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For more information regarding the content of this material, please contact the Charter Schools Division by phone at 916-322-6029 or by e-mail at [charters@cde.ca.gov](mailto:charters@cde.ca.gov).

# Appendix I: Natural Resources Programs

### Natural Elements Integration

EL Education is based upon a collaborative, project based learning environment, focused on hands on activities. We would like to pursue this using the area's natural resources and active needs. For the Pinecrest area the proximity to National Forest Lands is a key part. We plan to develop learning projects, based upon State Standards, to allow students to be exposed to active, hands on learning and problem solving techniques. This program will allow and encourage collaboration from area agencies and organizations. These projects will be led by students and will be developed for age appropriate levels. Each Crew will have different responsibilities for the projects. A key component of the EL Education program is Crew, allowing for the combination of age and grade levels to work in small groups. This collaborative effort allows for increased communication skills, shared knowledge and abilities. While projects will evolve with time, some of the following partners and projects will be included initially.

**Natural Resources Management:** manage, develop, maintain and lead tours on area forest interpretive trails, through the use of private and public lands. A program will be developed with area businesses and land owners as well as the United States Forest Service. This program will allow students to develop plans for the rehabilitation, maintenance, funding, and interpretive work for area trails. They will implement their plans, prepare, arrange and be involved in the physical work and eventually lead area visitors on tours of the trails. This project will work closely with PEA staff and USFS Summit Ranger District staff.

**Fire Prevention and Fire Sciences:** Working with the Strawberry Fire District students will develop fire prevention programs for the area. These programs will be student led and will encourage evaluation of forest fuels, their management, fire prevention, evaluation and education. Working with Strawberry Fire District staff, fire fighters and board members, students will lead the projects to educate members of the public and build skills to prepare them for post secondary programs in Forestry, Agriculture and Fire Science.

**Weather and Snow Science:** Through the development of a weather station and snow lab, students will track, evaluate and study weather and snow. This program will include a study of avalanches, their science, prevention and safety. This program will utilize industry professionals and supplemental texts.

**Recreation:** Tuolumne County has become a recreation hot spot, the evaluation of this business, its impacts, fiscally and environmentally are a crucial part of its survival. Working with the Summit Ranger District, students will be exposed to land use options, criteria and processes. This component will address policies, including CEQA and NEPA and their affect on recreation users and business owners. This program will utilize the area businesses, including Pinecrest Lake Resort.

We anticipate expanding our collaborative efforts to include other local businesses, agencies and non-profit organizations.



**STRAWBERRY FIRE PROTECTION DISTRICT**  
**Strawberry Volunteer Fire Department**

PO BOX 1185, PINECREST, CA 95364  
strawberryfire85@gmail.com  
PH 209.965.3513



September 24, 2019

Heidi Lupo  
Pinecrest Expedition Academy  
PO BOX 1218  
Pinecrest, CA 95364

RE: Collaborative Curriculum

Dear Heidi:

The Strawberry Fire Protection District would be pleased to have a collaborative effort with the students and staff of the proposed Pinecrest Expedition Academy.

We would be happy to develop options for your students to lead programs geared to community education and evaluation for Fire Prevention in our area. This collaborative curriculum could encourage students and others to enter into the study of Fire Science. Community events and education symposiums, created by and led by your students with consultation and guidance from our District would be welcome and we look forward to the many opportunities this relationship could open up for the Pinecrest Expedition Academy, The Strawberry Fire District as well as the area property owners, residents and visitors.

We look forward to working with you in the near future.

Respectfully submitted,  
Dee Martin  
SFPD Board President  
[Strawberryfire85@gmail.com](mailto:Strawberryfire85@gmail.com)  
209-965-3513

## Appendix II: Draft School Calendar

# 2020 PROPOSED SCHOOL CALENDAR

The following calendar is proposed for the Pinecrest Expedition Academy. Adjustments will be made to align with other Tuolumne County Schools.

There are two days added at the end of the year as snow days, these days will be used in the event additional days need to be made up in the event of extreme weather conditions.

Pinecrest Expedition Academy  
 Appendices and Attachments

School Starts	Labor Day	Veterans Day	Thanksgiving Break	Winter Recess	MLK JR Holiday	Presidents' Day Holiday	Spring Recess	Memorial Day	Last Day	Snow Days (if needed)
8/18	9/7	11/11	11/23-11/27	12/21-1/2	1/18	2/12 & 2/15	3/29-4/2	5/31	6/4	6/7 & 6/8

Pinecrest Expedition Academy Charter Petition 2019

# Appendix V:

## Letter from Pinecrest Permittees Association

**Letter of Intent**

The purpose of this letter is to summarize some key provisions of a non-binding agreement between the parties: the Pinecrest Expedition Academy Corporation (PEAC), and the Pinecrest Permittees Association (PPA). This letter conveys the intentions of the parties to transfer certain property interests, with PEAC as the tenant and PPA as the landlord, but does not itself serve as a contract. The key provisions of this letter will then be reflected in a formal contract.

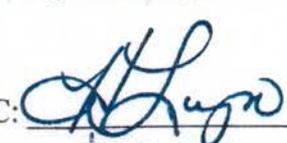
**Key Provisions**

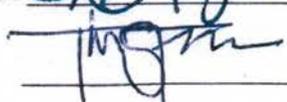
1. Rent: PEAC will pay PPA \$1500.00 (fifteen hundred dollars) per month.
2. Term of lease: Beginning July 1, 2019 for one year.
3. Option to renew: Lease may be renewed by mutual agreement at any time before expiration of the lease.
4. Description of the property: PEAC will lease the property known as Pinecrest School, encompassing the main building, and outside play and blacktop areas. PPA will have full access to portable classroom/office space and parties will share parking area. The attached exhibit depicts areas of proposed development -PPA shall have access to these areas. Language shall be further defined in negotiated lease and both parties will agree to not impede with each other's operations.
5. Contingency period: PPA will allow PEAC, at their cost, 60 (sixty) days before any formal contract is reached to conduct its due diligence, including for example: the opportunity for thorough inspection by professional building inspectors and contractors, and the exploration of, application for, and approval of all required government permits. Findings of this exploration are not binding upon the PPA for any action.

