Charter Leaders Meeting
January 26, 2023
Recording
Welcome!

SCCOE’s Charter Schools Department:
- Mefula Fairley – Executive Director
- Justin Fallon – Administrative Assistant IV
- Michelle Johnson, Ed.D. – Associate Director
- Matthew Daugherty – Administrator
- Shallu Sharma – Financial Administrator
- Cynthia Tapia – Financial Administrator
Introductions and Check-in

• School or CMO Name
• What is giving you life?*

*Slang.net describes “giving me life” is a phrase used to exclaim that something or someone is exciting to you. It is a hyperbolic phrase as it equates life with something that is amusing or entertaining.
Zoom Protocols

• Please mute microphones
• Use the "Chat" for questions
• Use "Raise Hand" to share
Agenda

• Welcome
• Celebrations and Shout Outs
• Continuous Improvement and Accountability
• Fiscal Updates
• Program Updates
Continuous Improvement & Accountability Updates

Dr. Dawn River, Assistant Director
Deann Walsh, Manager
Charter Schools Department
Fiscal Team Updates

Shallu Sharma, Financial Administrator
Cynthia Tapia, Financial Administrator
Economic Outlook

- May 2020 COVID-19 Pandemic → 2023-24 Business as usual
- Stifle economic growth
  - Persistent inflation
  - Rising Interest Rates
  - Supply chain issues
  - Struggling stock market
- Governor’s proposal includes a $22.5 billion budget gap
  - Forecasted revenues are $29.5 billion below 2022-23 Enacted Budget
- Governor’s Budget assumes a slowdown, but no recession.
- Governor projects $34.7 billion in Reserves
  - $8.5 billion Public School System Stabilization Account (Prop 98 Reserves)
  - Current proposal does not tap into the reserve accounts.
2023-24 Local Control Funding Formula (LCFF) Overview

<table>
<thead>
<tr>
<th>Statutory COLA</th>
<th>8.13%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Categorical Programs</strong></td>
<td><strong>$$</strong></td>
</tr>
<tr>
<td>COLA also applied to other educational programs funded outside of the LCFF</td>
<td></td>
</tr>
</tbody>
</table>

New

Equity Multiplier

In conjunction with accountability improvements, intended to augment resources to support highest-needs schools
# 2023-24 LCFF Funding Factors

<table>
<thead>
<tr>
<th>Grade Span</th>
<th>TK</th>
<th>K-3</th>
<th>4-6</th>
<th>7-8</th>
<th>9-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23 Base Grant per ADA</td>
<td>$9,166</td>
<td>$9,166</td>
<td>$9,304</td>
<td>$9,580</td>
<td>$11,102</td>
</tr>
<tr>
<td>8.13% COLA</td>
<td>$745</td>
<td>$745</td>
<td>$756</td>
<td>$779</td>
<td>$903</td>
</tr>
<tr>
<td>2023-24 Base Grant per ADA</td>
<td>$9,911</td>
<td>$9,911</td>
<td>$10,060</td>
<td>$10,359</td>
<td>$12,005</td>
</tr>
<tr>
<td>Grade Span Adjustment</td>
<td>$1,031</td>
<td>$1,031</td>
<td>–</td>
<td>–</td>
<td>$312</td>
</tr>
<tr>
<td>TK add-on (inclusive of COLA)</td>
<td>$3,042</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>2023-24 Adjusted Base Grant per ADA</td>
<td>$13,984</td>
<td>$10,942</td>
<td>$10,060</td>
<td>$10,359</td>
<td>$12,317</td>
</tr>
<tr>
<td>20% Supplemental Grant per ADA(^1)</td>
<td>–</td>
<td>$2,188</td>
<td>$2,012</td>
<td>$2,072</td>
<td>$2,463</td>
</tr>
<tr>
<td>65% Concentration Grant per ADA(^2)</td>
<td>–</td>
<td>$7,112</td>
<td>$6,539</td>
<td>$6,733</td>
<td>$8,006</td>
</tr>
</tbody>
</table>

\(^1\) Maximum amount per ADA—to arrive at LEA’s grant amount, multiply adjusted base grant per ADA by 20% and Unduplicated Pupil Percentage (UPP)

\(^2\) Maximum amount per ADA—to arrive at LEA’s grant amount, multiply adjusted base grant per ADA by 65% and UPP above 55%

