

# Charter Leaders Meeting

## October 20, 2022

# Recording



# Welcome!

## **SCCOE's Charter Schools Department:**

- Mefula Fairley– Executive Director
- Justin Fallon – Administrative Assistant
- Michelle Johnson, Ed.D. – Associate Director
- Matthew Daugherty – Administrator
- Shallu Sharma – Financial Administrator
- Cynthia Tapia – Financial Administrator

# Introductions and Check-in

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- School or CMO Name
- Share celebrations and shout outs in the chat?



# 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
- Youth Health and Wellness
- Program Updates
- Special Presentation by FCMAT:  
Charter School Fiscal Health  
and Risk Assessment Tool



# Celebrations and Shout Outs

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# Continuous Improvement & Accountability Updates

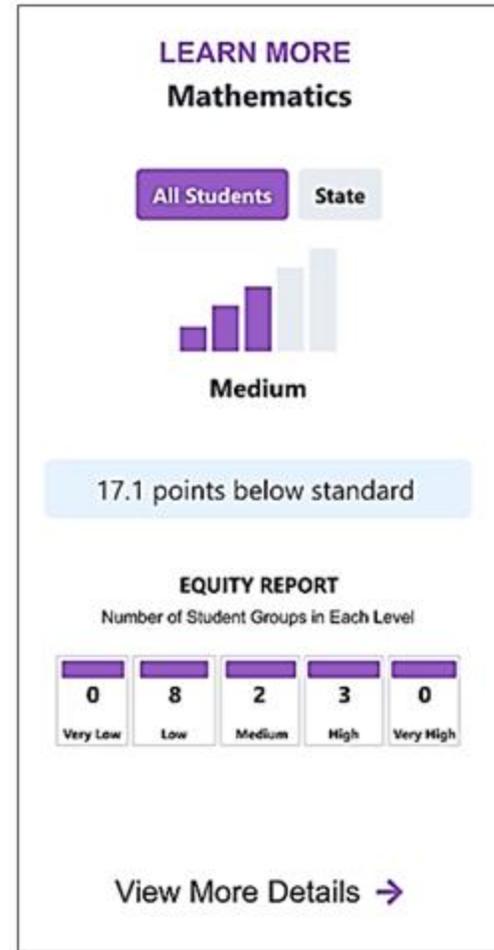
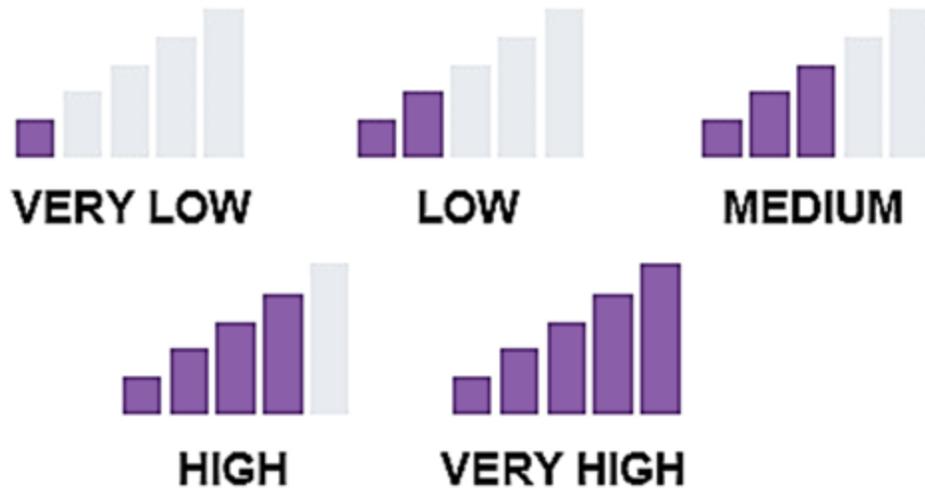
Alissa Meltzer

Dr. Dawn River

# Assessment & Accountability

# Accountability - 2022 Dashboard Preview

- Status Only
  - ◆ “Cell Phone Bars”
  - ◆ Single color for all status levels
- No Change or Indicator Colors
  - ◆ ...Just Purple!!



# Accountability - Future Dashboard Reports

State Indicators	2022 Dashboard	2023 Dashboard	2024 Dashboard
Academic	Status Only	Colors Reported	Colors Reported
Suspension	Status Only	Colors Reported	Colors Reported
Chronic Absenteeism	Status Only	Colors Reported	Colors Reported
Graduation Rate	Status Only	Colors Reported	Colors Reported
CCI	N/A	Status Only	Colors Reported
ELPI	Status Only	Colors Reported	Colors Reported

# Accountability - 2022 Dashboard Changes

- ❑ Updated Academic Indicator Participation Rate Penalty
  - ❑ Missing the 95% requirement results in LOSS scores assigned at school, district, and/or student group level(s)
- ❑ Updated District of Residence Rules
  - ❑ Previously only applied to the Academic Indicator
  - ❑ 2022 & Beyond...will apply to all State Indicators
- ❑ [DASS Update](#)
  - ❑ On July 27 ED declined CA's waiver request to maintain DASS modified methods for calculating the Academic and Graduation Rate Indicators
  - ❑ Discussed at September SBE...



# SBE | September Board Action

## ❖ APPROVED: DASS

- Continue to report DASS modified methods and non-modified methods on the Dashboard
- DASS schools eligible for CSI Low-Graduation Rate will not be identified as “CSI Schools” but as “DASS Community of Practice”
- Develop differentiated improvement activities for schools that predominantly serve students returning to education after exiting secondary school without a diploma



# SBE | September Board Action

## ❖ Accountability, continued

- APPROVED: lowest status level will be used as a proxy for Red to determine LEA eligibility for DA
- APPROVED: inserting links on the Dashboard to...
  - Teacher assignment data supported through DataQuest
  - Science results supported through the CAASPP website



# Accountability - Support Determinations

## ESSA (CSI & ATSI) *Federal Accountability*

- All indicators with the lowest status
- All indicators with the lowest status but one indicator of ANY other status
- Five or more indicators where a majority are at the lowest status
- All indicators in the lowest two statuses

# SBE | September Board Action

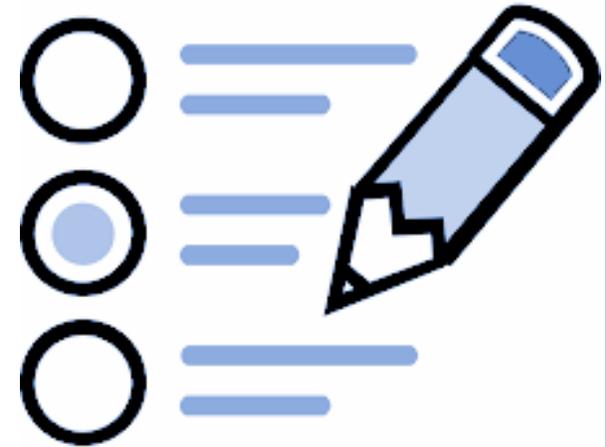
## ❖ Assessment

- APPROVED: Smarter Balanced adjusted form blueprints for English language arts/literacy and mathematics
- APPROVED: CAA for Science threshold scores
- APPROVED: 2022-23 students scores reports for CAASPP and Summative ELPAC and Summative Alternate ELPAC



# Additional Assessment Updates

- ❑ [CDE Assessment Program Updates | September 2022](#)
- ❑ [Statewide Release of Assessment Data](#)
  - ❑ Updated timeline of October 2022
- ❑ Administration and Scoring Trainings in Moodle
  - ❑ Summative ELPAC opens on October 17th
  - ❑ Summative Alternate ELPAC opens on November 1st
- ❑ Upcoming PD Opportunities...
  - ❑ [101st Annual CERA Conference](#) | November 2-4, Disneyland



# Teaching Assignment Monitoring Outcome (TAMO) Report

- **Data Source:** CTC and the California Department of Education (CDE) to enter into a data-sharing agreement to facilitate the annual monitoring of teacher assignments.
  - ◆ As part of this data-sharing agreement, the CDE is required to provide the CTC with certificated staff assignment data that are submitted to the CDE by local educational agencies (LEAs) through the annual California Longitudinal Pupil Achievement Data System (CALPADS) Fall 2 data submission
  - ◆ ESSA Categories: Clear, Out-of-Field, Intern, Ineffective, *Incomplete*, *Unknown*, *NA*
- **Uses:** The CDE uses the AMO data for the following reporting purposes: DataQuest reporting, the School Accountability Report Card (SARC), California School Dashboard Priority One, Williams Determinations, Teacher Equity Plan, and federal Teacher Shortage and EDFacts reporting
- **Resources:** [CDE Webpage](#) (TAMO Training Videos) [PEAT TAMO PPT](#)

# QUESTIONS

# State & Federal Programs

# Title 1 and Homeless Services Reservation

LEAs must reserve Title I, Part A funds for homeless children and youths, including providing educationally related support services to children in shelters and other locations where children may live, that are necessary to provide services comparable to those provided to all students in the LEA (**LCAP Federal Addendum/Title I-Provision 3**)

## Determining, Using, and Changing the “Set-Aside”:

- LEA may determine how it calculates the set-aside amount based on need.
- Effective collaboration and communication between Title 1 and homeless/McKinney-Vento staff is key. This includes identifying the amount of funds, use of funds, partnering in trainings, ensuring all eligible students are included in official plans, disseminating information regarding policies and procedures, build awareness and understanding among staff, and the sharing of resources and handbooks
- Services provided from the set-aside amount should meet the unique needs of homeless students, **above and beyond** services provided through regular Title 1, Part A programs

# Title 1 and Homeless Services Reservation

## Funds are reported via CARS during the Winter and Spring release

- Winter (January - February) - report the set-aside amount on the page titled “Title I, Part A LEA Allocation and Reservations
- Spring (May - June) - find the page titled “Homeless Education Policy, Requirements, and Implementation” and indicate information on the implementation of homeless education.