6. Responsibility for alterations, improvements, repairs, and maintenance:

PEAC: responsible for normal maintenance of the inside of the main building and of the outdoor on-site play space.

PPA: responsible for maintaining all the mechanical systems including the heating, the water supply, plumbing, and drains, including the septic system, the electrical system to the inside of the interior walls, and the outdoor premises as necessary to maintain safe and adequate space for drop-off and pickup of students and parking for staff, parents, and visitors during school hours and for scheduled school events.

9/04/18 Heidi Lupo for PEAC:  \_\_\_\_\_

9/04/18 Tim Fisher for PPA:  \_\_\_\_\_

# Appendix VII: Parent Signatures

**Signature Page for Parents**

**We the undersigned** believe that the attached Charter for the creation of the Pinecrest Expedition Academy (“Charter School”) merits consideration and hereby petition the governing board of the Twain Harte Long Barn School District to grant approval of the Charter pursuant to Education Code Section 47605 to enable the creation of the Charter School. The Petitioners for the Charter School agree to operate the Charter School pursuant to the terms of the Charter Schools Act and the provisions of the Charter School’s charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the Charter School.

**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
STEVEN CURTO	[Signature]	9.5.19	[Redacted]	[Redacted]	[Redacted]	[Redacted]
JUSTIN DECKARD	[Signature]	9-7-19				
Holly Dahl	[Signature]	9-7-19				
BRET RIMMER	[Signature]	9-19-19				
SHANNON DUSTON RIMMER	[Signature]	9-19-19				
Heidi Lupo	[Signature]	9.19.19				

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Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

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**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grades TK-8 in 2020-21	Number of children entering grades TK-8 after 2020-21
Ellen Brewer	[Signature]	4/28/19	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Eric Brewer	[Signature]	4/28/19	[Redacted]	[Redacted]	[Redacted]	[Redacted]

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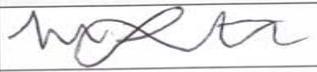
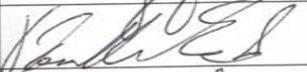
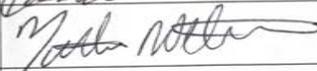
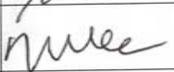
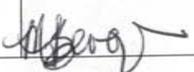
Heidi Lupo  
 Name

  
 Signature

4.30.2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Mindy Lancaster		6.6.19				
Heidi Lupo		6.6.19				
David R. Tinsley		6-21				
Kemille Eads		6/23				
Nathan Westmer		8/8/19				
Melissa Patania		8/25/19				
Maureen Bever		8/25/19				

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Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

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**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Jesse Jones	[Signature]	9/25/19	[Redacted]			
Haley Russo	Haley Russo	9/25/19				
Amy Stringer	Amy Stringer	9/25/19				
Jason Stringer	Jason Stringer	9/25/19				

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By the Lead Petitioner:

Heidi Lupo  
 Name

*[Handwritten Signature]*  
 Signature

4/15/2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Anthony Beafred	<i>[Handwritten Signature]</i>	6/5/19	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Nathan Rohr	<i>[Handwritten Signature]</i>	6/5/19				
Kara Terry	Kara Terry	6/5/19				
Katie Garcia	Katie Garcia	6/5/19				
Jonathan Garcia	<i>[Handwritten Signature]</i>	6-5-19				
Lauren Beard	Lauren Beard	6/5/19				
Jillian Rohr	Jillian Rohr	6/5/19				

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[Signature]  
 Signature

4/22/2019  
 Date

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**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Lisa D. Sedlmeyer	<u>[Signature]</u>	8/25/19				
Whitney Schlenker	<u>[Signature]</u>	8/25/19				
Cody Schlenker	<u>[Signature]</u>	8/25/19				
Dan Sedlmeyer	<u>[Signature]</u>	8/25/19				
Brian Bosque	<u>[Signature]</u>	8-27-19				
Samanth Bosque	<u>[Signature]</u>	8-27-10				
Nicole Lewis	<u>[Signature]</u>	9-1-19				



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By the Lead Petitioner:

Name Heidi Lupo

Signature [Handwritten Signature]

Date 4/22/19

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 in 2021-22
NICOLE SMITH	<u>[Handwritten Signature]</u>	9/26/19	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
CAROL C. SMITH	<u>[Handwritten Signature]</u>	9/26/19				

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By the Lead Petitioner:

Heidi Lupo  
 Name

[Signature]  
 Signature

4/15/2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Courtney Sutton	<u>[Signature]</u>	6/10/19	[REDACTED]			
Chris Sutton	<u>[Signature]</u>	11.10.19				
CHARLES HARTS	<u>[Signature]</u>	4/10/19				

# Appendix VIII

## Board Member Signed Statement and Contact Information

**STATEMENT FORMALLY APPLYING FOR APPROVAL OF CHARTER PETITION**

With our signatures below, we, the Board of Directors of Pinecrest Expedition Academy, a nonprofit public benefit corporation, hereby formally apply for approval of the charter petition to establish Pinecrest Expedition Academy, a public charter school, pursuant to Education Code Section 47600, *et seq.* This statement evidences our intent to submit the establishment charter petition to the Twain Harte School District, as well as any appeals that may be necessary.