Source: School Services of CA Inc.
COLA also applied to other educational programs funded outside of the LCFF
LCFF Equity Multiplier

- $300 million new, ongoing Prop 98 funds to establish an Equity Multiplier add-on to the LCFF
- Intended to accelerate learning gains and close opportunity and outcome gaps
- Address the needs of students in the lowest-performing student groups
- Funds are allocated to LEAs, but eligibility is determined by school sites
LCFF Equity Multiplier—Distribution of Funds

Elementary and middle schools serving at least 90% of students who are eligible for federal free meal program

High schools serving at least 85% of students who are eligible for federal free meal program
Arts, Music, and Instructional Material (AMIM) Block Grant

- The Governor’s Budget proposes a $1.2 billion reduction in the $3.5 billion one-time funding provided in the 2022-23 Enacted Budget package, bringing the appropriation down to $2.3 billion.
Transitional Kindergarten (TK)

• The Governor continues to prioritize the implementation of TK
• Prop 98 minimum guarantee is “rebenched” to account for TK students
• Governor proposes to maintain the current cap
  • Class size capped at 24 students
  • Adult- to- Pupil ratio 12:1
• TK teachers who are first assigned to a TK classroom after July 1, 2015, must meet additional requirements by August 1, 2023
• Penalties will be calculated through the annual audit process
Additional Categorical Funding

**Literacy Coaches & Reading Specialist Grants**
- $250 million – 2\(^{nd}\) round of one-time funding
  - Expand the number of high-poverty schools participating to train & hire literacy coaches & reading specialists
- $1 million – One-time funding
  - Literacy Roadmap to help educators navigate existing literacy programs

**12\(^{th}\) Grade Cultural Enrichment**
- $100 million – one-time funding
  - Provide 12\(^{th}\) grade students opportunities to visit museums, attend theater performances, or participate in enrichment activities.
  - ~$200 per 12\(^{th}\) grade/student

**Opioid Overdose Reversal**
- $3.5 million – ongoing funding
  - Middle & high school sites to maintain medication to reverse opioid overdose
Charter School Facility Grant Program

- 2022-23 Proposal
  - $30 million augmentation for “Other Costs” reimbursement
    - Second and final one-time appropriation as defined in the 2022 Budget Act
  - $4.3 million growth augmentation
  - $4.9 million to fund 8.13% COLA

- Pending state audit
  - Audit report may be posted in the upcoming weeks.

- Conflict of Interest
  - California School Finance Authority is omitting pre-existing conflict of interest regulations that existed prior to the enactment of SB126.
What is NOT in the Proposed Budget?

- No pension relief
  - CalSTRS – 19.1%
    - Cap at 20.25%
  - CalPERS – 27.0% (estimate)
    - 2023-24 rates TBD
    - No current cap
- No additional COVID-19 related relief
- No ADA relief for Charter Schools
## Upcoming Deadlines

<table>
<thead>
<tr>
<th>Description</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Oversight Finance Meetings – <a href="#">FCMAT Charter School Fiscal Health Risk Analysis Tool</a></td>
<td>Various dates</td>
</tr>
<tr>
<td>CALPADS Fall 1 Amendment Window Ends</td>
<td>01/27/2023</td>
</tr>
<tr>
<td>School Accountability Report Card (SARC)</td>
<td>02/01/2023</td>
</tr>
<tr>
<td>Second Interim Financial Report</td>
<td>03/15/2023 (Actuals thru Jan 31st)</td>
</tr>
<tr>
<td>Auditor Selection Form</td>
<td>03/29/2023</td>
</tr>
<tr>
<td>Educator Effectiveness Funds Local Plan</td>
<td>03/31/2023</td>
</tr>
<tr>
<td>Arts, Music and Instructional Materials Discretionary Block Grant</td>
<td>Discuss and approve an expenditure plan</td>
</tr>
<tr>
<td></td>
<td>*No specified deadline</td>
</tr>
</tbody>
</table>
# School Services California Projection Dartboard

