meet this requirement applicable to the teachers they train, supervise, and evaluate. The lack of a California teaching credential for a person holding the Director or Assistant to the Director position could negatively impact the quality of educational services provided to Sunrise students, and requiring teaching credentials is consistent with the County Board of Education's expressed expectations for charter schools under its oversight to help ensure a sound educational program. Additionally, if Sunrise administrators "cover" classes for teachers when a substitute is not available, they are required to hold a teaching credential, or at least a substitute credential. While the Director/Principal does hold a valid California Pupil Services Credential, the Assistant to the Director holds both a valid California Teaching Credential and a valid California Administrative Services Credential. CSD Staff recommends including "valid California administrative credential" as part of the requirement for the administrative team.

The Charter Schools Department Staff concluded the Sunrise Renewal Petition provides sufficient information to substantiate the required elements for a sound educational program, so long as "valid California" is added to the administrative credential language for the administrative team and a plan is created to address the late or non-submissions to SELPA as part of an addendum to the MOU.

2. Ability to successfully implement the program set forth in the Petition

Staff found facts demonstrating the Petitioners are likely to successfully implement the program only if Sunrise resolves the other identified concerns and conditions through the MOU and/or an addendum thereto, as described more fully throughout this Staff Analysis and Findings of Fact.

3. Affirmation of each of the conditions required by statute

SCCOE Staff found the Petition contains the required affirmations.

4. Reasonably comprehensive description of the required elements

For the description of each element to be considered "reasonably comprehensive," it is not enough for the Renewal Petition to include a description, but, rather, the description should be acceptable to SCCOE and be consistent with and not contrary to SCCOE's standards and expectations for charter schools under its oversight. SCCOE's indication that the description of an element is "reasonably comprehensive" should not be interpreted to mean SCCOE does not believe additional or different terms relating to an element would need to be agreed to by the Petitioner through the MOU and/or an addendum thereto. Further, while SCCOE may make recommendations for remediation in an area or specify issues or terms that have been or will need to be clarified or resolved through the MOU and/or an addendum thereto, this does not mean other areas may not need additional correction to be included in that MOU and/or in an addendum thereto. Further, the staff's determination of an element as reasonably comprehensive may be premised on noted issues being remediated through that MOU and addendum process.

Effective July 1, 2026, Financial Audit was removed as a required charter element, and, instead, the requirements regarding how charter schools will conduct are now enumerated in law through AB 126 or the trailer bill language and AB 2647 and codified in Education Code Section 41020. As part of the charter assurances, Sunrise has committed to complying with the new financial audit requirements, which are also addressed through provisions of the 2026 MOU.

The Charter Schools Department Staff found, as detailed below, that additional specificity and requirements governing Sunrise's educational program, governance, and operations, including its compliance with the required charter elements, will need to be addressed through the MOU and/or an addendum thereto. It is necessary to CSD Staff's determination that the description of an element is reasonably comprehensive that the parties enter into the MOU and/or an addendum thereto to address current requirements and best practices (including those updated/addressed by the 2026 MOU). That expectation informs and should be interpreted as applicable to the analysis of whether the Renewal Petition includes a reasonably comprehensive description of each element and the analysis and recommendations regarding the MOU and/or an addendum thereto informing, supplementing, and or being required in order for the description of each element to be reasonably comprehensive.

In preparing the Renewal Petition, Sunrise appears to have overlooked some updates. This Staff Analysis will not detail each of these omissions and concerns, but SCCOE Staff recommend that the SCCBOE, as a condition of renewal, require Sunrise to address these corrections, oversights, and omissions.

A. Element One: *Description of the Educational Program/Plan for Student Academic Achievement*

The above discussion of whether the educational program is sound is incorporated herein by this reference. Staff concluded that Sunrise provided sufficient information in the renewal Petition to substantiate all the required elements for a sound educational program so long as "valid California" is added to the required section for the administrative team and a plan is created to ensure that SELPA reports are timely filed.

The Charter Schools Department Staff believe that this section of the Petition includes a reasonably comprehensive description, so long as the issues in this section are addressed in the addendum to the MOU.

B. Element Two: *Measurable Student Outcomes*

Sunrise's student outcomes are tied to both state and school-specific priorities, with a focus on academic achievement, student safety, attendance, and campus climate. Key outcomes include meeting or exceeding CAASPP standards in English Language Arts, mathematics, and science, as well as goals for student growth in reading and English Language proficiency. These outcomes align with the Eight State Priorities required by California's Local Control and Accountability Plan (LCAP), ensuring that the school addresses core areas like academic achievement, student engagement, and school climate. Some outcomes, such as CAASPP performance and growth metrics in reading, are associated with specific years and must be updated annually to reflect new targets. Another area of focus for Sunrise is chronic absenteeism.

Sunrise's Renewal Petition affirms that these outcomes cover a broad range of student skills, from academic performance to social-emotional well-being. In the Renewal Petition, Sunrise commits to continually updating its goals and performance expectations to reflect the evolving needs of students and state requirements.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description.

C. Element Three: *Method by Which Pupil Progress in Meeting Outcomes will be Measured*

To measure the student outcomes listed in Element B, Sunrise utilizes several standardized assessments. These include the Smarter Balanced Assessments for English Language Arts, Mathematics, and Science, and the California Standards Test for Science for fifth and eighth graders. English Learners are assessed annually through the English Language Proficiency Assessments for California (ELPAC).

Assessment data is integral to driving instruction at Sunrise. Teachers frequently analyze individual and class-level performance to identify patterns, areas of strength, and students in need of additional support. Data dashboards help streamline this process by providing real-time insights, allowing teachers and school leaders to make informed decisions that enhance student achievement. This data is shared with educational partners, including parents, through progress reports and conferences, and with the chartering authority and other relevant entities through formal reports.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description.

D. Element Four: *Governance Structure*

In accordance with Education Code section 47604, Escuela Xochitl Tonatiuh, Inc., dba Sunrise Middle School is operated as a California non-profit public benefit 501(c)(3) corporation. All staff will be employees of Sunrise Middle School. Sunrise is governed by a Board of Directors ('the Board") pursuant to its corporate bylaws as adopted, and as subsequently amended from time to time, which shall be consistent with this charter. Board meetings are held in accordance with Brown Act.