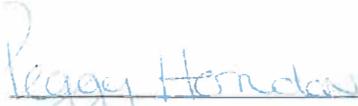
**Courtney Sutton, Board Chair**

9.30.19

**Date**

**Ron Berry, Secretary**

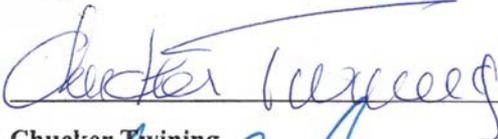
**Date**



**Peggy Herndon**

9.30.19

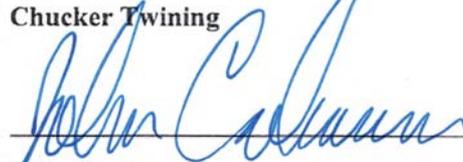
**Date**



**Chucker Twining**

9/15/2019

**Date**



**John Cashman**

9.30.19

**Date**



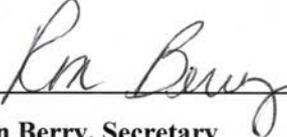
**Mike Yaley**

9 - 3 0 - 1 9

**Date**

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_____	_____
<b>Courtney Sutton, Board Chair</b>	<b>Date</b>
	<u>9.30.19</u>
<b>Ron Berry, Secretary</b>	<b>Date</b>
_____	_____
<b>Peggy Herndon</b>	<b>Date</b>
_____	_____
<b>Chucker Twining</b>	<b>Date</b>
_____	_____
<b>John Cashman</b>	<b>Date</b>
_____	_____
<b>Mike Yaley</b>	<b>Date</b>

**Pinecrest Expedition Academy Board of Directors**

**Courtney Sutton, Board Chair**

21916 Crystal Falls Dr. West  
Sonora, Ca 95370  
209-352-1434

**Ron Berry, Secretary**

1080 Winder Stock Trail  
Mesquite, NV 89034  
20-559-8899

**Mike Yaley**

12265 Sugar Plum Lane  
Columbia, Ca 95310

**Peggy Herndon**

1311 Harbor Dr.  
Waterford, Ca 95386  
209-417-9098

**John Cashman**

PO Box 1331  
Pinecrest, Ca 95364  
209-484-3271

**Chucker Twining**

PO Box 1215  
Pinecrest, Ca 95364  
209-613-1107

**Appendix IX:**  
**Supplemental Curriculum Information**  
**from EL Education**

## EL Education K-5 Language Arts Curriculum

Welcome to EL Education's new K-5 Language Arts curriculum. This introduction is designed to provide you with key information about how the curriculum is designed and built, and the principles that underlie it. It will also give you a good understanding of what makes this curriculum unique and valuable.

### Meet the students

It is 10:15 a.m. on Wednesday, and first-graders Kristina, Elvin, and Omar are hard at work building together. Over the past few weeks in their module lessons, they have spent time every day immersed in *The Most Magnificent Thing*, a rich and complex text about a girl who creates a scooter, which their teacher Ms. Sanchez reads aloud. Now, later in the morning during Labs, Ms. Sanchez helps them learn about tools, and the students work and talk together about how to use various tools and materials to try out designs.

More than a month into this module, Kristina, Elvin, and Omar are collaborating on a “magnificent thing” for their classroom—a lovely box, decorated with their original design, that will hold colored pencils for the class to use. Once the box is complete, each of them will write a paragraph, explaining how they built the magnificent thing and how to use it—and now that they are comfortable with the letters and sounds of written language and can encode them, the first graders are ready for this final supported task.

Down the hall, fourth-graders Nathan, Sergei, and Alma are working just as hard. Over many weeks, their teacher Ms. Henderson has immersed her students in a study of animal defenses and what it takes for animals to survive and thrive. She has helped her students successfully read complex texts about the topic. During her second hour of content-based literacy instruction, the Additional Language and Literacy Block, she also has ensured that students read a lot on their own about animal defenses, and she has made sure her students received much-needed explicit skills instruction and practice.

Ms. Henderson has facilitated intense conversations among her fourth-graders about what might happen to specific animals without their defenses. Dividing the students into small, heterogeneous groups, Ms. Henderson facilitated as her fourth-graders researched three specific animals. Then she gave them specific instruction on narrative writing. Now Nathan, Sergei, and Alma are about to craft choose-your-own-adventure stories about how armadillos use natural defenses to survive and thrive. And during science time, they are digging in to explore the internal and external structures of plants and animals, and how they function.

Kristina, Elvin, and Omar; Nathan, Sergei, and Alma; and all their elementary classmates have been beneficiaries of EL Education's K-5 Language Arts curriculum. Their engagement, perseverance, and mastery are a snapshot of the realized goals for all children that underlie this comprehensive literacy curriculum.

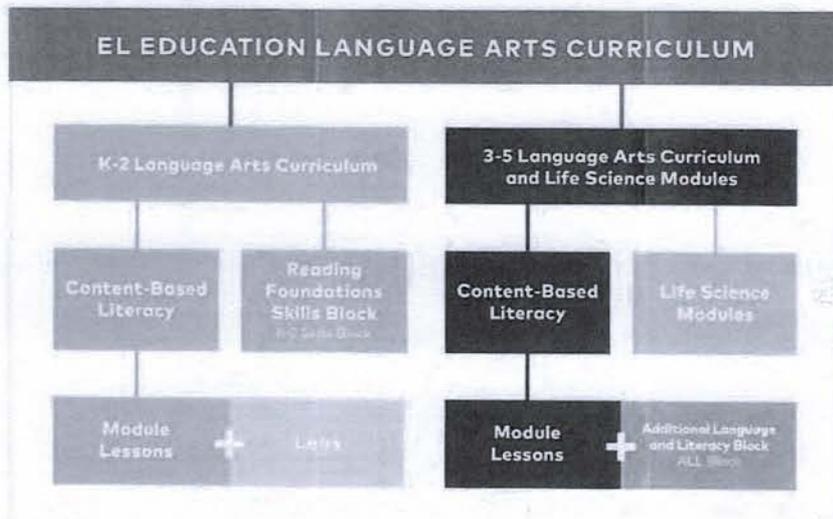
**How is the curriculum structured?**

Our K-5 curriculum offers either two or three hours of literacy instruction per day, depending on the grade level. The Grades K-2 curriculum offers two hours per day of content-based literacy (*module lessons* and *K-2 Labs*) plus one hour of structured phonics (*K-2 Reading Foundations Skills Block*). All together, these three hours of curriculum are considered comprehensive, meaning that they explicitly teach and formally assess all strands and standards of the Common Core English language arts (ELA) standards for each grade level.