<table>
<thead>
<tr>
<th>Planning Factors</th>
<th>2022-23</th>
<th>2023-24</th>
<th>2024-25</th>
<th>2025-26</th>
<th>2026-27</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOF(^1) Planning COLA</td>
<td>6.56%</td>
<td>8.13%</td>
<td>3.54%</td>
<td>3.31%</td>
<td>3.23%</td>
</tr>
<tr>
<td>California CPI(^2)</td>
<td>6.00%</td>
<td>3.44%</td>
<td>2.77%</td>
<td>2.49%</td>
<td>2.74%</td>
</tr>
<tr>
<td>Unemployment Insurance</td>
<td>0.50%</td>
<td>0.20%</td>
<td>0.20%</td>
<td>0.20%</td>
<td>0.20%</td>
</tr>
<tr>
<td>California Lottery</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted per ADA</td>
<td>$170</td>
<td>$170</td>
<td>$170</td>
<td>$170</td>
<td>$170</td>
</tr>
<tr>
<td>Restricted per ADA</td>
<td>$67</td>
<td>$67</td>
<td>$67</td>
<td>$67</td>
<td>$67</td>
</tr>
<tr>
<td>Mandate Block Grant (District)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grades K-8 per ADA</td>
<td>$34.94</td>
<td>$37.78</td>
<td>$39.12</td>
<td>$40.41</td>
<td>$41.72</td>
</tr>
<tr>
<td>Grades 9-12 per ADA</td>
<td>$67.31</td>
<td>$72.78</td>
<td>$75.36</td>
<td>$77.85</td>
<td>$80.36</td>
</tr>
<tr>
<td>Mandate Block Grant (Charter)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grades K-8 per ADA</td>
<td>$18.34</td>
<td>$19.83</td>
<td>$20.53</td>
<td>$21.21</td>
<td>$21.90</td>
</tr>
<tr>
<td>Grades 9-12 per ADA</td>
<td>$50.98</td>
<td>$55.12</td>
<td>$57.07</td>
<td>$58.96</td>
<td>$60.86</td>
</tr>
</tbody>
</table>

\(^1\)Department of Finance (DOF)  
\(^2\)Consumer Price Index (CPI)
# Summary of Plans for Categoricals

- **Required plans and approval requirements**

<table>
<thead>
<tr>
<th>Plan</th>
<th>Link to Plan Template/More Information</th>
<th>Deadline</th>
</tr>
</thead>
</table>
| Expanded Learning Opportunities Program (ELO-P) | [https://www.cde.ca.gov/ls/ex/documents/eloppr
 ogplanguide.pdf](https://www.cde.ca.gov/ls/ex/documents/eloppr
 ogplanguide.pdf)                  | N/A per current law                          |
| Arts, Music, and Instructional Materials Discretionary Block Grant | AB 181 Section 134 | Discuss and approve a plan for expenditure; No specified deadline |
| Educator Effectiveness Funds                  | EC § 41480(d)                          | March 31, 2023                                |
| Home-to-School Transportation                | EC § 39800.1                           | Develop and adopt a plan on or before April 1, 2023 |

¹Elementary and Secondary School Emergency Relief (ESSER)  
²Governor’s Emergency Education Relief (GEER)

Source: School Services of California Governor’s Proposals for the 2023-24 State Budget and K-12 Education
### One-Time Federal Categorical Expenditure Deadlines

<table>
<thead>
<tr>
<th>Fund</th>
<th>Fund Source and/or Distribution Methodology</th>
<th>Resource Code</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESSER II</td>
<td>Federal funds distributed in proportion to Title I allocation</td>
<td>3212</td>
<td>September 30, 2023</td>
</tr>
<tr>
<td>ESSER II (state reserve)</td>
<td>Federal funds included in Expanded Learning Opportunities (ELO) Grant</td>
<td>3216</td>
<td>September 30, 2023</td>
</tr>
<tr>
<td>GEER II</td>
<td>Federal funds included in ELO Grant</td>
<td>3217</td>
<td>September 30, 2023</td>
</tr>
<tr>
<td>ESSER III (state reserve)</td>
<td>Federal funds included in ELO Grant</td>
<td>3218</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>ESSER III (state reserve for learning loss)</td>
<td>Federal funds included in ELO Grant</td>
<td>3219</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>ESSER III</td>
<td>Federal funds distributed in proportion to Title I allocation</td>
<td>3213</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>ESSER III (LEA 20% reserve for learning loss)</td>
<td>Federal funds distributed in proportion to Title I allocation</td>
<td>3214</td>
<td>September 30, 2024</td>
</tr>
</tbody>
</table>