## Resources

- [Supporting Children and Youth Experiencing Homelessness Using Title 1, Part A](#)
- [Title I Reservations for Homeless Education](#)
- [Title 1, Part A: Information and Allowable Uses](#)
- [Homeless Education \(CDE\)](#)
- [LCAP Federal Addendum info](#)

# Imperial County Office of Education (ICOE) continues their series on Improving Outcomes for English Learners with Disabilities

## Webinar: English Learner Initial Referral to Special Education and Decision-Making Process

**December 5, 2022** (8:30 a.m. - 12 p.m.)

Register to attend in-person:

<http://icoe.k12oms.org/1168-225996>

Register to Participate via ZOOM:

<http://icoe.k12oms.org/1168-226002>

**Improving Outcomes for English Learners with Disabilities**

  **ccee**  
California Collaborative  
Educational Excellence

### English Learner Initial Referral to Special Education and Decision-Making Process

**Presenter: Timothy L. Tipton, M.A., CCC-SLP**



Timothy Tipton is a Speech-Language Pathologist for San Diego Unified School District where he provides consultation, policy development and professional development regarding English learners and culturally diverse issues in special education. Timothy is also the Coordinator of the District's transdisciplinary bilingual consultation and assessment team and a practicing bilingual SLP. He was formally an ESL teacher in Japan, a bilingual classroom teacher and a Senior SLP in San Diego for 9 years. Timothy has presented nationally and locally on evidence-based practices in speech-language pathology and special education services for students from diverse linguistic and cultural backgrounds. He is also currently a lecturer in bilingual speech-language pathology of master level students at San Diego State University.

Timothy is the co-author of San Diego Unified School District's **Comprehensive Evaluation Process for English Learners (CEP-EL)**, a district-wide, board-approved process developed to guide staff in pre-referral interventions, appropriate identification for special education services and IEP supports. He has also helped lead school district efforts to reduce disproportionality of culturally and linguistically diverse groups in Special Education. Timothy was a contributor and consultant to the **California Practitioners' Guide for Educating English Learners with Disabilities**.

**December 5, 2022** | **8:30 AM TO 12:00 PM**

**Intended Outcomes:**

- Review a Decision-Making Process recommended for when English learners are experiencing academic and/or behavioral difficulties based on performance data collected across settings, analysis of strengths and weaknesses, and comparison to peers (where possible, from similar backgrounds).
- Rule out relevant extrinsic factors as the primary contributors to the student's difficulties to determine if a referral for special education is warranted.
- Navigate through the necessary steps to identify, investigate, and intervene in the extrinsic factors, academic concerns, and/or behavioral concerns impacting achievement of grade level standards.

**Target Audience:**  
Multi-disciplinary teams are encouraged to participate.

- General & Special Education Teachers
- EL Coordinators
- School Psychologists
- Speech Language Pathologists
- COE, District Level and Site-Based Administrators
- SELPA Administrators & Staff

**Free Event**

ICOE - FLC  
1398 Sperber Rd.  
El Centro, CA 92243

 **OR**  Video Conferencing

Register to attend in-person  
<http://icoe.k12oms.org/1168-225996>

OR

Register to Participate via ZOOM  
<http://icoe.k12oms.org/1168-226002>

Contact: Brenda Sandoval  
(760) 312-6154  
bsandoval@icoe.org

 **Project Funded by CDE**

LCAP Priorities, Special Education State Performance Plan Indicators & EL Reading Principles are highlighted throughout this session.

# QUESTIONS

# Legislative Updates

# Summary of Independent Study (IS) Changes

The intention of the legislature is for LEAs to provide multiple educational options for students including short term and long term IS options. **Independent study is encouraged, not required, for the 2022-23 school year.**

10% Apportionment Cap Exemption has been added

Students with disabilities may participate in IS if their IEP team decides they can receive FAPE in that setting.

Tiered Re-Engagement Procedures have been updated again. Two changes to focus on:

- Include local programs to address chronic absenteeism in your procedures
- Initiate tiered re-engagement strategies when student is not participatory in synchronous instructional offerings 50% of the scheduled times within a school month

# Summary of Independent Study (IS) Changes

## Written Agreement changes:

- Long Term IS (more than 14 days\*) - Written Agreement must be signed **before** student begins
- Short Term IS (14 days or less) - Written Agreement must be signed within 10 days of beginning IS
- Certificated special education employees must sign written agreements if providing programming

For students enrolled in a comprehensive school for classroom based instruction who are participating in IS due to necessary medical treatments or inpatient treatment for mental health care or substance abuse, LEAs are not required to implement tiered re-engagement strategies. LEAs shall obtain evidence from appropriately licensed professionals of the need for student to participate in IS.

A LEA may claim apportionment credit for IS based on the time value of pupil work products, as personally judged by a certificated teacher employed by the LEA, or the combined value of pupil work product and pupil participation in synchronous instruction.

# Independent Study Requirements for ADA Relief

Eligibility is contingent on meeting the following requirements:

1

Must have offered independent study by October 1, 2021

2

Must have adopted and implemented written independent study policies for the 2021-22 school year

3

Must have offered independent study to students who were subject to COVID-19 quarantine during the 2021-22 school year

- **November 1, 2022:** Certify compliance with the above 3 requirements through CDE Web Application
  - *CDE will publish the self-certification form by September 30, 2022 as part of the Principal Apportionment Data Collection Web Application*
- **2022–23 Audit Guide** will incorporate compliance procedures for these requirements

Charter School Independent Study resource: <https://www.cde.ca.gov/fg/aa/pa/iscertadaloss2122.asp#accordionfaq>

# Resources

<a href="#"><u>AB 181 Webinar Recording (7.21.22)</u></a>	<a href="#"><u>AB 181 Webinar Participant Slides</u></a>
<a href="#"><u>AB 181 Independent Study Language</u></a>	<a href="#"><u>Home Hospital Instruction Ed Code 48206.3</u></a>
<a href="#"><u>Sample Board Policy</u></a>	<a href="#"><u>Sample Administrative Regulation</u></a>
<a href="#"><u>AB 181 Independent Study Legislative Language Changes for 2022-23</u></a>	

# Checklist Items for You

- Write or amend Independent Study Policy to conform with new requirements
- Write or amend Independent Study Written Agreement template to conform with new requirements
- Adopt Independent Study Policy at BOE meeting
- Course Based: See language here: ([51749.5](#))
  - Course Based IS course need to be certified by board on an annual basis
- Teachers should be certificated employees of the LEA
- Certify compliance with IS implementation for ADA Relief

# Final Item

Add your name/contact information to our Independent Study mailing list in order to receive updates, as they become available.

Charter School/District	Liaison Name	Liaison Title	Liaison Email

# Arts, Music & Instructional Materials Grant

[AB 181](#) - [Section 134](#) - Arts, Music & Instructional Materials Block Grant

## **New funding opportunity from the 2022 Budget Act**

- \$3.6 Billion in one-time funding through the 2025–26 school year.
- (1) Obtain standards-aligned professional development and acquire instructional materials, in the following subject areas:
  - (A) Visual and performing arts.
- (4) Operational costs, including but not limited, to retirement and health care cost increases.

The intent is for arts and music (proportional share), but may be used for ELA, Math, Science, and more.

Funds may also be used for: professional development on improving school culture, diverse and culturally relevant book collections, and COVID personal protective equipment.

# Arts, Music & Instructional Materials Grant

[AB 181](#) - [Section 134](#) - Arts, Music & Instructional Materials Block Grant

- 50% distribution in December, 2022 & 50% distribution in May, 2023 -- [Preliminary Allocation Spreadsheet](#)
- At this time, there is not a planning template (see below)
- These funds do not require an application

There is flexibility and local control over how the funds are spent and the proportion of funds spent on the arts vs. other subjects/categories.

However, all spending, whether PD, staffing, materials, or supplies, must be standards-aligned and part of an approved plan. There is no due date, but the plan must be approved before use of the funds.