The Grades 3-5 curriculum offers two hours of content-based literacy instruction per day (*module lessons* and the *Additional Language and Literacy [ALL] Block*), with an additional optional companion Life Science Module, which accompanies Module 2 for a third hour of instruction lasting eight to nine weeks. With or without the *Life Science module*, the two hours of content-based literacy are considered comprehensive.

At the heart of the curriculum, at all grade levels, are the hour-long module lessons. Each grade level includes four modules, which span a full school year. The four modules allow students to build important content knowledge based on a compelling topic related to science, social studies, or literature. Each module uses rich, authentic text throughout.

**K-2 and 3-5 Comprehensive Literacy<sup>1</sup>**

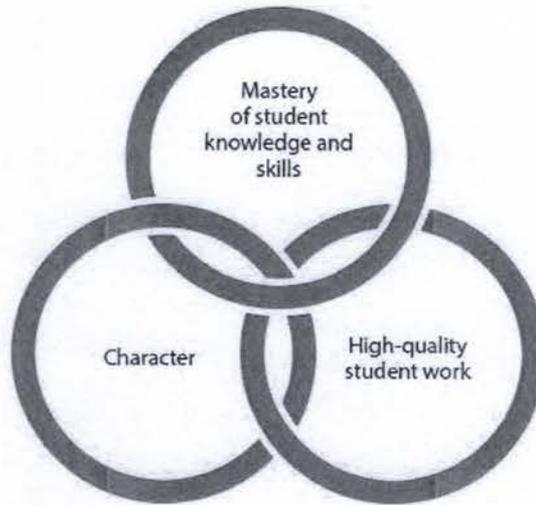


**What principles underlie the K-5 Language Arts curriculum?**

**Equity matters**

EL Education is fiercely focused on equity for all children. All children deserve schools that foster their unique abilities, give them the real opportunity to achieve high academic standards, and help them take their full place in a society for which they are well prepared when they leave school. Equity is the foundation on which the entire curriculum rests. From this foundation of equity comes what EL Education calls the Dimensions of Student Achievement.

<sup>1</sup>Each component of the curriculum is described in detail later in this document.



- **Mastery of knowledge and skills.** Students demonstrate proficiency and deeper understanding, apply their learning, think critically, and communicate clearly.
- **Character.** Students work to become effective learners, to become ethical people, and to contribute to a better world.
- **High-quality work.** Students create complex work, demonstrate craftsmanship, and create authentic work.

These three dimensions are the aspirational outcomes for the entire K-5 Language Arts curriculum. Achievement is more than mastery of knowledge and skills or students' scores on a test. Habits of character and high-quality work are also taught and prized.

#### **Substantive content matters**

Research shows that the deeper the content knowledge a student has, the more she is able to understand what she reads, and the more she is able to speak and write clearly about that content. In fact, remarkably, research shows that she is even more able to successfully read about and understand new content.

EL Education's K-5 Language Arts curriculum has been created with substantive content understanding—science, social studies, or literature—at its heart. Students acquire a deepening understanding of that content and they simultaneously acquire all the key literacy standards of reading, writing, speaking, and listening, which have been carefully embedded within the content.

#### **Curriculum is a system**

In the K-5 Language Arts curriculum the sequences of skills in the lessons have been carefully designed so that they work together to help students learn. As a whole, the curriculum is a system that benefits students while also providing support to teachers that helps them grow as professionals.

Backward design means planning with the end in mind and assessing all along the way

The guiding principle of backward design is straightforward. Designers must consider three questions:

- "At the end of a sequence of instruction, what will students know and be able to do?"
- "What will proficiency look and sound like?"
- "How will we know when students are proficient?"

An essential aspect of backward planning is assessment. In the module lessons, assessments have been built in to reflect the key literacy learning that students have been acquiring in the lessons. In the K-2 Skills Block, formative assessments happen weekly, so that teachers can group students for precise skill instruction.

In both module lessons and the K-2 Skills Block, daily lessons suggest specific “ongoing assessment.” And although the K-2 Labs and 3-5 ALL Block (each of which are a second hour of content-based literacy instruction) do not include formal assessments (these happen only in the module lessons), they do provide rich opportunities for observing student work and data collection. All of the assessments give teachers valuable information to use, both in working with the lessons and in grouping and emphasis for Labs and the ALL Block.

#### **Students excel in diverse and inclusive settings**

EL Education’s K-5 Language Arts curriculum recognizes that students learn from one another—and learn to respect one another—when they learn together in the same classroom. At the same time, students sometimes have needs that require various types of differentiation. The curriculum provides supports and resources for differentiation where needed, within all components of the curriculum: the module lessons, K-2 Labs, 3-5 ALL Block, and the critical K-2 Skills Block.

Teachers are able to provide for students with disabilities as well as students who may need academic extensions. And to engage all students, module lessons heavily emphasize differentiation; tools and scaffolding that support all learners; and flexibility in the ways information is presented, the ways students respond, and in the ways students are engaged (based on Universal Design for Learning).