Interviews with the parents, as part of the annual visit, confirm their active participation and their willingness to lend their voice to the Board regarding the uniqueness of their school. Sunrise has established an English Language Advisory Committee (ELAC) which meets monthly throughout the year. Parents also participate in the School Site Council (SSC). In addition, there are a variety of ways that allow more informal opportunities for parents to interact and engage with Sunrise staff, i.e., tutoring, homework center, parenting classes, parent workshops, etc. The Renewal Petition specifies that Sunrise shall comply with the Brown Act, the Political Reform Act of 1974, and Government Code Section 1090 et seq., and provide annual training on these topics. No interested persons may serve on the Sunrise Board.

The Renewal Petition states the Board will comply with all federal, state, and local laws applicable to independent public charter schools and the Board has adopted a Conflict of Interest (COI) Code that has been approved by the Santa Clara County Board of Supervisors.

In accordance with the Political Reform Act and the COI Code, all Sunrise Board members, as well as the designated Sunrise leadership, are required to file a "Form 700" Statement of Economic Interests annually disclosing specified interests. During the charter term, SCCOE staff have reviewed the Forms 700 filed on behalf of Sunrise reporters and found that directors or staff have identified reportable interests as required.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description.

E. Element Five: *Employee Qualifications*

The Renewal Petition states that Sunrise recruits professional, effective, and qualified personnel for all administrative, instructional support, and non-instructional support capacities who believe in the instructional philosophy outlined in its vision statement. In accordance with Education Code 47605(b)(5)(e), Sunrise shall be nonsectarian in its employment practices and all other operations. Sunrise shall not discriminate against any individual (employee or student) on the basis of the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics).

As stated in the education program section, "valid California" should be added to the administrative team requirement of having an administrative credential. Should any member of the team "cover" a classroom, that member of the team would need to have a valid California teaching credential or permit, as well.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description on the condition that the qualifications for the director/principal, assistant to the director, and assistant principal positions be updated through the addendum thereto and that the addendum thereto specifically incorporate "valid California" into the descriptions regarding preferred credentials.

F. Element Six: *Health and Safety*

The Renewal Petition specifies that Sunrise maintains and regularly reviews and updates Board-approved policies and procedures to ensure the health and safety of students and staff. Sunrise provided an overview of Health and Safety Policies and Procedures and the process for employee fingerprinting and background checks. All staff are expected to comply with Ed. Code 47605(c)(5)(f), Education Code Section 44691, and all other legal requirements, and Sunrise states it is committed to providing a safe, compliant working environment. Sunrise submitted its 2025-26 Comprehensive School Safety Plan and declared that Sunrise will review and update the plan by March 1 of every year and that the plan shall include the required safety topics. The Renewal Petition specifies that its Employee Handbook, School Safety Plan, and Student/Parent Handbook are all reviewed, updated, and presented to the Sunrise Board annually for approval to ensure ongoing compliance with state and federal laws and regulations. Sunrise has updated its description of health and safety policies and procedures to address some changes and new requirements of law that have gone into effect since its Charter was last renewed. The 2026 MOU also includes a variety of health and safety and related compliance commitments that Sunrise has committed that it will meet per the MOU.

The Charter Schools Department Staff believe this section, including the supplementation provided by the MOU and/or an addendum thereto, includes a reasonably comprehensive description.

G. Element Seven: ***Racial, Ethnic, English Learner, and Special Education Balance***

On July 1, 2020, AB 1505 took effect, updating Element G to require schools to provide a reasonably comprehensive description of how the school will achieve a balance of racial and ethnic pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils, reflective of the general population residing within the territorial jurisdiction of the district to which the Sunrise charter was initially submitted, which, as previously established, is SJUSD. Sunrise's Renewal Petition has been updated consistently with these revised requirements.

Object 20, below, demonstrates that Sunrise's student demographic distribution is not largely reflective of the surrounding San Jose Unified School District (SJUSD) nor the schools that Sunrise students would otherwise have attended. The Hispanic or Latino population at Sunrise is 90.3%, substantially higher than the 54% at SJUSD, and the Asian population is somewhat lower at Sunrise (2.7%) compared to SJUSD (14.5%). Sunrise is specifically serving a traditionally underserved population, which correlates with the intent of the Charter School Act.

Object 21, below, highlights differences in student group populations between Sunrise, SJUSD, and the schools Sunrise students would otherwise have attended. Notably, Sunrise has a higher percentage of ELs at 38.2% compared to 22.3% in SJUSD, and comparable percentages compared to other comparison schools, but lower than ACE Inspire (60.4%). Sunrise's SWD population is higher at 17% compared to 14.5% in SJUSD and comparable to the comparison schools. The SED population at Sunrise, at 85.8%, is significantly higher than SJUSD's 41.9%, and higher than Hoover (59.8%) and Muwekma Ohlone (68.9%), but less than ACE Inspire (90.4%).

Object 20: Comparison of 2025-26 Demographic Data Among Sunrise, SJUSD, and Schools Sunrise Students Would Otherwise Have Attended

	Hispanic or Latino	Asian	Filipino	White	African American	Two or More Races
Sunrise	90.3%	2.7%	0.0%	3.0%	0.9%	0.6%
SJUSD	54.0%	14.5%	2.0%	19.7%	2.1%	7.3%
Hoover	77.6%	3.3%	1.7%	9.6%	3.2%	4.1%
Muwekma Ohlone	83.3%	4.4%	2.1%	6.0%	1.2%	2.0%
ACE Inspire	96.1%	1.3%	1.3%	0.0%	0.0%	1.3%

Data gathered from Dataquest: https://data1.cde.ca.gov

Object 21: Comparison of 2025-26 Student Group Data Among Sunrise, SJUSD, and Schools Sunrise Students Would Otherwise Have Attended

	Total Number of Students	Percentage of SED	Percentage of EL	Percentage of SWD
Sunrise	330	85.8%	38.2%	17.0%
SJUSD	24,311	41.9%	22.3%	14.5%
Hoover	903	59.8%	33.6%	17.5%
Muwekma Ohlone	563	68.9%	35.0%	14.0%
ACE Inspire	230	90.4%	60.4%	16.1%

Data gathered from Dataquest: https://data1.cde.ca.gov

Sunrise's recruitment plan outlines broad strategies to attract a student population reflective of SJUSD. The plan includes both outreach and admissions practices designed to ensure diversity in racial, ethnic, and special student populations. Recruitment materials are printed in multiple languages to accommodate the linguistic diversity of the community, and partnerships are formed with local organizations that serve diverse populations. A key focus of Sunrise's recruitment is on person-to-person engagement, including holding focus groups with parents and community organizations, distributing promotional materials, conducting community events at various times, cultivating relationships with local community members, and employing staff from the local area to lead recruitment efforts.