- LEA allocation is based on Principal Apportionment 2021 - 22 ADA [Preliminary Allocation Spreadsheet](#)
- Funds are available for encumbrance through June 30, 2026
- CDE Info Page: <https://www.cde.ca.gov/ci/cr/cf/artsmusicimblockgrant.asp>
- CDE FAQ: coming soon
- CDE 10/14 Webinar: <https://cde.app.box.com/s/tlw5ywph072jisz9aei2lplr634o5shg>

# AB-2375: Homeless Children and Youths

## The Big Ideas

- Signed into law September 30, 2022
- Currently, LEAs that receive certain American Rescue Plan (ARP) funds must administer a housing questionnaire annually to all parents or guardians of pupils and to all unaccompanied youths to identify such students
- New Legislation (AB-2375) would require ***all*** LEAs to administer a housing questionnaire
- May include reimbursements from the state for associated costs

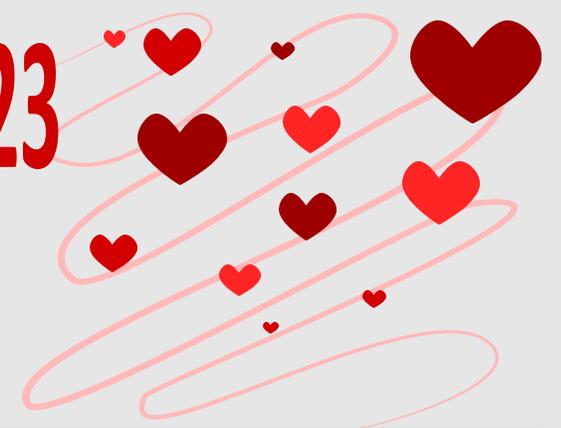
## Resources

- [California Homeless Education Technical Assistance Center \(HETAC\)](#)
- [AB-2375: Homeless Children and Youths and Unaccompanied Youths: Housing Questionnaire](#)
- [CDE Housing Questionnaire Template with Instructions](#)

# QUESTIONS

# LCAP Update

# Save The Date! - Tuesday, February 14, 2023



## Love Your LCAP!

Join your SCCOE Continuous Improvement & Accountability team for a lovely and informative meeting introducing you to any LCAP updates, training on the components of an LCAP, and more!

YOU are my priority! (x8)



I ♥ LCAP

## TODAY'S TO DOs

- Increased and Improved Services
- Engaging Educational Partners
- Goals, Metrics, & Actions
- Supplement To The Annual Update

# More AB 181 (Section 80)

**As you begin to consider engagement with educational partners, new legislation revises Section 52063 of the Education Code. It is amended to read:**

**52063.** (a) (1) The governing board of a school district shall establish a parent advisory committee to provide advice to the governing board of the school district and the superintendent of the school district regarding the requirements of this article.

(2) A parent advisory committee shall include parents or legal guardians of currently enrolled pupils in the school district to whom one or more of the definitions in Section 42238.01 apply, and parents or legal guardians of currently enrolled pupils with disabilities in the school district.

(3) This subdivision shall not require the governing board of the school district to establish a new parent advisory committee if the governing board of the school district already has established a parent advisory committee that meets the requirements of this subdivision, including any committee established to meet the requirements of the federal Elementary and Secondary Education Act, as amended by the federal Every Student Succeeds Act (Public Law 114-95), pursuant to Section 1116 of Subpart 1 of Part A of Title I of that act.

**Basically what this means is that your Parent Advisory/Parent LCAP Advisory/DAC/PAC must have at least one member that is a parent/guardian of a student with disabilities if it is the group that gives input for LCAP. Effective June 30, 2022.**

[AB181](#)

# SB997 - More on LCAP Engagement

This bill requires, beginning July 1, 2024, the governing board of a school district serving middle school or high school pupils and a county superintendent of schools to **either include at least 2 pupils as full members of the parent advisory committee to serve for a renewable term of one full school year, or to establish a student advisory committee** as specified. Education Code Section 52063

SB 997

# QUESTIONS

# Thank You

**Join us next month: November 3**

**Resource folder:** <https://bit.ly/AA-SF2022-23>



**Please add your name to our email list:**

**2022-23 ASSESSMENT, ACCOUNTABILITY, STATE & FEDERAL MONTHLY MEETING CONTACT LIST.**

# State of School Health & Wellness

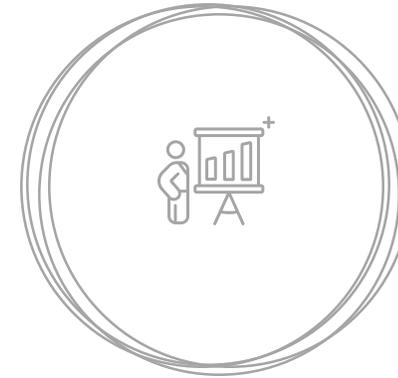
Chaun Powell, Ed.D., LCSW, PPS, CWA  
Executive Director - Youth Health & Wellness  
October 20, 2022

# Statement of Purpose

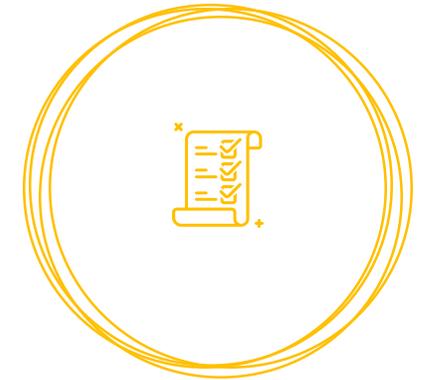
The Department of Youth Health & Wellness is dedicated to supporting the holistic health and well-being of all students. We provide technical assistance, education, and direct health and wellness services that:



**Meet students and families where they are**



**Promote partnership and collaboration between families, schools, and the community**



**Increase awareness of factors that contribute to health and wellness**

**Affirm student, family, and community strengths to nurture growth**

***SO THAT STUDENTS CAN THRIVE***

# What We Do

## Wellness Programs

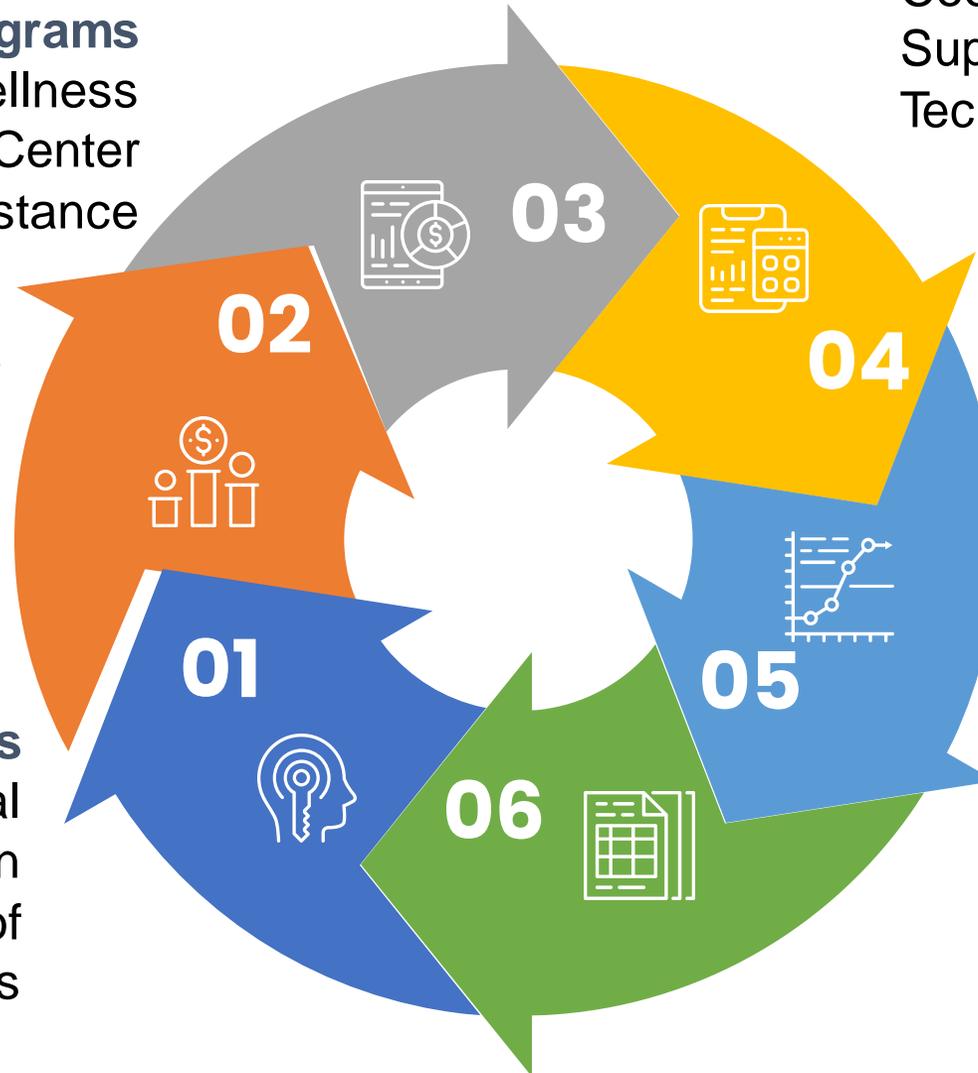
County Operated Wellness Centers & Wellness Center Technical Assistance

## Social Emotional Wellness

Technical Assistance & Support with Transformational Social Emotional Learning, Crisis, Restorative Practice

## Community Schools

Provide technical assistance & support on implementation of community schools



## Physical Health & Wellness

Coordination of Physical Health Supports & Physical Health Technical Assistance & Support