#### **English language learners (ELLs) and language minority students need their assets honored and their needs supported**

ELLs and language minority students bring a wealth of diverse experience and wisdom to the classroom. In EL Education’s curriculum, these language learners are presumed to be fully participating members of a diverse and heterogeneous classroom structure. At the same time, the curriculum honors the fact that language learners need targeted instruction within each lesson and additional supports if they are to be successful.

Specific scaffolds have been integrated into each module lesson so that the classroom teacher can provide myriad supports for these students, particularly for those classified as long-term ELLs. These resources take a variety of forms. Two specific areas of emphasis are the “Language Dives” (conversations that teach students to unpack the structure and meaning of complex sentences) and “Conversation Cues” (see below).

#### **Conversation Cues promote student thinking, collaboration, and respect**

Collaborative conversation—frequent, focused, exploratory—is a key tool for deep learning. Through collaborative conversation, students deepen their learning and come to appreciate the value of one another as individuals with diverse perspectives. Conversation Cues (questions that teachers can ask, such as “Can you say more about that?” or “Can you figure out why?”) encourage productive and equitable conversation. These simple talk moves help students extend their thinking.<sup>2</sup>

#### **Students own their learning**

From the earliest grades, students using EL Education’s curriculum learn to see themselves as active learners with agency in their own education. With teachers’ guidance, they articulate specific learning targets (“I can...”) for every lesson. They learn to set goals; assess their own learning; and use feedback from peers, themselves, and their teachers to make progress.

<sup>2</sup> Conversation Cues are adapted from Michaels, Sarah and O’Connor, Cathy. *Talk Science Primer*. Cambridge, MA: TERC, 2012. [http://inquiryproject.terc.edu/shared/pd/TalkScience\\_Primer.pdf](http://inquiryproject.terc.edu/shared/pd/TalkScience_Primer.pdf). Based on Chapin, S., O’Connor, C., and Anderson, N. [2009]. *Classroom Discussions: Using Math Talk to Help Students Learn, Grades K–6*. Second Edition. Sausalito, CA: Math Solutions Publications).

### **Families and guardians are partners**

EL Education's curriculum welcomes students' families and guardians as partners in education. Students learn best when families have the opportunity to be part of the educational journey. The curriculum includes sample letters teachers can send home to describe what students will learn during a given module, how guardians can support that learning and, for Grades 3-5, specific homework assignments. Students are encouraged to share what they are learning with their family, and sometimes interview family members about their expertise and experiences.

### **Curriculum as powerful professional development**

This curriculum is designed to help teachers build on their existing expertise and continue to improve their ability to make strong instructional decisions during planning and while teaching. Teachers are provided rich resources and opportunities to make sound and specific instructional decisions based on their students' needs.

### **How does EL Education's curriculum address Common Core State Standards for literacy?**

EL Education's curriculum was created to teach the Common Core literacy standards with a fully content-integrated approach, recognizing as well that the content students acquire is itself a steppingstone to full literacy. Emphasis within the new standards includes:

#### **Reading Standards**

<b>TEXT COMPLEXITY</b>	Frequent use of grade-appropriate complex text at all grade levels for all students; at the K-2 level many close read-alouds are conducted with texts two or three grade levels above what students can read on their own to encourage high-level thinking and discourse; scaffolds so that all students are successful; Language Dives for all students (more frequent for ELLs); story time to launch every K-2 Lab session
<b>VOCABULARY</b>	Intentional vocabulary building from content-based text; attention to figuring out words from context; decoding; emphasis on academic (Tier 2) vocabulary
<b>CLOSE READING</b>	Teacher-led close reading or close read-alouds of content-based texts; carefully developed text-dependent questions; multiple reads for deepening comprehension; focus question that drives a series of sessions on a single text
<b>VOLUME OF READING</b>	Daily Accountable Independent Reading at each individual student's level (or rereading complex text previously read with teacher support); reading to deepen and expand content knowledge and vocabulary; story time to launch every K-2 Lab session
<b>RESEARCH</b>	Gathering evidence for knowledge building before writing; Accountable Independent Reading; K-2 Research Lab
<b>FLUENCY</b>	Multiple reads of complex text; research reading; volume of reading; reading decodable texts (in the K-2 Reading Foundations Skills Block)
<b>FOUNDATIONAL SKILLS</b>	A dedicated hour per day to explicitly teach the letter-sound patterns of the English language (in the K-2 Reading Foundations Skills Block)

## Writing Standards

<b>WRITING REFLECTS CONTENT UNDERSTANDING</b>	All writing supports content knowledge: Students write both as they are learning content knowledge (e.g., note-taking) and as they synthesize that knowledge (e.g., in their formal writing); note-taking in the K-2 Research Lab
<b>SPECIFIC INSTRUCTION IN ASPECTS OF WRITING</b>	Writing skills (e.g., use of introductions, transitions) and approaches (e.g., gathering evidence to support a statement) are scaffolded specifically for particular writing in each module
<b>WRITING FLUENCY, EASE WITH WRITING</b>	Frequent “short writes” as well as more developed pieces; almost daily writing in the K-2 module lessons; goal-setting and reflection in the K-2 Labs; writing practice as one specific component of the 3-5 Additional Language and Literacy Block
<b>ORAL PROCESSING OF IDEAS BEFORE WRITING</b>	Frequent opportunities for students to “orally rehearse” ideas and thinking before writing, including structured conversations and Language Dives
<b>WRITING PROCESS (PLAN, DRAFT, CONFER, REVISE, EDIT)</b>	Instruction and scaffolding in each aspect of the writing process; emphasis on use of models, critique (kind, specific, and helpful), feedback, and revision