Source: School Services of California Governor’s Proposals for the 2023-24 State Budget and K-12 Education
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<tr>
<th>Fund</th>
<th>Fund Source and/or Distribution Methodology</th>
<th>Resource Code</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>ELO Grant (10% set aside for paraprofessionals)</td>
<td>State funds included in ELO Grant</td>
<td>7426</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>ELO Grant</td>
<td>State funds included in ELO Grant</td>
<td>7425</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>In-Person Instruction Grant</td>
<td>State funds allocated proportionately based on 2020-21 LCFF entitlements</td>
<td>7422</td>
<td>September 30, 2024</td>
</tr>
<tr>
<td>Arts, Music, and Instructional Materials Discretionary Block Grant</td>
<td>State funds allocated based on 2021-22 P-2 ADA(^1)</td>
<td>6762</td>
<td>June 30, 2026</td>
</tr>
<tr>
<td>Educator Effectiveness Block Grant</td>
<td>State funds allocated based on 2020-21 certificated and classified FTEs</td>
<td>6266</td>
<td>June 30, 2026</td>
</tr>
<tr>
<td>Learning Recovery Emergency Block Grant</td>
<td>State funds allocated based on 2021-22 P-2 ADA multiplied by 2021-22 UPP</td>
<td>7435</td>
<td>June 30, 2028</td>
</tr>
</tbody>
</table>

\(^1\)State special schools ADA proxy is 97% of 2021-22 CBEDS Enrollment

Source: School Services of California Governor’s Proposals for the 2023-24 State Budget and K-12 Education
Charter Schools Department
Program Team Updates

Mefula Fairley, Executive Director
Michelle Johnson, Ed.D, Associate Director
Matt Daugherty, Administrator
School Accountability Report Card

- Due February 1
- Complete all the sections
- This fulfills some of the Williams components
- Physical Fitness Tests
  - Required to be administered as of 2021-22
  - Reported on SARC (add last years data)
  - Grades 5, 7, and 9
  - Changes – no longer required to gather age, gender, height or weight
  - 2022-23 Window open February 1 – May 31
Comprehensive School Safety Plan

• Must be updated annually by March 1
• Must include all components
• Must be reviewed by First Responders:
  • San Jose Police
    School Liaison Unit
    408-277-5263
  • San Jose Fire Dept.
    Bureau of Administrative Services
    408-794-7000
New Laws Effective January 1

- Minimum wage law - $15.50/hour
- TK Ratio - 1:12
- Illegal to deter union membership
- New leaves (Bereavement Leave and Family Leave)
- Job postings revised to include wage scale
- Brown Act: Teleconferencing Options
- Open Meeting Documentation
- Ethics Training
- Juneteenth
- HVAC Systems and Filters
- Excused absences for student civic or political events
Renewal Timelines

Renewal Petition Review:
- 60 days after submission, public hearing held
- 90 days after submission, decision hearing held
- 15 days prior to decision hearing, findings and recommendations published

Sample Possible Timeline:
- Submission to SCCOE: August 13, 2023 - start 90 days clock
- SCCOE public hearing: September 20, 2023 – within 60 days
- Site visit: September 21, 2023
- Post Recommendations: October 31, 2023
- SCCOE decision: November 15, 2023 - now have 30 days to appeal to ACCS

Watch SCCBOE meeting calendar
5 schools up for renewal in 2023-24 (Bullis, AJHS, RBM, RSA, RSSP)
4 district schools possible for appeal
Annual Visits

- Charter School Site Visit Protocol
  - Support For All Learners Template: [https://www.sccoe.org/supoffice/charter-schools-office/Documents/Support%20for%20All%20Learners%20Template.docx](https://www.sccoe.org/supoffice/charter-schools-office/Documents/Support%20for%20All%20Learners%20Template.docx)

- Annual Visit Forms
  - Google Doc - Annual Visit Schedule
  - Monday.com – “Governance” Annual Visit Materials label

- Annual Visit Reports
  - will be sent in April after all the visits are completed
Communication

• Keep us in the loop!
  • It is **better** to ask for permission than to beg for forgiveness
2022-23 Charter Leader Meetings

Meeting Location:
Virtual

Save-the-Date

• May 18, 2023