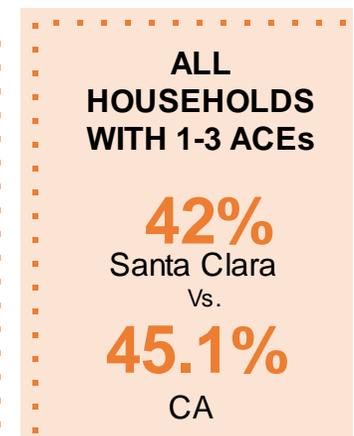
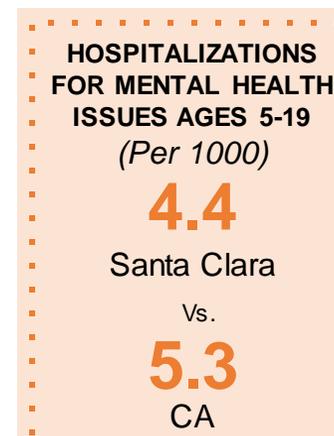
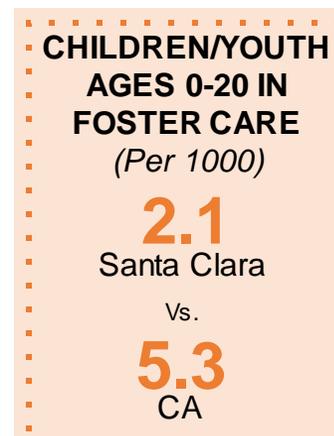
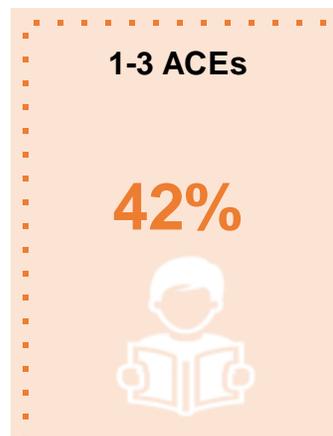
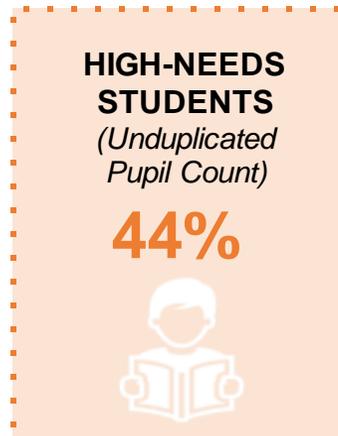
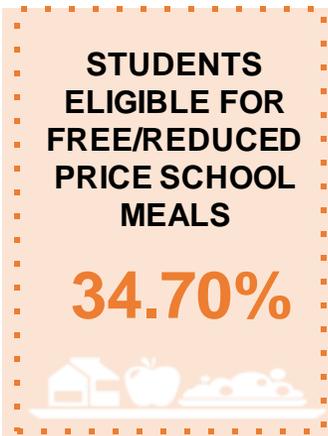
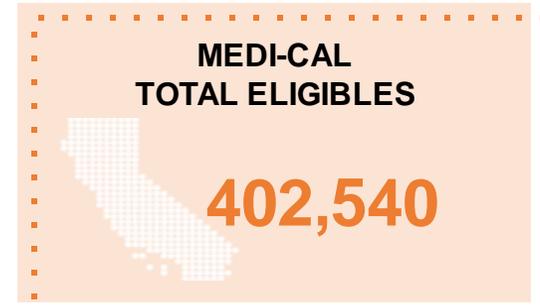
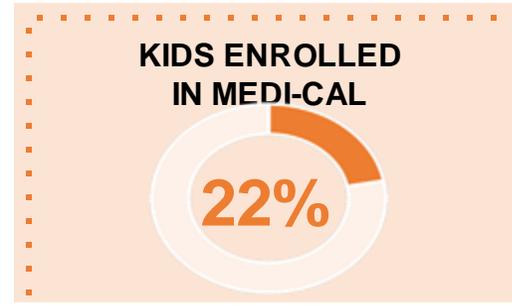
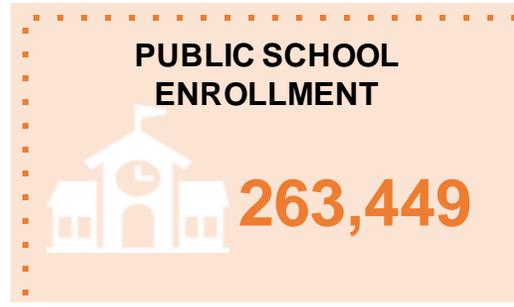
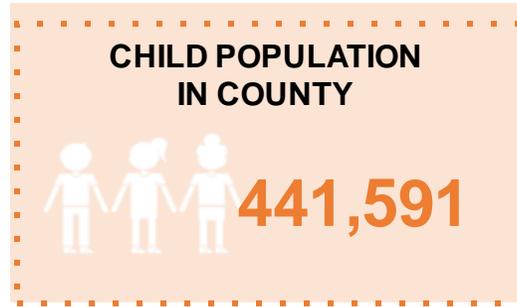
## Attendance & Engagement

Attendance & Engagement Technical Assistance & Support

## School Health Systems

Design and provide training, technical assistance on school-based health systems that are evidence-based, sustainable and revenue generating

# SANTA CLARA DASHBOARD AND DEMOGRAPHIC DATA



Students of  
Color:

70%

Juvenile  
Justice

2X higher

Suicide Rates

81%

Medicaid

## KEY FACTS: STUDENT MENTAL HEALTH

**Students with unaddressed needs are more likely to experience difficulties in school, including:**

- Increased tardiness and absenteeism
- Suspension, expulsion, and high school dropout rates are higher
- Lower grades and test results
- Disruptive behavior in classrooms and hallways
- Perpetrating or being the victim of frequent bullying
- On-campus use of alcohol and other drugs

# State of Health & Wellness Systems of Support

## Current

Robust number of services in a system that is fragmented and demands that families and children negotiate and fit themselves into existing service silos

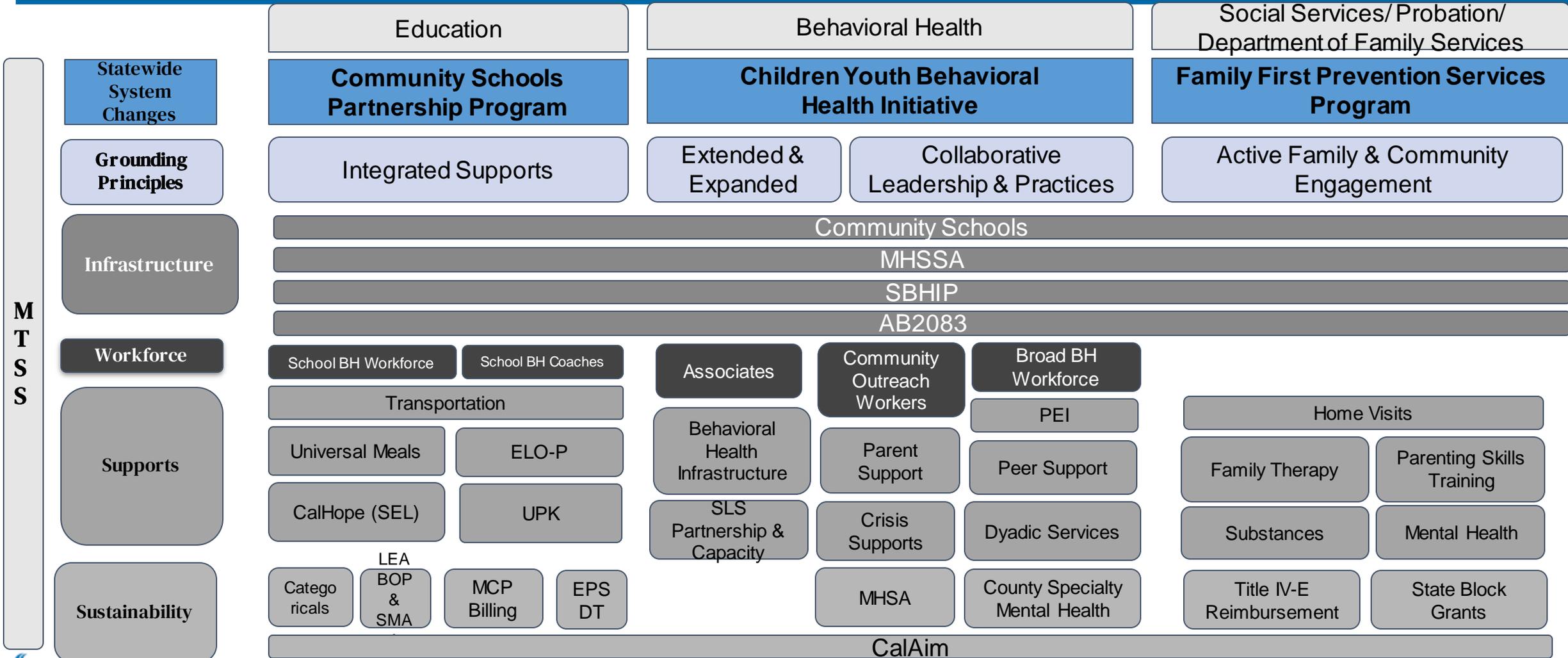


## Desired

Robust services in a system that is integrated, coordinated and embedded into schools mitigating the need for families and children to negotiate service silos.

# Overview of Context

## WHOLE CHILD - WHOLE COMMUNITY APPROACH TO WELLNESS



# What is a Community School?

A “whole child”, whole school improvement strategy, where districts and their schools:

- work closely with teachers, students, families and partner with community agencies and local government to **organize, align & coordinate** community resources to improve student outcomes.