## Language Standards

<b>STANDARD GRAMMAR AND USAGE</b>	Short and fully developed writing (including emphasis on revising and editing skills); explicit instruction on specific language standards in K-2 module lessons (often involving analyzing or punctuating songs and poems) and in 3-5 Additional Language and Literacy Block; Language Dives; embedded grammar and usage instruction (within performance tasks and often within other writing assignments)
<b>STANDARD WRITING CONVENTIONS, INCLUDING SPELLING</b>	Short and fully developed writing (including emphasis on revising and editing skills); focus on letter formation and spelling patterns in K-2 Reading Foundations Skills Block; explicit instruction on conventions in K-5 module lessons and the 3-5 Additional Language and Literacy Block (grammar, usage, and mechanics component); Language Dives
<b>ACADEMIC AND DOMAIN-SPECIFIC VOCABULARY</b>	Multiple reads of complex text; short and fully developed writing; Language Dives; unpacking learning targets; explicit teaching of the language of habits of character (e.g., collaboration, perseverance)

## Speaking and Listening Standards

<b>PARTICIPATION IN DISCUSSION, BUILDING ON OTHERS' IDEAS</b>	Collaborative protocols; small group discussion; discussion norms; Conversation Cues; sentence frames to scaffold productive discussion
<b>PRESENTATION OF IDEAS IN A STYLE APPROPRIATE TO AUDIENCE</b>	Presentation of students' work, both formally and informally, to an audience of their peers, families, or invited guests

## The K-2 Language Arts Curriculum

John Dewey, education icon, famously said, “Education is not preparation for life; education is life itself.” Our curriculum for primary learners reflects that truth. Young children live in a world of activity, exploration, creation, singing, talk, and play. These ways of living—with the encouragement of loving and supportive adults—give young learners both meaning and joy. As they move, sing, explore new ideas, make stuff, talk endlessly about what they are doing, and repeat songs and poems over and over again, primary children are learning. Our curriculum is rich and academically challenging, and it is built with what EL describes as the “Characteristics of Primary Learners” at its core:

- Young children find security in rhythm, ritual, and repetition.
- Young children learn through play.

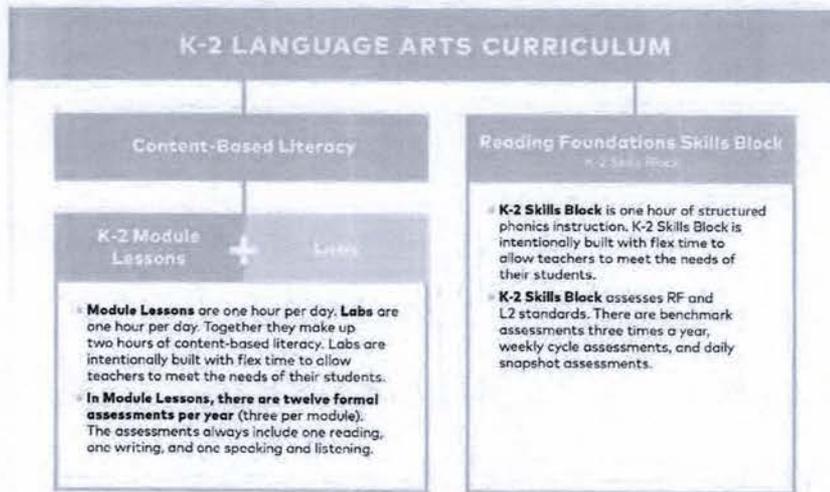
- Young children want to belong to a community that is safe, beautiful, and good.
- Young children explore the world with wonder.
- Young children “understand” the world first through their bodies.
- Young children seek independence and mastery.
- Young children thrive in the natural world.
- Young children use stories to construct meaning.
- Young children seek patterns in the world around them.
- Young children construct their identities and build cultural bridges.
- Young children express themselves in complex ways.

The K-2 curriculum offers three hours of rich literacy instruction per day:

- Two hours of content-based literacy
  - One hour of module lessons
  - One hour of Labs
- A third hour of structured phonics:
  - One hour of the K-2 Reading Foundations Skills Block (addresses the Foundational Reading standards as well as Language Standards 1 and 2)

These three hours of curriculum are considered *comprehensive*, explicitly teaching and formally assessing all strands and standards of the Common Core ELA standards for each grade level. Taken as a whole, this rigorous and joyful literacy curriculum is designed to ensure that all children have a genuine opportunity to grow and succeed.

### EL Education’s K–2 Comprehensive Literacy: Structure

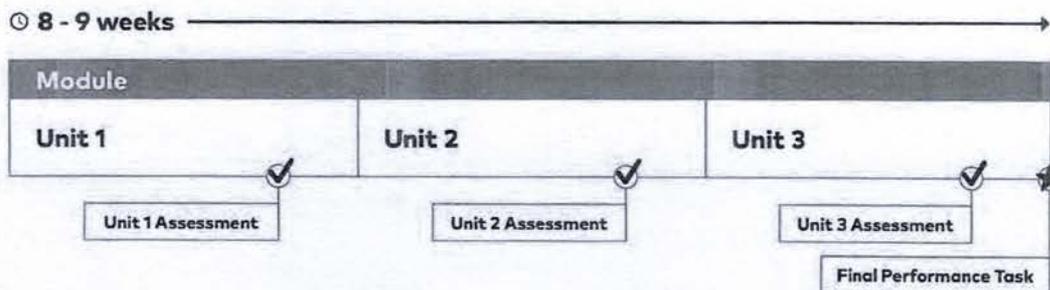


## K-2 Content-Based Literacy: Module Lessons and Labs

### The Module Lessons

Across K-5, students experience four modules over the course of a school year. In K-2, Module 1 is a bit shorter (six weeks rather than eight), so teachers have time to do the other important work of getting classroom routines and culture in place, which often takes more time and deliberate attention for primary-aged students. (Note: For more, see the “Fostering Character in a Collaborative Classroom” section of the Module 1 Appendix.) Each module has a consistent structure of three units, each of which includes one formal assessment.