Object 22: Sunrise Demographic Data from 2017-18 to 2025-26

	Total Number of Students	Hispanic or Latino %	Asian %	Filipino %	White %	African American %	Two or More Races %
2017-18	210	90.0%	2.9%	0.0%	1.0%	0.0%	0.0%
2018-19	243	89.7%	1.2%	0.0%	0.8%	0.4%	0.0%
2019-20	267	91.0%	0.4%	0.7%	0.4%	1.1%	0.0%
2020-21	260	91.5%	2.3%	0.8%	2.3%	1.5%	0.4%
2021-22	289	91.7%	3.1%	1.4%	2.1%	0.7%	0.7%
2022-23	308	94.2%	3.6%	0.6%	0.3%	0.3%	0.6%
2023-24	312	91.7%	3.8%	1.0%	2.2%	0.0%	0.6%
2024-25	301	88.7%	2.7%	0.3%	3.7%	0.0%	0.3%
2025-26	330	90.3%	2.7%	0.0%	3.0%	0.9%	0.6%

Data gathered from Dataquest: https://data1.cde.ca.gov

Object 23: Sunrise Student Group Data from 2017-18 to 2025-26

	Total Number of Students	Percentage of SED	Percentage of EL	Percentage of SWD
2017-18	210	88.6%	45.2%	12.9%
2018-19	243	92.2%	46.9%	12.3%
2019-20	267	91.4%	54.3%	12.4%
2020-21	260	92.3%	51.2%	13.5%
2021-22	289	87.5%	50.2%	12.1%
2022-23	308	85.4%	42.2%	13.0%
2023-24	312	89.7%	38.8%	12.5%
2024-25	301	89.7%	42.2%	14.3%
2025-26	330	85.8%	38.2%	17.0%

Data gathered from Dataquest: https://data1.cde.ca.gov

Object 22, above, shows that Sunrise's racial and ethnic demographic composition has remained relatively stable from 2017-18 to 2025-26, particularly for the Hispanic or Latino population, which consistently represents most students. The Hispanic or Latino percentage has ranged from 88% to 94%, with the most recent year (2025-26) showing 90.3%. The other demographic groups vary from year to year as various families move in and out of the school.

Object 23, above, indicates that the EL population at Sunrise has fluctuated over the years with a range of 38.2% to 54.3%; currently EL is 38.2%. The percentage of SWD has also fluctuated, with a range of 12.1% to 17%; currently, SWD is 17%. The percentage of SED students fluctuated, staying between 85.4% and 92.3%, with a current level of 85.8%. These data points reflect a

consistently high-need student population, particularly in terms of SED and EL students, which comports with the intent and purposes of the Charter Schools Act.

The Charter specifies that Sunrise will "document its outreach efforts and analyze the information to evaluate whether we have met our enrollment targets" and "utilize this information to refine its outreach efforts to ensure that the Sunrise student body reflects the general population of the district with regard to racial and ethnic, EL students, and students with disabilities balance."

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description.

H. Element Eight: *Admissions Policies and Procedures*

Sunrise says it has articulated student admission policies and procedures. The school is nonsectarian, tuition free, and does not discriminate against any pupil based on protected characteristics.

With the changes to the Charter Schools Act since Sunrise's most recent renewal, the actual policies and procedures for admission – including how Sunrise implements the admission preferences, conducts the public random drawing (lottery) admission procedures, adds students to the waitlist, and offers them admission from the waitlist – must also be included in the Renewal Petition. Sunrise has updated the Renewal Petition to include these items.

Admission to the school is not determined by the place of residence of pupils or parents, except in the case of public random drawing, as allowed by law.

The Renewal Petition requests the County Board approval of revised and additional admission preferences in cases in which there are more applicants than spaces at a particular grade level. Currently enrolled students are guaranteed admission in the following school year and are not subject to the lottery. Sunrise is seeking approval of the following preferences in the following order:

1. Siblings of students admitted to or attending the Charter School
2. Children of Charter School Employees (not to exceed 10% of total enrollment)
3. Students residing within the District (A drawing will be held for District residents before holding a drawing for students outside the District.)
4. All other applicants

The previously approved preferences that are currently in effect are:

1. Siblings of enrolled students (exempt)
2. Children of charter school teachers and staff (up to 10% of total enrollment; exempt)
3. Residents of the District
4. All other applicants

The revisions to provide for admissions preferences rather than exemptions (other than for current students who are guaranteed ongoing enrollment and are, thus, exempt from the lottery

process), as previously provided, are appropriate. Sunrise has not specified its reason(s) for seeking the revised preferences, whether to approve any or all the requested preferences, other than the preference for residents of SJUSD, is within the discretion of the SCCBOE, per *EC* Section 47605(e)(2)(B). It is unclear why the residents of the district preference needed to include language regarding holding a drawing for residents of the district before students outside of the district as those students are part of preference 4 and therefore redundant. If the County Board does not approve all the preferences, Sunrise will be required to revise this provision of the Charter and its admission policies and procedures accordingly.

Sunrise currently has as its first preference siblings of students who are currently enrolled at Sunrise. The new preferences proposed by Sunrise seek to expand the sibling preference to include not only students who are currently enrolled, but students whose siblings are admitted during the lottery. In other words, as currently authorized by SCCBOE, if a student who is attending Sunrise in 2026-27 has a sibling apply during the open enrollment process for admission for 2027-28 that student would be eligible for a sibling preference. As proposed in the Renewal Petition, that preference would continue to apply, but, additionally, if two siblings who do not attend Sunrise in 2026-27 both apply for admission for 2027-28, immediately upon one of those siblings receiving a place through the lottery, the other sibling would automatically be entitled to an admission preference even though neither of the siblings are current Sunrise students. The Renewal Petition does not, however, explain the specifics of how the admitted sibling preference would be implemented in practice, particularly if a sibling is drawn in the lottery after their sibling in a lower grade was placed on the waitlist rather than offered admission. CSD Staff recognizes the benefits of allowing families to enroll all of their children at the same school, so recommends the SCCBOE approve the preferences as proposed by Sunrise, including the addition of the preference for siblings of students who are admitted to Sunrise, with the proviso that the preference for siblings of students who are "admitted" to (as opposed to already enrolled in) Sunrise only be permitted if Sunrise is able to detail through the MOU and/or an addendum thereto, to the County Superintendent or designee's satisfaction, specifically the process of how it would be applied in practice – and ensuring that it is only a preference, not an exemption from the lottery – including if one sibling is admitted during the lottery and another sibling(s) is participating in the same lottery.