# What is a Community School?

## 4 Pillars

1. Expanded learning time and opportunities
2. Integrated student supports
3. Collaborative leadership and practices
4. Active family and community engagement



## 4 Key Conditions of Learning

1. Supportive environmental conditions that foster strong relationships and community
2. Productive instructional strategies that support motivation, competence, and self-directed learning
3. Social and emotional learning (SEL) that fosters skills, habits, and mindsets that enable academic progress, efficacy, and productive behavior
4. System of supports that enable healthy development, respond to student needs, and address learning barriers

## 4 Cornerstone Commitments

1. A commitment to assets-driven and strength-based practice
2. A commitment to racially just and restorative school climates
3. A commitment to powerful, culturally proficient and relevant instruction
4. A commitment to shared decision making and participatory practices

## 4 Proven Practices

1. Community Asset Mapping and Gap Analysis
2. A Community School Coordinator
3. Site-Based and LEA-Based Advisory Councils
4. Integrating and Aligning with Other Relevant Programs

# The Four Pillars of Community Schools and CA MTSS Framework



## Pillar 1: Integrated Student Supports

**CA MTSS: Whole Child Domain**

- Academic Instruction
- Behavior Instruction
- Social and Emotional and Mental Health Support

**CA MTSS: Integrated Supports Domain**

- Paraeducators to support
- Access to expanded learning opportunities
- Restorative & Trauma Informed Practices

**CA MTSS: Inclusive Policy Structure and Practice Domain**

- Strong LEA/School relationship
- LEA Policy Framework

## Pillar 2: Family and Community Engagement

**CA MTSS: Family and Community Engagement Domain**

- Trusting Family Partnerships
- Trusting Community Partnerships

**CA MTSS: Integrated Supports Domain**

- Ensure all students have access to expanded learning opportunities

**CA MTSS: Inclusive Policy Structure and Practice Domain**

- Strong LEA/School relationship
- LEA Policy Framework

## Pillar 3: Collaborative Leadership and Practices for Educators and Administrators

**CA MTSS: Administrative Leadership Domain**

- Strong and Engaged Site Leadership
- Strong Educator Support System

**CA MTSS: Inclusive Policy Structure and Practice Domain**

- Strong LEA/School relationship
- LEA Policy Framework

## Pillar 4: Extended Learning Time and Opportunities

**CA MTSS: Administrative Leadership Domain**

- Strong and Engaged Site Leadership
- Strong Educator Support System

**CA MTSS: Family and Community Engagement Domain**

- Trusting Family Partnerships
- Trusting Community Partnerships

**CA MTSS: Integrated Supports Domain**

- Use paraeducators to support inclusive education
- Ensure all students have access to expanded learning opportunities
- Integrate Restorative Practices and Trauma Informed Practices

**CA MTSS: Inclusive Policy Structure and Practice Domain**

- Strong LEA/School relationship
- LEA Policy Framework

# Building Community Schools Infrastructure

- \$2.8B (FY 2021 budget) allocated through '27-28
  - **Planning:** \$200k for up to a 2-year planning period; 1/3 match
  - **Implementation:** 5 years; Up to \$500k annually for new community schools or expansion/continuation of existing community schools; 1/3 match
  - **1 lead TA center and ~8 regional TA centers...** in collaboration with the statewide system of support
- So far...
  - Planning grants: 192 grant awards, totalling \$38,200,122.40 (remaining balance, \$96,541,227.60)
  - Implementation grants: 76 grant awards, totalling \$611,087,500 across 458 school sites
  - FY 2022: **additional \$1.3B** to expand the CCSPP
  - Next round, Planning Grant RFA sometime... in Early '23?

1. Community Schools Coordinators
2. Wellness Centers
3. Others



# INTERCONNECTED SYSTEMS FRAMEWORK



- 1 Identify students with social-emotional-behavioral needs **earlier**
- 2 Link students to **evidence-based interventions**
- 3 Use **data** to ensure students are receiving support to improve outcomes
- 4 Expand roles for clinicians to support school personnel and students at **every tier**
- 5 Create healthier school **environments**



## KEY MESSAGES



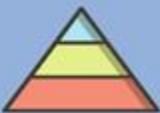
Single System of Delivery



Access is Not Enough



Mental Health is for All



Multi-Tiered System of Support (MTSS) is Essential to Install Systems to Support School Mental Health (SMH)

## ENHANCED MULTI-TIERED SYSTEM OF SUPPORT CORE FEATURES



Integrated Teams



Expanded Data-based Decision Making



Collaborative Selection & Implementation of Single Continuum of Interventions



Comprehensive Screening for Early Access



On-going Coaching

# A Collective Effort: Wellness Center Continuum of Care



ALL STUDENTS

Onsite Crisis Response & Support

Assessment

Family Therapy

Medication Support

Enhanced Care Management

Individual Counseling

Crisis (Mobile Response)

CBO Individual

Empowerment Groups

Youth Led Groups

Therapeutic Groups

Parent Groups



SOME STUDENTS

Wellness Groups

Social Skills Groups/Skillstreaming

Screening

Educator Workshops

Drop In: Check-Ins

Family Engagement Activities

Drop In: Calming Spaces

Linkages & Navigation Support

Student/Family Psychoeducation



FEW STUDENTS

School Culture & Climate

SEL/Character Curriculum

Universal Screening

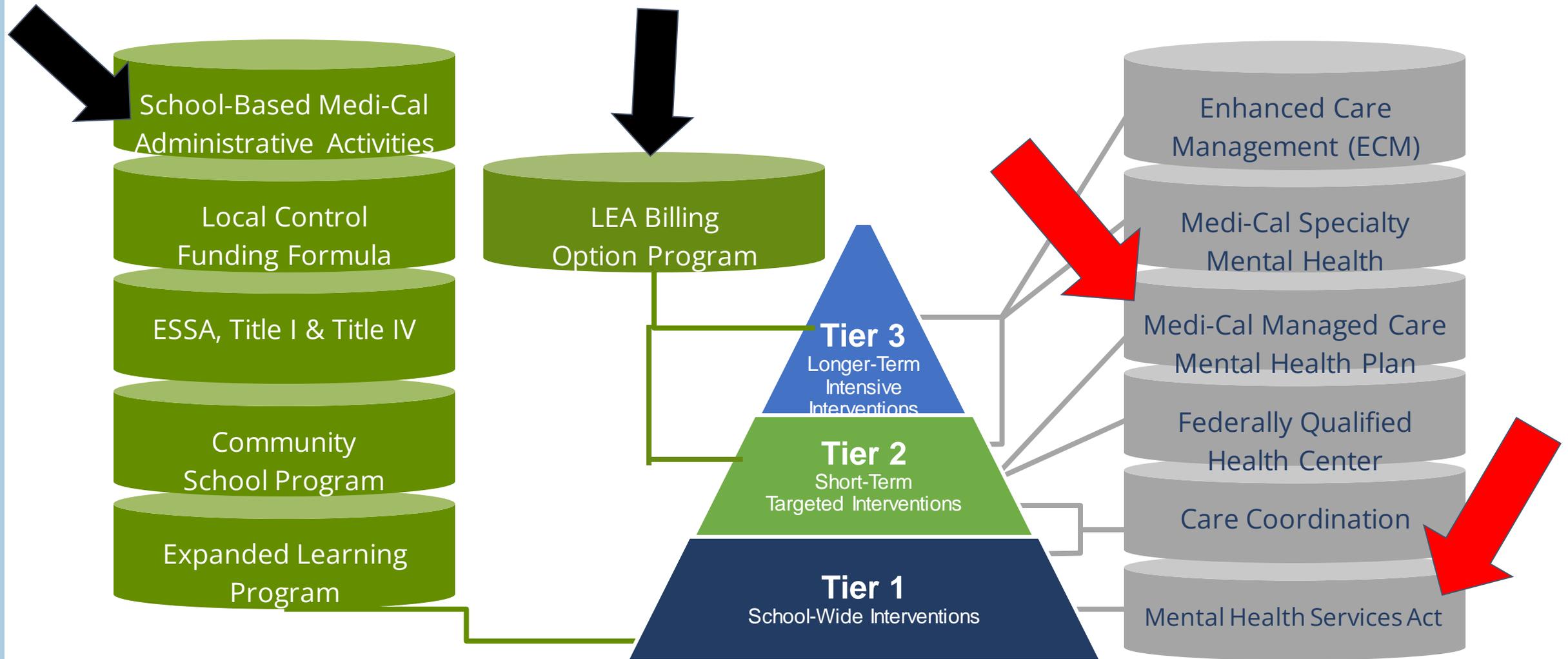
- Schools
- Schools, SLS & Other CBOs
- SLS

# THERE ARE FIVE MODELS THAT SCHOOLS USE TO INTERACT WITH MEDI-CAL PAY



From the Practical Guide for Financing Social, Emotional, Mental Health in Schools:  
<https://cachildrenstrust.org/wp-content/uploads/2020/08/practicalguide.pdf>

# FUNDING STRATEGIES FOR SCHOOL-BASED MENTAL HEALTH



Source: [Public Funding for School-Based Mental Health Programs](#), California School-Based Health Alliance, page 3



**WAVE 1**  
**Psychoanalysis**



**WAVE 2**  
**Behavior Modification**



**WAVE 3**  
**Humanistic/Experiential Psychotherapy**

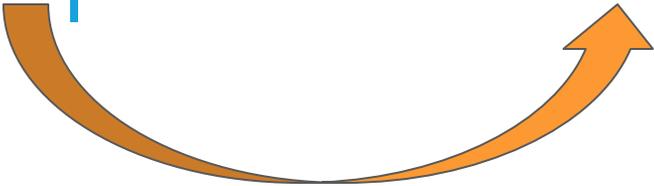


**WAVE 4**  
**Cognitive Psychotherapy**



**WE ARE HERE**

**NOW**



- **Multi-tiered System of Support (MTSS)**
- **Coordination of Services Teams (COST)**
- **Relationship-Centered Community Schools**
- **Redefining Medical Necessity (No Diagnosis Needed for specific billing options)**
- **New MCP School Based Fee Schedule (happening now)**
  - Assessment/Group/Individual Counseling\*
  - Telehealth\*
  - Universal Screening
  - SEL
  - Alternatives to talk based therapy
  - Peer Support
  - Community Defined Practices and Providers
  - Indigenous and Spiritual Practice Integration
  - Family Resources

## FIVE ACTIONS SCHOOL LEADERS CAN TAKE NOW:



**Commit to social, emotional, and mental health as a district priority:** Develop and understanding of the policy and funding shifts occurring and the role schools must play in ensuring access to mental health and wellness services. Identify activities (immediate, short, longterm) that can be done to address the youth mental health crisis which has only grown more stark during the current pandemic.