### EL Education’s K-2 Language Arts: Module Lessons, Including Assessment Structure



The curriculum was built using the principles of backward design, meaning that we started by identifying what we wanted students to know and be able to do at the end of each module, and then we built each unit to intentionally get them there. Let’s explore what that means in the first grade classroom introduced in the Snapshot at the beginning of this chapter.

The last unit of each module, **Unit 3**, culminates with a performance task. This is where Kristina, Elvin, and Omar have created their “magnificent thing” and are writing about it, bringing together what they know about tools, collaboration, and perseverance (and magnificent things!).

What students learn in Units 1 and 2 helps them prepare for this performance task. (This is the principle of “backward design” in action.)

In **Unit 1**, students read, sing, discuss, dramatize, draw, and write to acquire strong content knowledge as well as the literacy skills that they need to do so. Ms. Sanchez’s first graders read informational texts to learn about lots of tools and the jobs each tool does. They learn how to ask and answer questions about the many texts they work with. They learn to collaborate and converse with one another, capturing their thinking in pictures and words.

Several weeks later, in **Unit 2**, they begin work with “close reading” of a complex text, *The Most Magnificent Thing*. In primary grades, this close reading happens through hearing the text read aloud (i.e., a close read-aloud). Ms. Sanchez uses a close read-aloud guide to conduct a series of sessions (across multiple lessons) that invite students to analyze and discuss this rich literary text. Students become deeply familiar with what a “magnificent thing” might be and what sorts of habits of character (such as perseverance) the girl in the story needed to make such a thing. Few first grade students can read the text independently, yet they all come to know it deeply, and to internalize its language, syntax, and meaning—reading comprehension at its best. During the module lessons in this unit, students also do a series of design challenges that give them hands-on experience with collaborative problem solving.

As the lessons in each unit progress, Ms. Sanchez regularly checks in on her students’ progress. Each unit has a standards-based assessment built in. Here, students read, write, or speak with increasing independence about the

texts they have been working with. These assessments help Ms. Sanchez in two ways: They allow her to have a clear sense of what her students can do and cannot yet do, and they give her valuable information about how best to use the time in the K-2 Labs for her students' benefit.

Almost every day, K-2 students share songs and poems. These serve many functions: They give students cues about transitions from activity to activity, help build a positive classroom community, build fluency, give students opportunities to practice specific language standards, and give students a deep schema for rhythm and syntax. And, they are joyful.

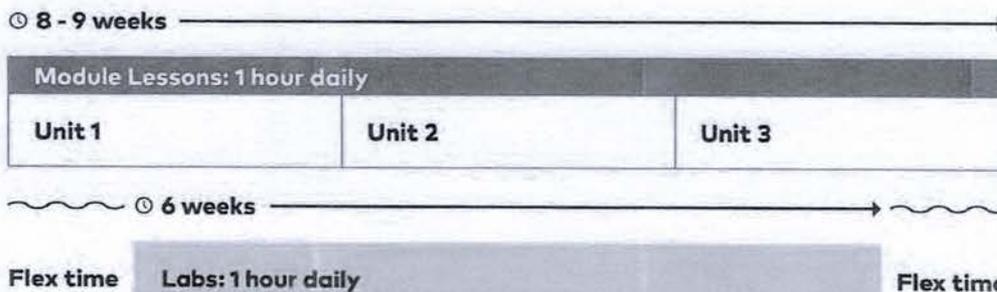
This unfolding of the three units means that by **Unit 3**, when the performance task is introduced, Kristina, Elvin, Omar, and their classmates are fully equipped to create their “magnificent things” and to synthesize their understanding of what they accomplished through supported, standards-based writing.

### The K-2 Labs

Labs are an important feature of the K-2 curriculum because they support and extend student learning from the module lessons. They are designed to help teachers ensure that all of their students get the time to play and explore, become immersed in oral language and content knowledge, and practice skills and habits of character that they need—both to live joyfully and to be fully successful and proficient.

The K-2 Labs are one hour long and are complementary to module lessons. These two hours of content-based literacy instruction work together to accelerate the achievement of all students.

#### K-2 Content-Based Literacy: Module Lessons and Labs



The K-2 Labs are designed for six weeks of instruction within an eight- to nine-week module. This design allows teachers to use their discretion to flexibly schedule the Labs to best meet the needs of their students. Teachers may choose to spend that hour during those additional two to three weeks on such things as solidifying structures and routines, providing additional “spill-over” time to support module lessons, providing additional instructional time for ELLs, or for additional explicit language instruction.

Keep in mind, this is an intentionally brief description of the Labs—for more, see the separate “Implementing the K-2 Labs” introduction to your Labs Teacher Guide and Supporting Materials book.

#### Key Features of the K-2 Module Lessons and K-2 Labs

- **Emphasis on habits of character.** Character is one of EL Education’s Three Dimensions of Student Achievement. Collaboration, perseverance, a growth mindset, and being able to set goals and then reflect on them all are key aspects of strong social-emotional learning. They are critical to student success, in school and in life.