This element of the Charter is also supplemented by the provisions of the current MOU and/or the 2026 MOU addressing the permissible contents of the application for admission, which continue to be necessary to Sunrise's operations. Sunrise has also updated this provision of the Charter to reflect changes to the law since its Charter was last renewed.

CSD Staff recommends that it be clarified though the MOU and/or an addendum thereto that students in a capped preference group shall be included in the public drawing and, if necessary, placed on the waitlist, both within that capped preference group and within the next highest noncapped lower-level preference group for which the student also qualifies so their opportunity for admission is not limited by the cap on a higher level preference group. Additionally, it should be clarified through the MOU and/or an addendum thereto that in no event shall a student who submitted their application after the close of the Open Enrollment Period and did not participate in the public random drawing be offered admission or placed on a waitlist above any student who participated in the public random drawing for admission, regardless of whether the applicant would or would not qualify for one of the admission preferences granted during the Open Enrollment Period and public random drawing. In the case of openings after the initial offers of admission at the time of the public random drawing, students shall be offered admission

in strict accordance with their position on the wait list as established during the public random drawing and students shall not be moved up or down on the waitlist once placed thereon other than as a result of applicants ahead of them on the waitlist being offered admission or withdrawing from the waitlist.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description only if, through the MOU and/or an addendum thereto, the public random drawing procedures and preferences are clarified, as described above.

I. Element Nine: *Pupil Suspension and Expulsion*

Sunrise's Renewal Petition includes its comprehensive suspension and expulsion policies and procedures that have generally been updated to reflect current law. The Charter Schools Act requires the Charter to provide a reasonably comprehensive description of the procedures for suspension and expulsion from Sunrise. As such, Sunrise may not substantively revise the causes or procedures, except to comport with requirements of law or to track revisions to the causes and procedures applicable to non-charter California public schools, without a determination from the County Superintendent or designee whether the proposed revision(s) is a material revision to the Renewal Petition. The statement in the Renewal Petition to the contrary, claiming authority for Sunrise unilaterally to amend these policies and procedures, is incorrect and Sunrise should be required, as a condition of approval to acknowledge through the MOU and/or addendum thereto the need to obtain a determination from the County Superintendent or designee whether any proposed revision(s) are material.

These policies and procedures are generally consistent with SCCOE's expectations for best practices and with the changes to this portion of the Charter Schools Act.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description, only if the above issue is clarified and corrected through the MOU and/or an addendum thereto.

J. Element Ten: *Employee Retirement System*

The Sunrise Renewal Petition states all eligible certificated employees of Sunrise may participate in the State Teachers Retirement System (STRS) (but does not specify the retirement system for certificated employees who are not eligible to participate in STRS), and non-certificated employees will participate in the federal social security system. The Renewal Petition also states that non-certificated employees may also participate in the Sunrise-sponsored 403(b) retirement program. Sunrise's Director or designee ensures that appropriate arrangements for each employee are available.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description with the addition through the MOU and/or an addendum thereto of information about the retirement system option for certificated employees who are not eligible to participate in STRS.

K. Element Eleven: *Public School Attendance Alternatives*

SJUSD resident students who choose not to attend Sunrise may attend other SJUSD schools or pursue an intra- or inter-district transfer in accordance with existing district enrollment and transfer policies. Parents and guardians of each student enrolled in Sunrise will be informed

their students have no right to admission to a particular school of any local education agency as a consequence of enrollment in Sunrise, except to the extent such a right is extended by the local education agency.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description.

L. Element Twelve: *Description of the Rights of An Employee of the County Superintendent of Schools, Upon Leaving the Employment of the County Superintendent of Schools, to be Employed by the Charter School*

The Sunrise Renewal Petition addresses the return rights of employees of the "San Jose Unified or the Santa Clara County Office of Education" in accordance with applicable law. However, SCCOE employees are employees of the "Santa Clara County Superintendent of Schools." This will need to be clarified in the MOU and/or addendum thereto.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description, but it must be updated through the MOU and/or addendum thereto to reflect the Santa Clara County Superintendent of Schools as the employer of personnel at SCCOE.

M. Element Thirteen: *Dispute Resolution*

As part of the 2019 MOU, new dispute resolution language was established which was reasonably comprehensive. However, Sunrise failed to incorporate this language in the renewal petition. On September 14, 2026, Sunrise agreed to the Dispute Resolution language in the 2026 MOU, which includes the provisions covering violations of the Charter, an MOU with SCCOE, or law, a problem related to the operation of Sunrise or the SCCOE's oversight obligations, or any dispute arising between SCCOE and the Charter.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description, as amended through the 2026 MOU.

N. Element Fourteen: *Closure Protocol*

Sunrise outlines a process to be used if the charter school closes. CSD staff notes that Sunrise has already agreed to the closure protocol language from the 2026 MOU which reflects SCCOE's best practices.

The Charter Schools Department Staff believe this section includes a reasonably comprehensive description, as amended through the 2026 MOU.

Required Supplemental Information

CSD staff reviewed the Sunrise Middle School Renewal Petition, including its budget narrative, projected budget, and cash flow for fiscal years (FY) 2026–27 through 2031–32. Staff also reviewed supplemental documents and information presented at the public hearing to assess and clarify Sunrise's financial position. Supplemental materials reviewed included financial audits, monthly financial statements, state-required financial reports, annual visit documents, and the Fiscal Crisis and Management Assistance Team (FCMAT) Local Control Funding Formula

(LCFF) Calculator. Staff used the FCMAT calculator to independently recalculate the LCFF revenue reported in the Renewal Petition.