**Strength & Needs Assessment :** Connect with your thought partners and potential agency collaborators. If applicable, determine who will provide the services and who will do the billing.



**Identify your districts model for support:** Determine your Medi-Cal eligible student population. Understand the various billing options and identify the model your district will participate in. Consider identifying the costs you are incurring that can be claimed from direct and administrative services. Estimate the new and/or additional Medi-Cal revenue that could be generated.



**Design, re-design or refine your program:** Develop the new, enhanced, or expanded services to be financed with the new and/or additional Medi-Cal revenue. Convene a working group to apply the step-by-step process outlined in the resources at the end of this presentation.



**Execute your strategy:** Bill Medi-Cal for services and ensure revenue is reinvested to support students' social and emotional well-being.

# SCCOE School-Based Behavioral Health Work

## Priorities

1. Be in the know! Prepare for implementation of school BH into CDE Statewide System of Supports
2. Alignment, coordination & integration of all school-based services inclusive of partnerships
3. School Wellness Center Key Elements & Best Practices
4. Build & Expand Capacity through TA & Supports
5. Workforce & Internship Pathways
6. Provide direct services regardless of insurance status



### Youth Health & Wellness Team Expansion

Executive Leadership - Policy  
 Directors - Wellness Program  
 Operations, TA & Support, Billing  
 Liaisons & Specialist - School Sites  
 Community Partnerships



### Leadership in School-Behavioral Health

CDE State Lead School Billing  
 CCSPP Technical Assistance Center  
 Partnerships  
 SBHIP  
 MHSSA



### Professional Learning Communities & Coaching

Community Schools, Wellness Centers, School Billing, Crisis Protocols, CHWCP, Adult SEL



### Behavioral Health Trainings

Educators & School BH Providers



### Operation of Wellness Centers

All students regardless of insurance status  
 LEAs & Community Partners

# Supports Available

1. Monthly YHW Highlights
  - a. Sign Up by emailing [youthhealthwellness@sccoe.org](mailto:youthhealthwellness@sccoe.org)
2. District YHW Leaders Collaborative

## Fall 2022

1. Wellness Center PLC
2. Community Schools PLC
3. Child Health Wellness Coordination CoP
4. Santa Clara County Attendance Collaborative
5. Crisis Response Team Series

## Spring 2023

1. School Health Billing PLC
2. Medi-Cal 101 Training
3. Fee Based Coaching

## Upcoming Trainings:

- Risk Assessment
- Art Interventions
- Kognito Modules (10 Free to all Educators)

Webpage:  
[www.sccoe.org/yhw](http://www.sccoe.org/yhw)

Email:  
[Youthhealthwellness@sccoe.org](mailto:Youthhealthwellness@sccoe.org)

The screenshot shows the website for Santa Clara County Office of Education's Youth Health & Wellness department. The page is titled 'YOUTH HEALTH & WELLNESS' and includes a navigation menu at the top. Below the header is a banner image of diverse young people. The main content area is divided into several sections: a mission statement, a list of goals, a grid of service tiles, and an 'EVENTS & RESOURCES' section. The service tiles include Wellness Centers, Attendance Supports, Suicide Prevention, Family Engagement & Supports, Positive Behavioral Interventions & Support, Substance Prevention & Support, Transformational Social Emotional Learning, Care Solace, and Virtual Caring Room. The 'EVENTS & RESOURCES' section has three columns: 'Events' with a calendar icon, 'Resources' with an apple icon and the text 'Your health is an investment. Don't let it expire.', and 'Contact' with a photo of Charlene 'Char' Fenell, Ed.D., LCSW, PPS, Director of Youth Health & Wellness, Professional Learning & Instructional Support Division, and contact information for Paula Leggett, Administrative Assistant.

**H**elping  
**E**very  
**C**hild  
**K**now  
**A**uthentic





# Resources to Support with Next Steps

# Resources

[Kids Mental Health Master Plan](#)

[Santa Clara County for School Wellness Centers: Key Elements of A Wellness Center](#)

[Practical Guide for Financing School SEL & Mental Health](#)

[School Mental Health 101: A Primer for Medi-Cal Managed Care Plans](#)

# DEEPEN YOUR UNDERSTANDING OF STUDENT NEEDS IN YOUR DISTRICT

## STEP 1

KEY ACTIONS	CRITICAL QUESTIONS AND STRATEGIC TIPS
<b>Review the existing plans and documents that articulate student needs and current strategies to support their academic and social emotional well-being.</b>	Key documents include: <ul style="list-style-type: none"> <li>• Local Control Accountability Plan (LCAP)</li> <li>• SELPA Local Plan</li> <li>• Single Plans for Student Achievement (SPSA)</li> <li>• Strategic Plan</li> </ul>
Consolidate data on student demographics, social, emotional and mental well-being, and needs.	<ul style="list-style-type: none"> <li>• California Dashboard, CA Healthy Kids Survey, KidsData, Race Counts, CANS</li> <li>• Use proxy indicators to estimate students who are Medi-Cal eligible, e.g., free/reduced meals, student level data in Title 1 schools.</li> <li>• Review students receiving mental health related services through IEPs<sup>13</sup></li> </ul>
Convene key stakeholders to contextualize the data and understand the root causes.	Engage a diverse cross-section of individuals that can represent various perspectives including school and district leaders, teachers, students, families and community partners.
Develop consensus among your team regarding the students most in need of mental health services.	Which populations, schools, neighborhoods, or regions in your district are the highest priority?

<sup>13</sup> Note that the non-federal portion of your school district's AB 114 funding could be used as the state and local match to draw down federal Medicaid funds.

# EVALUATE YOUR DISTRICT'S CURRENT APPROACH TO SOCIAL, EMOTIONAL, AND MENTAL HEALTH SERVICES AND IDENTIFY GAPS - STEP 2

KEY ACTIONS	CRITICAL QUESTIONS AND STRATEGIC TIPS
<b>Map the current array of programs to support student services.</b>	<ul style="list-style-type: none"> <li>• What social, emotional and mental health services are students provided? How are they funded? How effective are they?</li> <li>• Do schools have established Coordination of Service Teams (COST)?</li> <li>• How do schools invite student and family engagement in district and school level decision making?</li> <li>• Where are the gaps in services and supports?</li> </ul>
Map the supports available to staff.	<ul style="list-style-type: none"> <li>• Are staff trained in best practices in social and emotional learning (i.e., trauma-informed and healing-centered approaches, implicit bias)?</li> </ul>
Identify your framework.	<ul style="list-style-type: none"> <li>• Does your district have an MTSS strategy including social, emotional, and mental health services and supports for students?</li> <li>• What enhancements can you make to the framework based on the student data and landscape assessments above?</li> <li>• If you do not have an MTSS strategy, how can you build a comprehensive framework that can be used to guide your approach?</li> </ul>
Assess your district's current Medi-Cal strategy.	<ul style="list-style-type: none"> <li>• Are you leveraging Medi-Cal reimbursement to provide mental health services?</li> <li>• Are any current district expenditures potential Certified Public Expenditures eligible to draw down Medi-Cal reimbursement?</li> </ul>

<sup>14</sup> See The Collaborative for Academic, Social, and Emotional Learning (CASEL) <https://casel.org>

# CONDUCT ASSET MAPPING IN YOUR COMMUNITY

## STEP 3

KEY ACTIONS	CRITICAL QUESTIONS AND STRATEGIC TIPS
<p><b>Identify essential health and human service providers (public, private, and nonprofit) in your community.</b></p> <p><b>Invite key stakeholders to your school campus to understand current and future program offerings, align interests, and discuss potential collaboration to support students.</b></p>	<ul style="list-style-type: none"> <li>• What non-profits provide mental health services in your area and/or district? How are they funded?</li> <li>• Are there any programs, initiatives or trainings designed to support social, emotional, or mental health needs of students provided by your county office of education? Your county health authority?</li> <li>• What health plans are available in your county? Which ones are your students enrolled in?</li> <li>• What managed care organizations are in your county? Are they currently partnering with school districts?</li> </ul>
<p>Understand the MHSA resources available in your county using the MHSA Transparency Tool.</p>	<ul style="list-style-type: none"> <li>• Develop an asset map of resources in your community that your school district can tap into when designing your model.</li> <li>• Are there county programs, hospitals, foundations, faith-based organizations, non-profits, etc. to tap into for support?</li> </ul>