Enrollment & Average Daily Attendance (ADA)

Objects 24A and 24B below present Sunrise's historical and projected enrollment and Average Daily Attendance (ADA). Historical enrollment increased from 243 students in FY 2018–19 to a high of 330 students in FY 2025–26, representing an increase of 87 students, or approximately 36%, over the historical period. Enrollment fluctuated from year to year, including slight declines in FY 2020–21 and FY 2024–25. However, the overall trend was positive, with enrollment increasing from 301 students in FY 2024–25 to 330 students in FY 2025–26.

Sunrise's ADA generally followed its enrollment trend, increasing from 232.56 in FY 2018–19 to 303.87 in FY 2025–26. The school's ADA rate ranged from 88% to 97% during the historical period. After declining to 88% in FY 2021–22, the ADA rate gradually improved, reaching approximately 92% in FY 2025–26.

For FY 2026–27, Sunrise's Adopted Budget projects enrollment of 320 students and ADA of 291.70, representing an ADA rate of approximately 91%. This enrollment assumption reflects a decrease of 10 students, or approximately 3%, from FY 2025–26. The Renewal Petition projects enrollment to remain at 320 students annually from FY 2027–28 through FY 2031–32, with corresponding ADA of approximately 291.74 based on a 91% ADA rate.

Sunrise serves students in Grades 5–8, with Grade 5 comprising a comparatively small portion of total enrollment. The petition's enrollment model assumes 20 students in Grade 5, 90 students in Grade 6, 100 students in Grade 7, and 110 students in Grade 8 throughout the renewal term. Under this structure, Grade 6 continues to serve as the school's primary entry point. Maintaining enrollment of 320 students will therefore depend on Sunrise's ability to recruit a sufficiently large incoming Grade 6 cohort each year and retain students as they progress through the upper grades.

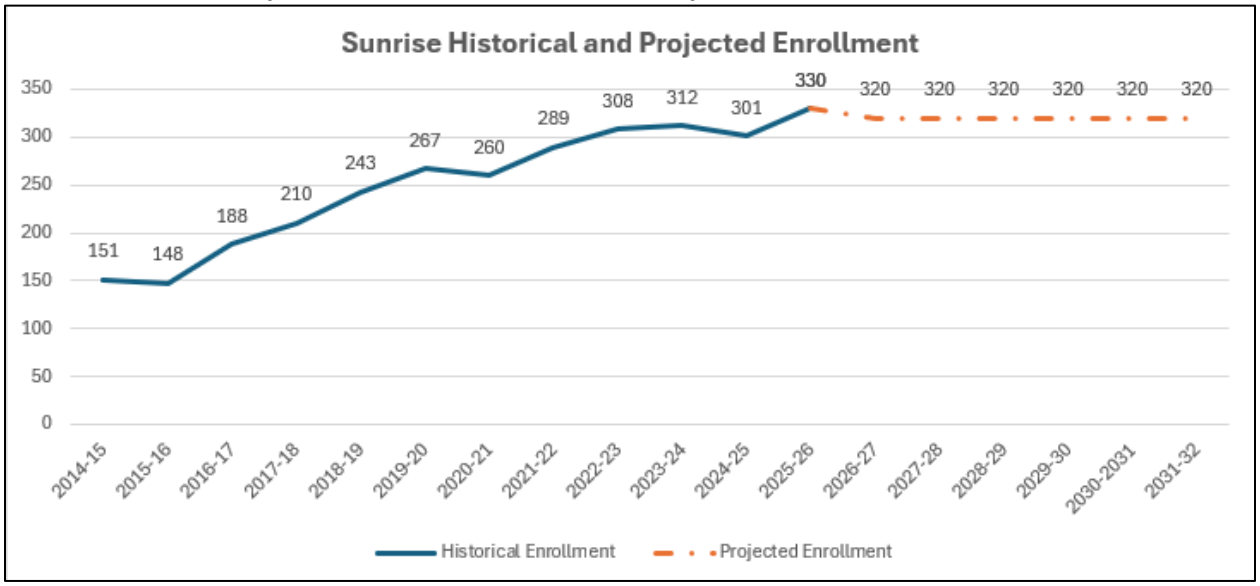
Overall, Sunrise's projected enrollment of 320 students is slightly below its FY 2025–26 enrollment of 330 students but above enrollment reported in all other historical years. The projected 91% ADA rate is slightly below the school's FY 2025–26 performance and is consistent with its recent historical experience. Accordingly, the enrollment and ADA projections appear reasonable, provided Sunrise maintains its anticipated Grade 6 enrollment and sustains attendance at the projected rate.

Object 24A: Sunrise Historical and Projected Enrollment and ADA

	Historical Data								Renewal Petition Projection					
	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
Grade 5	0	21	20	12	21	22	11	14	20	20	20	20	20	20
Grade 6	80	72	83	108	86	85	99	100	90	90	90	90	90	90
Grade 7	77	86	68	93	108	85	97	115	100	100	100	100	100	100
Grade 8	86	88	89	76	93	120	94	101	110	110	110	110	110	110
A. Actual Enrollment	243	267	260	289	308	312	301	330						
B. Projected Enrollment									320	320	320	320	320	320
C. Incr/(Decr) in Enrollment[2]	33	24	(7)	29	19	4	(11)	29	(10)	0	0	0	0	0
D. Enrollment Variance[3]	16%	10%	-3%	11%	7%	1%	-4%	10%	-3%	0%	0%	0%	0%	0%
E. Incr/(Decr) in Enrollment Variance[4]		-6%	-12%	14%	-5%	-5%	-5%	13%	-13%	3%	0%	0%	0%	0%
F. ADA	232.56	251.86	251.86	255.44	274.93	285.34	272.76	303.87	291.70	291.74	291.74	291.74	291.74	291.74
G. ADA %[5]	96%	94%	97%	88%	89%	91%	91%	92%	91%	91%	91%	91%	91%	91%

[1] Historical enrollment data is based on Census Day enrollment and historical ADA is based on P2 ADA.
FY 2026-27 reflects Adopted Budget. FY 2027-28 through FY 2031-32 reflect projections included in the Renewal Petition.
[2] Current Year Enrollment minus Prior Year Enrollment
[3] Row C/Prior Year Enrollment
[4] Current Year Enrollment Variance - Prior Year Enrollment Variance (Row D)
[5] Row F/Row A or Row B

Object 24B: Sunrise Historical and Projected Enrollment



Revenues & Expenses

Sunrise's Charter Renewal Petition includes multiyear financial projections for FY 2026–27 through FY 2031–32. As reflected in the table above, Sunrise projects operating surpluses in each year of the proposed renewal term. Projected annual surpluses range from approximately $53,000 to $163,000.