# SELECT THE IMPLEMENTATION MODEL(S) MOST APPROPRIATE FOR YOUR NEEDS

## STEP 4

KEY ACTIONS	CRITICAL QUESTIONS AND STRATEGIC TIPS
<p><b>Given the needs of your students and the current infrastructure and assets of your school community, determine which of the five School-Medi-Cal models (LEA, CBO, SELPA, COE, CHA) your district can pursue to leverage Medi-Cal to provide student services</b></p>	<ul style="list-style-type: none"> <li>• What are the pros and cons of:               <ul style="list-style-type: none"> <li>◦ Developing your capacity as a school district to directly administer Medi-Cal billing for mental health services to obtain federal reimbursement?</li> <li>◦ Hiring school district staff to provide services to students and/or directly contracting out the work to community-based agencies?</li> <li>◦ Partnering with another agency (CBO, SELPA, COE, CHA) to handle Medi-Cal billing and/or hire and supervise staff to provide services to students?</li> </ul> </li> <li>• How will the Medi-Cal revenue model impact your cash flow projections? Can your existing cash management tools address the impact?</li> <li>• How can you plan for and/or absorb the impact of potential negative audit results? Can you establish a contingency to minimize the financial impact?</li> <li>• How can this work be integrated into the organizational structure? Is there a position or team ready to take on the tasks? Would a stand-alone position serve you best?</li> </ul>

# CREATE FORMAL CONTRACTUAL AGREEMENTS FOR YOUR PARTNERSHIP MODEL(S) - STEP 5

KEY ACTIONS	CRITICAL QUESTIONS AND STRATEGIC TIPS
<p><b>Determine what formal and informal structures are needed to support the delivery of services in the selected partnership model.</b></p>	<ul style="list-style-type: none"> <li>• Clearly articulate any financial commitments between partners from the beginning.</li> <li>• Develop shared goals, outcomes, data collection and sharing agreements.</li> <li>• Identify individuals with primary responsibility to be decision makers and assign staff to be the day-to-day liaison between agencies (and between district and schools).</li> </ul>
<p>Create MOUs between partner agencies to define roles in partnerships and support with coordination and implementation.</p>	<p>Key issues to address in contract language:</p> <ul style="list-style-type: none"> <li>• Staffing</li> <li>• Facilities</li> <li>• HIPAA, FERPA, IDEA, and 504 Plans</li> <li>• Access to student records</li> <li>• Grievance procedures</li> <li>• Communication protocols</li> <li>• Billing Permissions</li> </ul>
<p>Manage and monitor the MOU upon execution.</p>	<ul style="list-style-type: none"> <li>• Train staff involved in legal compliance and hold regular trainings (at least annually).</li> <li>• Regularly assess partnerships and data for results to ensure services are improving outcomes for students' academic, social, emotional, and behavioral health needs.</li> </ul>

# Charter Schools Department

## Program Team Updates

Mefula Fairley, Executive Director  
Michelle Johnson, Ed.D, Associate Director  
Matt Daugherty, Administrator

# LCAP Feedback



Make sure the Adopted Budget, BOP, and LCFF calculator align



Follow the prompts and instructions

LCAP instructions contain how to fully respond to prompts, not just the titles of the prompts  
Baseline metrics should not contain "met" or "n/a"



Address all 8 State priorities and their approved metrics



Goal types – label goals as Broad, Focus, or Maintenance

# Annual Site Visits and Document Submission

## Single visit

- Morning site visit and file review (separate HR review)
- Afternoon virtual interviews
- January 2023 fiscal visits begin

Document submission link available on the website

Monday.com





# Teacher Credentials

- One month prior to the commencement of each new semester
- Please submit:
  - a list of the class offerings for the semester AND
  - the teacher(s) assigned to each class

# Comprehensive School Safety Plan (CSSP) Requirements

Charter Schools are required to update annually by March 1

County Offices must notify CDE of any LEA non-compliance by October 15

Requirements include:

- Plan reviewed by first responders
- Staff trained annually on components of CSSP
- Elements:
  - Child abuse reporting procedures
  - Disaster procedures
  - Suspension/expulsion procedures
  - Notification of dangerous student procedures
  - Policies (discrimination, harassment, bullying)
  - Dress code
  - Safe ingress and egress procedures
  - Safe and orderly environment
  - Tactical response to criminal incidents
  - Mental health guidelines to care for students who have witnessed a violent act



# Comprehensive School Safety Plan Training

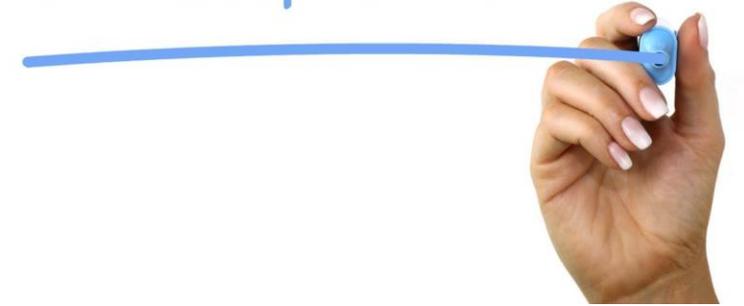
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- October 27, 2022
- 9:00-12:00 noon
- Zoom
- Cost: \$75
- Registration <https://sccoe.to/school-safety-plan>
  
- For more information Contact: Keysha Doutherd • Administrative Assistant IV • [KDoutherd@sccoe.org](mailto:KDoutherd@sccoe.org)

# Material Revisions

- If you are going to:
  - Change your educational program
  - Change your governance structure
  - Increase or decrease enrollment significantly
- It **MAY** constitute a **MATERIAL REVISION**
- If you are encountering challenges which require major changes, **PLEASE** loop us in to support you
- Plan ahead! Material revisions take time and resources

CHANGES AHEAD



# Charter School Appeals and Renewals for 2023-24

CDE Letter on Updates for Charter School Appeals and Renewals - October 13, 2022

- 2022 Dashboard will include status, not colors (performance levels)
- 2023 Dashboard projected to be available by the end of the 2023 calendar year
- The earliest release of the Performance Categories can occur is early 2024, following the release of the Dashboard

<https://www.cde.ca.gov/sp/ch/ab1505dashboard2022.asp>

# Charter School Appeals and Renewals for 2023-24 Continued

In the absence of statewide data, charter authorizers must consider clear and convincing evidence of measurable increases in academic achievement and/or strong post-secondary outcomes, demonstrated through verified data, when evaluating a petition for renewal. For all renewals under these criteria:

- Greater weight is on academic performance.
- Renewal shall be for a five-year term, if renewed.
- Use of verified data and postsecondary outcomes, which sunset on January 1, 2026.

WestEd Spring 2021 Performance on Three Locally Determined Assessments in CA:

<https://csaa.wested.org/resource/spring-2021-performance-on-three-large-locally-determined-assessments-in-california/>

# Naloxone Training Resource Guide



**YOUTH HEALTH & WELLNESS**

The Department of Youth Health & Wellness is dedicated to supporting the holistic health and well-being of all students. We provide technical assistance, education, and direct health and wellness services that:

- meet students and families where they are;
- promote partnership and collaboration between families, schools, and the community;
- increase awareness of factors that contribute to health and wellness; and
- affirm student, family, and community strengths to nurture growth,

so that students are able to thrive.

**Naloxone Training Resource Guide**



Download Toolkit PDF

 Community Schools	 School-based Wellness Centers	 Mental Health & Wellness
 Behavioral Health Systems	 Physical Health & Wellness	 Attendance Engagement



[YHW\\_Naloxone\\_Training\\_Guide\\_SEPT2022.pdf \(sccoe.org\)](#)

- To schedule an initial consultation for you or your team, complete this form: <https://forms.gle/Gq6fj9KHkobQTSSC9>
- To learn more, contact Karessa Paulino @ [kpaulino@sccoe.org](mailto:kpaulino@sccoe.org).



# Fentanyl Resources

- [www.cdph.ca.gov/StopOverdose](http://www.cdph.ca.gov/StopOverdose)
- CDPH's [Naloxone Standing Order](#)
- DHCS's [Naloxone Distribution Project](#)
- CDPH Page On [Fentanyl \(ca.gov\)](#)
- Recent News: [Rainbow Fentanyl Alert \(ca.gov\)](#)
- General Information [About Naloxone](#)
- Fresno County Webpage: [Fentanyl Danger in Fresno County | County of Fresno](#)
- Fentanyl Awareness and Prevention information (including videos developed by Fresno County) are in the latest version of SHARE, which can be found here - <https://schools.covid19.ca.gov/pages/share>
- CDPH Safe Schools Hub - <https://schools.covid19.ca.gov/>





California COVID-19  
Testing Task Force

- Public schools (districts and charter schools) and private schools can request tests for return from Thanksgiving/fall break directly from CDPH using the OTC Order Form:  
<https://labsupport.powerappsportals.us/orderotc/>
- Schools should request two tests per student and staff (test kits often have two tests per kit).
- Allocations of return from winter break OTC tests will be made available via SCCOE