Total revenues are projected to increase from approximately $5.64 million in FY 2026–27 to $5.88 million in FY 2028–29. Revenues are then projected to decrease modestly in FY 2029–30 and FY 2030–31 before increasing to approximately $5.82 million in FY 2031–32. Total expenditures follow a similar pattern, increasing from approximately $5.48 million in FY 2026–27 to $5.78 million in FY 2028–29, with modest fluctuations in the remaining years of the renewal term.

Based on these projections, Sunrise's ending fund balance is expected to increase from approximately $1.77 million in FY 2026–27 to approximately $2.20 million in FY 2031–32. The corresponding reserve percentage is projected to increase from 32% to 38% and remain well above the 4% reserve benchmark established in the Memorandum of Understanding with SCCOE throughout the renewal period.

Object 25: Sunrise Renewal Petition Multi-Year Projection Summary

		2026-27*	2027-28	2028-29	2029-30	2030-31	2031-32
[A]	Total Revenues	5,643,973	5,752,084	5,877,125	5,791,932	5,715,165	5,823,958
[B]	Total Expenses	5,480,998	5,635,729	5,775,651	5,688,901	5,662,086	5,768,797
[C] = [A - B]	Net Income (Loss)	162,976	116,355	101,474	103,031	53,079	55,162
[D]	Beginning Fund Balance	1,603,635	1,766,611	1,882,967	1,984,441	2,087,472	2,140,550
[E]	Adj. to Beg. Fund Balance	-	-	-	-	-	-
[F] = [(D+E) + C]	Total Net Assets, End of Year	$ 1,766,611	$ 1,882,967	$ 1,984,441	$ 2,087,472	$ 2,140,550	$ 2,195,712
[G] = [F/B]	Reserve Percentage	32%	33%	34%	37%	38%	38%

1. Source of Data for *FY 2026-27 (Current Year) Abopted Budget, FY 2027-28 - FY 2031-32 (Multi-Year) Sunrise Renewal Petition projections.

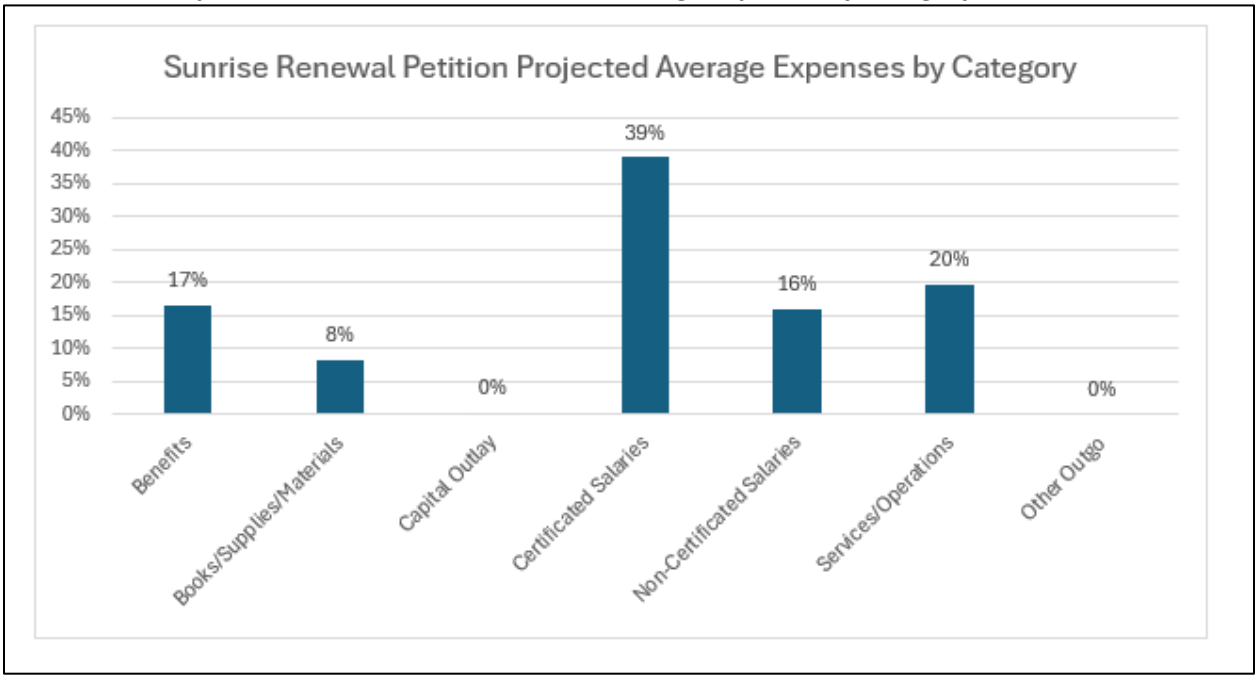
Sunrise Petition projects revenue across several categories, with Local Control Funding Formula (LCFF) sources remaining the key driver of revenue growth during the renewal term. LCFF revenue increases annually based on projected growth in the LCFF base grant and supplemental and concentration grant funding. During the renewal period, LCFF sources represent approximately 67% to 71% of total revenue, other state revenue represents approximately 15% to 18%, and federal revenue remains at approximately 7%-8%.

On the expenditure side, as reflected in Object 26, personnel-related costs represent approximately 72% of Sunrise's projected expenditures over the renewal term, consisting of 39% for certificated salaries, 16% for non-certificated salaries, and 17% for employee benefits. The remaining 28% consist primarily of services and operations at approximately 20% and books, supplies, and materials at approximately 8%. The projected expenditure distribution is generally consistent with Sunrise's historical spending patterns and appears reasonable based on prior-year results.

The projections demonstrate that Sunrise anticipates maintaining balanced operations, positive annual operating results, and adequate reserves throughout the proposed renewal term. However, the relatively modest projected surpluses in the later years provide less flexibility to absorb unanticipated revenue reductions or expenditure increases. Accordingly, Sunrise's ability to achieve these results will depend on the reasonableness of its underlying assumptions regarding enrollment, attendance, revenue, staffing, and expenditures.

SCCOE staff finds that the multiyear budget projections presented in the Charter Renewal Petition include a reasonably comprehensive description of anticipated revenues and expenditures and satisfactorily demonstrate Sunrise's ability to meet its projected financial obligations throughout the renewal term.

Object 26: Sunrise Renewal Petition Average Expenses by Category



Cash Flow

The Sunrise Middle School Charter Renewal Petition includes cash flow projections for FY 2026–27 through FY 2031–32. The projections include assumptions regarding the timing of cash receipts from major revenue sources. Based on these projections, Sunrise anticipates maintaining positive ending cash balances and sufficient liquidity to meet its financial obligations throughout the renewal term.

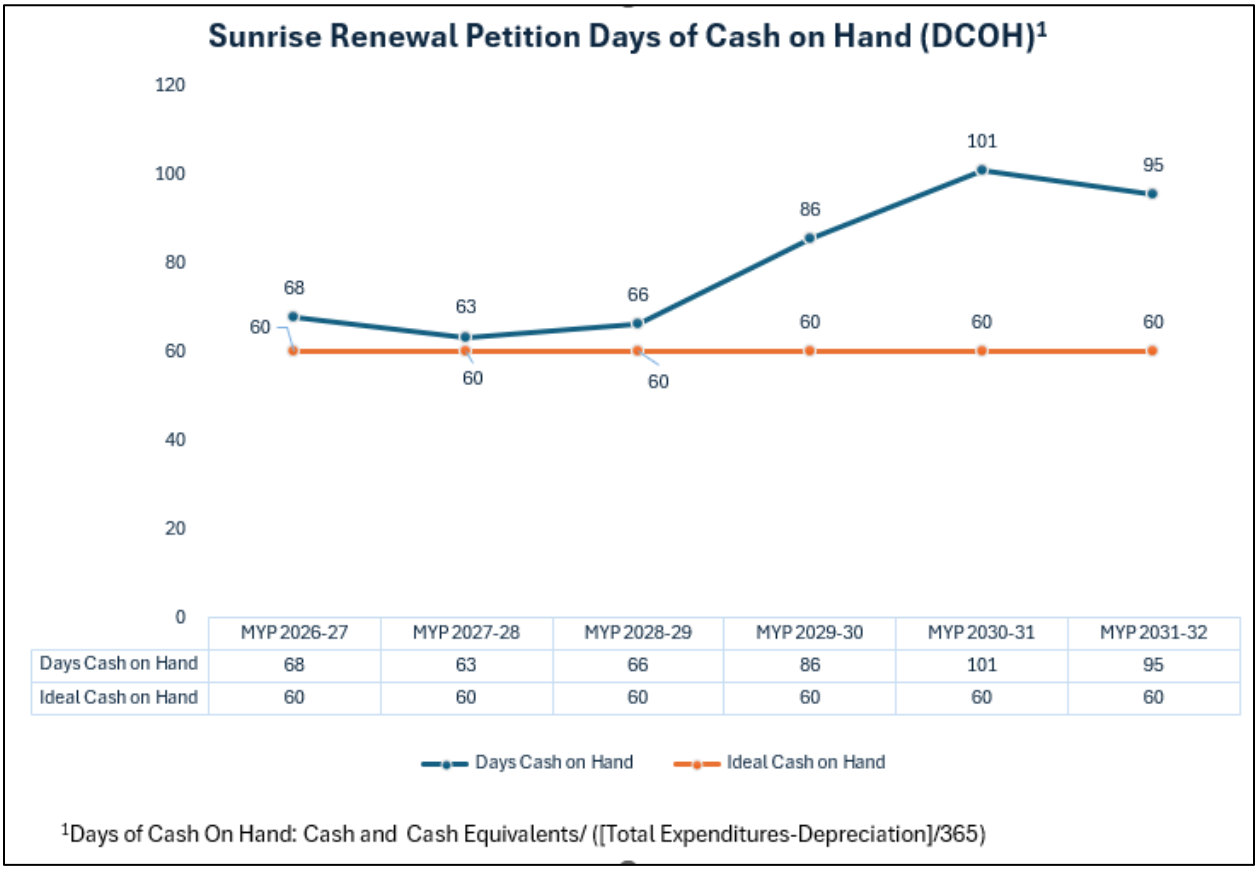
As reflected in Object 27, projected Days of Cash on Hand (DCOH) range from 63 to 101 days, remaining above SCCOE's 60-day benchmark in each year. DCOH is projected to decline from 68 days in FY 2026–27 to 63 days in FY 2027–28, then gradually increase to 101 days in FY 2030–31, ending at 95 days in FY 2031–32. Although projected cash remains above the benchmark, the relatively narrow margin during the early years of the renewal term warrants continued monitoring, particularly if revenues are delayed or expenditures exceed projections.

As shown in Object 28, Sunrise's historical cash position has generally strengthened. DCOH increased from 34 days in FY 2018–19, below SCCOE's benchmark, to 65 days in FY 2019–20. Since then, Sunrise has maintained cash above the 60-day benchmark, ranging from 64 to 149 days between FY 2020–21 and FY 2025–26. DCOH reached a high of 149 days in FY 2022–23, then declined to 88 days in FY 2024–25 and 84 days in FY 2025–26.

Sunrise's reported cash balance includes funds held in certificates of deposit. The availability of these funds may be subject to applicable maturity dates and early-withdrawal provisions. Sunrise also maintains a line of credit, and the information provided during the renewal fiscal capacity meeting indicates that no balance was outstanding as of June 30, 2026. Although the line of credit may provide short-term financial flexibility, it is not included in the DCOH calculation.

Overall, the historical and projected cash flow information demonstrates that Sunrise is expected to maintain adequate liquidity throughout the renewal term. However, because projected DCOH is relatively close to the 60-day benchmark during the first three years of the renewal term, Sunrise should continue to closely monitor its cash position and update its cash flow projections regularly to ensure sufficient liquidity to meet its ongoing financial obligations.