# 2022-23 Charter Leader Meetings

## Save-the-Dates

- January 26, 2023
- May 18, 2023

**Meeting Location:**

Virtual

Q&A

# Charter Schools Department

## Fiscal Team Updates

Cynthia Tapia, Financial Administrator  
Shallu Sharma, Financial Administrator

# **Fiscal Crisis and Management Assistance Team (FCMAT)**

## **Fiscal Health Risk Analysis Tool**

**Robbie Montalbano, FCMAT Staff**



FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

# The Fiscal Health Risk Analysis

## Santa Clara County Office of Education

October 20, 2022

Robbie Montalbano, CFE, Intervention Specialist

# Agenda

- FCMAT Resources
- The Fiscal Health Risk Analysis (FHRA)
  - Sections
  - How the FHRA Works:
    - Required Documents
    - Completing the FHRA
    - Risk Categories
    - Scoring
  - Next Steps
- Questions and Answers

# FCMAT Resources for Charter Schools

- FCMAT has developed several resources for charter schools and authorizers to use in partnership to facilitate the oversight process:
  - Charter School Accounting and Best Practices Manual
  - Charter School Annual Oversight Checklist
  - Fiscal Health Risk Analysis (FHRA)
  - Indicators of Risk or Potential Insolvency
  - Local Control Funding Formula resources (Calculator)
  - Projection-Pro – Multiyear and cashflow projection software
  - Special Education Efficiency Tool
  - ASB Accounting Manual
  - Charter Petition Evaluation Matrix

# The Fiscal Health Risk Analysis (FHRA)

# Fiscal Health Risk Analysis (FHRA)

- FCMAT has developed a [Fiscal Health Risk Analysis \(FHRA\)](#) to evaluate a charter school's fiscal health and risk of insolvency in the current and two subsequent fiscal years
- The questions focus on known common indicators of a charter school's risk for potential insolvency or failure; each of the 19 sections and specific questions are based on FCMAT's work with charter schools. Lack of attention to these critical areas will eventually lead to a charter school's failure; the analysis focuses on essential functions and processes to determine the level of risk at the time of assessment
- The Charter School FHRA is available on the FCMAT website:
  - Go to [www.fcmat.org](http://www.fcmat.org), select the "Fiscal Tools" menu, then select "Fiscal Health Risk Analysis," then select the "Charter School Fiscal Health Risk Analysis"

# FHRA Sections

1. Annual Independent Audit Report
2. Budget Development and Adoption
3. Budget Monitoring and Updates
4. Cash Management
5. Collective Bargaining and Unrepresented Employee Agreements or Compensation Agreements
6. Contributions and Transfers
7. Deficit Spending (Unrestricted General Fund)
8. Employee Benefits
9. Enrollment and Attendance

# FHRA Sections (cont.)

10. Facilities
11. Fund Balance/Net Position and Reserve for Economic Uncertainty
12. General Fund – Current Year
13. Information Systems and Data Management
14. Internal Controls and Fraud Prevention
15. Leadership and Stability
16. Multiyear Projections
17. Debt and Risk Management
18. Position Control
19. Special Education

# How the FHRA Works

# Required Documents

- The documents below are necessary to complete the FHRA (additional documents may be required for further analysis):

Topic/ Reference	Documents <i>(additional documents may be requested as necessary when assessing FHRA questions)</i>	Related to FHRA Question(s)
<b>Enrollment &amp; Attendance</b>		
001	P-1, P-2 and annual attendance reports, for the current and prior year	9.3, 9.5, 9.7
002	Pupil Estimates for New or Significantly Expanding Charters (PENSEC)	9.1, 9.2, 9.7
003	Certified California Longitudinal Pupil Achievement Data System (CALPADS) enrollment reports (1.4 and 1.17) for the current and three prior years	9.1, 9.2, 9.3, 9.6, 9.7, 13.3, 18.5, 19.5
004	Enrollment projections used for the current budget and for the subsequent two years	9.4, 9.7, 10.3, 16.3, 18.5
005	Student attendance procedure manual, forms and memos related to student attendance, including those that address enrollment and absence tracking procedures	9.3, 9.5
006	Evidence demonstrating that student attendance data is reconciled monthly at the school site and district levels	9.3, 9.5
007	Evidence showing analysis of enrollment and average daily attendance data	9.3, 9.4
008	CALPADS processes and procedures, including evidence that school site(s) or department(s) confirmed the data, if applicable	9.8, 13.3

# Completing the FHRA

## Fiscal Health Risk Analysis for Charter Schools

Charter School:

*(Enter Charter School Name Here)*

**FCMAT**

FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

Response

### 1. Annual Independent Audit Report

- 1.1 Has the charter school corrected prior year audit findings without affecting its fiscal health (e.g., material apportionment or internal control findings)?
- 1.2 Has the independent audit report for the most recent fiscal year been completed and presented to the board within the statutory timeline?
- 1.3 Were the charter school's most recent and prior two audit reports free of findings of material weaknesses?
- 1.4 Has the charter school corrected all reported audit findings from the current and past two audits?
- 1.5 Does the audit report disclose any charter management organization (CMO) or related party transactions?

Self-assessment notes:

# Completing the FHRA (cont.)

## Fiscal Health Risk Analysis for Charter Schools



FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

Charter School:

*(Enter Charter School Name Here)*

Response

### 1. Annual Independent Audit Report

- 1.1 Has the charter school corrected prior year audit findings without affecting its fiscal health (e.g., material apportionment or internal control findings)?
- 1.2 Has the independent audit report for the most recent fiscal year been completed and presented to the board within the statutory timeline?
- 1.3 Were the charter school's most recent and prior two audit reports free of findings of material weaknesses?
- 1.4 Has the charter school corrected all reported audit findings from the current and past two audits?
- 1.5 Does the audit report disclose any charter management organization (CMO) or related party transactions?

yes  
no  
n/a

Self-assessment notes:

# Scoring

- Not all questions carry equal weight – areas of greater risk count more heavily toward or against the fiscal stability percentage. Some examples:
  - 1.1 Has the charter school corrected prior year audit findings without affecting its fiscal health (e.g., material apportionment or internal control findings)? **High risk**
  - 2.8 Does the charter school budget reflect expending restricted funds before unrestricted funds? **Moderate risk**
  - 8.5 Does the charter school track, reconcile and report employees' compensated leave balances? **Low risk**

# Scoring (cont.)

- The final scores will appear on the spreadsheet’s “Instructions and Summary” tab
- All questions must be answered for an accurate score
  - If questions are unanswered, the result will look like this:

	Score
<b>ANY CHARTER SCHOOL</b>	<b>49.0%</b>
Score Breakdown by Section:	
1. Annual Independent Audit Report	-
2. Budget Development and Adoption	-
3. Budget Monitoring and Updates	-
4. Cash Management	-
5. Collective Bargaining and Unrepresented Employee Agreements or Compensation Agreement:	-
6. Contributions and Transfers	-
7. Deficit Spending (Unrestricted General Fund)	-
8. Employee Benefits	-
9. Enrollment and Attendance	-
10. Facilities	-
11. Fund Balance/Net Position and Reserve for Economic Uncertainty	-
12. General Fund - Current Year	-
13. Information Systems and Data Management	-
14. Internal Controls and Fraud Prevention	-
15. Leadership and Stability	-
16. Multiyear Projections	-
17. Debt and Risk Management	-
18. Position Control	-
19. Special Education	-
Score	49.0%

# Scoring (cont.)

- Answering all questions will produce a score that looks like this:

	Score
<b>ANY CHARTER SCHOOL</b>	<b>49.0%</b>
Score Breakdown by Section:	
1. Annual Independent Audit Report	1.6%
2. Budget Development and Adoption	1.6%
3. Budget Monitoring and Updates	6.0%
4. Cash Management	4.6%
5. Collective Bargaining and Unrepresented Employee Agreements or Compensation Agreements:	0.0%
6. Contributions and Transfers	1.0%
7. Deficit Spending (Unrestricted General Fund)	3.0%
8. Employee Benefits	0.6%
9. Enrollment and Attendance	3.0%
10. Facilities	0.2%
11. Fund Balance/Net Position and Reserve for Economic Uncertainty	0.0%
12. General Fund - Current Year	2.2%
13. Information Systems and Data Management	1.0%
14. Internal Controls and Fraud Prevention	8.8%
15. Leadership and Stability	4.2%
16. Multiyear Projections	1.0%
17. Debt and Risk Management	1.6%
18. Position Control	5.2%
19. Special Education	3.4%
Score	49.0%

# Risk Categories

- All LEAs have risk:
  - **High risk** – 40% or higher
  - **Moderate risk** – 25% to 39%
  - **Low risk** – 24% or lower

# Next Steps

- Look at areas that have the highest risk scores
- Analyze the “no” answers and determine what can be done to change to “yes” answers
- Tackle easier areas first (e.g., adhere to deadlines)
- Plan to reassess

# Q&A

Thank you!

# Resources

- **FCMAT Charter School Fiscal Health Risk Analysis tool**
  - <https://www.fcmat.org/PublicationsReports/Charter-School-FHRA.xlsx>
- **FCMAT Fiscal Health Risk Analysis of Ross Valley Charter School (*example*)**
  - [https://www.fcmat.org/PublicationsReports/Ross\\_Valley\\_final\\_FHRA\\_revised.pdf](https://www.fcmat.org/PublicationsReports/Ross_Valley_final_FHRA_revised.pdf)
- **CDE Learning Recovery Emergency Block Grant funding results**
  - <https://www.cde.ca.gov/FG/fo/r14/lrebg22result.asp>
- **CDE Arts, Music, and Instructional Materials Discretionary Block Grant funding results**
  - <https://www.cde.ca.gov/fq/fo/r14/amimbg22res.asp>