Object 27: Sunrise Renewal Petition Days of Cash on Hand (DCOH)

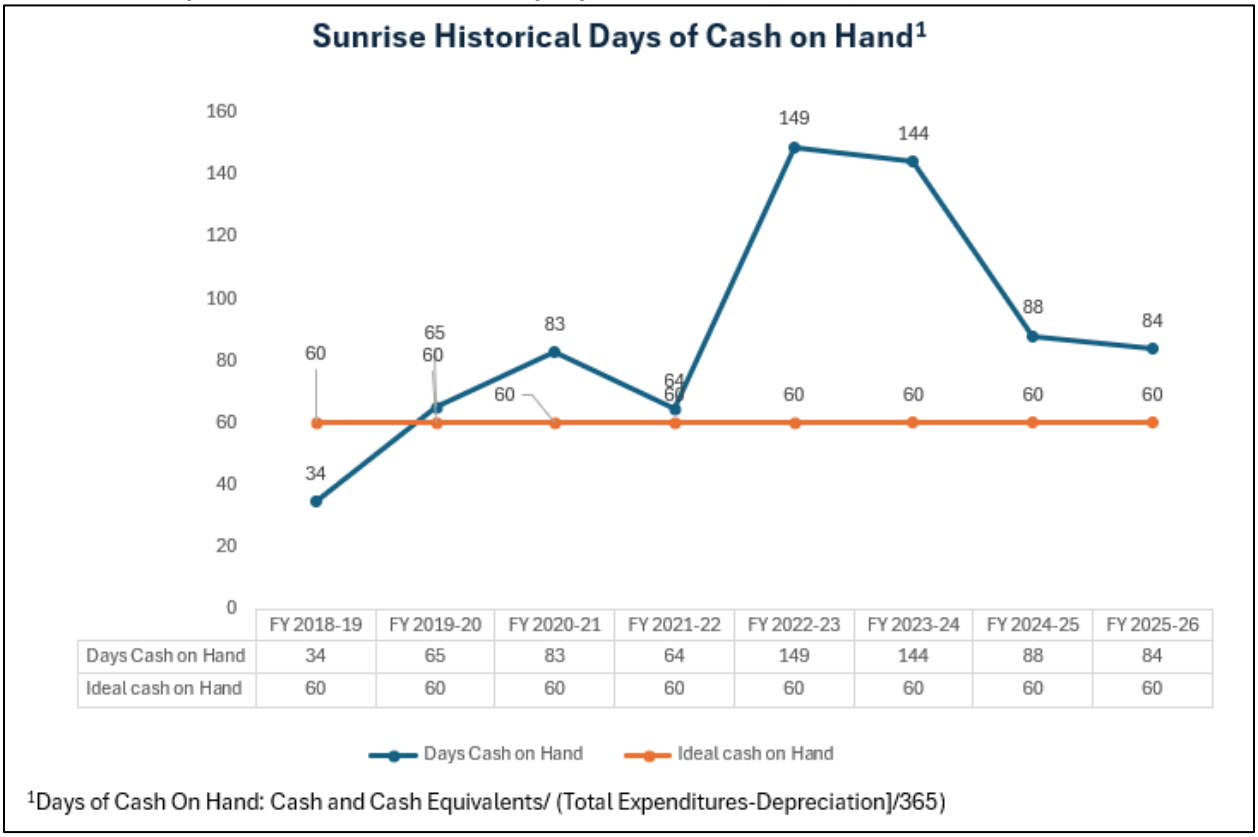


	MYP 2026-27	MYP 2027-28	MYP 2028-29	MYP 2029-30	MYP 2030-31	MYP 2031-32
Days Cash on Hand	68	63	66	86	101	95
Ideal Cash on Hand	60	60	60	60	60	60

[1]Days of Cash On Hand: Cash and Cash Equivalents/ ([Total Expenditures-Depreciation]/365)

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Object 28: Sunrise Historical Days of Cash on Hand (DCOH)



Potential Civil Liability Effects on the School and County Office

Sunrise is in compliance with its current MOU, including the insurance and indemnification, defense, and hold harmless provisions. The Renewal Petition specifies that Sunrise will carry insurance as recommended by its insurance company and enter into an MOU to indemnify SCCOE. It is essential that Sunrise comply with the SCCOE's current requirements regarding insurance and indemnification, defense, and hold harmless (not just its insurance carrier's recommendations) to protect SCCOE and Sunrise from potential civil liability effects of Sunrise's operations. The 2026 MOU has already been executed by Sunrise. There is no reason to believe Sunrise will not continue to abide by SCCOE's requirements and the agreed upon MOU and/or an addendum thereto.

5. Exclusive Public Employer

As required by the Charter Schools Act, the Charter specifies EXTI dba Sunrise shall be deemed the exclusive public employer of the employees of the Charter School for the purposes of Educational Employment Relations Act ("EERA").

6. Requirements for Grade-Levels Served, Facility Location, and Students Served

Sunrise currently serves 5-8. It is located within the boundaries of the SJUSD in a facility leased for Sunrise's specific needs, and Sunrise plans to remain at that location throughout the renewal term through a Prop 39 facility agreement or an alternative long-term lease. Sunrise is located at 1149 E Julian Street, San Jose, CA.

The Charter Schools Department Staff found Sunrise can meet the requirements for grade levels served, facility location, and students served.

7. Any Other Criteria Set Forth in the Statute

Since Sunrise's Charter was last renewed, several new laws have gone into effect, including but not limited to AB 1505, AB 1507, AB 1219, SB 126, SB 820, SB 98, and AB 126, which enacted broad changes to the Charter Schools Act. Sunrise will need to comply with the changes to the law.

CONCLUSION

The Charter Schools Department Staff reviewed Sunrise's Renewal Petition and considered it against the standards for renewal of middle performing school, utilizing the criteria set forth in Education Code Sections 47605, 47607, and 47607.2.

Staff recommends the Sunrise Charter be renewed with the condition that EXTI dba Sunrise enter into an addendum to the MOU on or before December 31, 2026, or such later deadline as agreed to by the County Superintendent or designee, which addresses each of Staff's concerns and recommended conditions identified above, including as specifically reviewed in this Staff Analysis, Recommendations, and Proposed Findings of Fact, as well as any additional conditions identified by the SCCBOE.

Staff further recommends that the SCCBOE effectuate these actions by adopting the proposed resolution entitled: Resolution Approving with Conditions for a term of July 1, 2027, through June 30, 2032, the Charter Renewal for Sunrise Charter School, and, Alternatively, Making Written Factual Findings Supporting Denial & Denying the Sunrise Charter School Charter Renewal if the Requirements Are Not Met.

Student Impact

The Charter School Department provides oversight and monitoring for 20 County Board of Education authorized charter schools. Sunrise was authorized by SCCBOE in 2014 and currently serves approximately 320 students.