- **Emphasis on oral language development.** Interactive, conversational immersion in oral language in the early years is critically important for children’s literacy development. Primary students build important oral language (vocabulary and syntax) and listening habits that will be key to their development of literacy. Module lessons include explicit focus on the speaking and listening standards. And the Labs provide opportunities for students to use content-specific and academic vocabulary and apply the speaking and listening skills taught in the module lessons.
- **Daily work with rich, complex text and volume of reading.** The module lessons are built around close read-alouds of complex text. In addition, each day in the K-2 Labs begins with “Story Time”—a read-aloud chosen for its relationship to the content or character focus of the Labs—so students are consistently immersed in rich, meaningful, content-connected language. This frequent work with rich text broadens content knowledge and develops students’ schema about text structure and author’s craft.
- **Daily student goal-setting and reflection.** Module lessons include learning targets, which are student-friendly “I can” statements that help students know where they are headed with their learning. Teachers help students check back in with their progress toward learning targets during lessons. Similarly, at the start of each Lab, students set personal goals. Each day at the end of Labs, they have time to reflect on their learning. As they reflect, students are developing their executive functioning skills—their ability to think about what they are doing, name it, and begin to make more intentional decisions.
- **Culminating performance task.** Unit 3 of the module lessons culminates with a student performance task. Students get support to synthesize and transfer their knowledge and understanding from the module—in terms of both content and literacy—in an authentic and often collaborative task. This is scaffolded with models, drafts, critique, and revision to lead to high-quality work.
- **Assessment.** Both summative and formative assessments are integral. In each module, three formal summative assessments are built in (one per unit). Formative “ongoing” assessment happens frequently, as teachers observe, use checklists, and give feedback to students in module lessons and Labs. There are no formal summative assessments in the K-2 Labs.

### K-2 Structured Phonics: Reading Foundations Skills Block

Our curriculum is comprehensive. The module lessons and K-2 Labs immerse primary students in content-based literacy. These two components of the curriculum complement each other to give students strong, active literacy instruction grounded in compelling topics. The K-2 Reading Foundations Skills Block gives K-2 students another hour per day of essential structured phonics instruction to help them crack the alphabetic code.

We know that in order to become fully literate, all children must acquire internalized, automatic knowledge of the building blocks of spoken and written language—letter names, sounds, and formation; the ability to break words apart and blend them back together; common spelling patterns; and decoding of words. In addition, students must develop automaticity around reading. They need to internalize predictably patterned words in context (so that the words become sight words) and smoothly and accurately read basic sentence patterns—and, increasingly, texts. Learning these building blocks of written language gives students the “mental bandwidth” to pay attention to the meaning of text and improves their reading comprehension.

The skills described in the above paragraph are the central purpose of the K-2 Reading Foundations Skills Block. It is not designed primarily for reading comprehension—that is the job of the module lessons and K-2 Labs. However, *fluency and automaticity are in fact directly related to reading comprehension*. Young students (such as the first-graders Kristina, Elvin, and Omar) who have to spend time and energy figuring out many words in a text do not have the “mental bandwidth” left to pay attention to the text’s meaning. Because the purpose of reading, after all, is comprehension, the K-2 Skills Block is designed to give students the building blocks of written language, and to help them develop fluency and automaticity in reading.

**The structure of the K-2 Reading Foundations Skills Block**

The K-2 Skills Block is organized by cycles, most of which include five lessons. Each day:

- Students spend 15–20 minutes in a “whole group” work session.
- Students spend 40–45 minutes in differentiated small groups, based on their strengths and needs.

Here, we briefly explain the purpose of the differentiated small group time. During small group time in the weekly cycle, students have regular opportunities to work with the teacher. When they are not working with the teacher, they work independently in various ways, including accountable independent reading.

These small groups are key to how the K-2 Skills Block works. They allow the teacher to tailor instruction, precisely, to the specific needs of each beginning reader, so that those students are able to progress as smoothly as possible.

Students develop foundational skills in “phases” of reading and spelling development and word acquisition. EL Education’s curriculum is designed to help teachers identify what phase each student is in and then to give students specific instruction in mastering each phase. (This framework is based on the work of Dr. Linnea Ehri, an educational psychologist who has researched how learners crack the alphabetic code.)

**Phases of Reading and Spelling Development**

Pre-Alphabetic	Partial Alphabetic	Full Alphabetic	Consolidated Alphabetic
Reader is not yet making any alphabetic connections. May recognize some letters (e.g., letters in own name) and environmental print (e.g., “Stop” on stop sign).	Reader is making partial alphabetic connections. Beginning to decode and encode CVC and VC words, but frequently confuses vowels and vowel sounds.	Reader is making full alphabetic connections. Able to decode and encode all regularly spelled, one-syllable words and some multisyllabic words.	Reader uses knowledge of syllable types to decode and encode multisyllabic words. Continually growing bank of high-frequency and irregularly spelled words.

For more details on differentiated small group time and the Phases of Reading and Spelling Development, see the “Implementing the K-2 Reading Foundations Skills Block” introduction to your Module 1 Skills Block Teacher Guide and Supporting Materials book, as well as the Phases and Microphases description found in the K-2 Skills Block Resource Manual.

**Key features of the K-2 Reading Foundations Skills Block**

- **Focus on spelling.** Decoding and encoding go hand-in-hand, each skill strengthening the other. The ability to write the letters that represent sounds in words helps the writer commit the pronunciation of the word to memory.
- **Honoring characteristics of primary learners.** Primary students learn through play and predictable routines. The K-2 Skills Block promotes a joyful, active learning environment by incorporating music, movement, stories, and use of multiple modalities.
- **Additional time and support for students who need it, including targeted re-teaching.** We know that all students do not learn at the same rate, and that some students need more time, repetition, and direct instruction than others. The differentiated small group instruction allows teachers to spend more time and provide more support to students who need it. Suggested re-teaching activities and guidance for differentiated small groups and planning are provided in each lesson.

**Note:** To implement the K-2 Skills Block, refer to your Differentiation Packs if you have identified students who need instruction above or below their grade level. These materials will support your differentiated small group.

- **Variety of student-friendly texts.** In addition to the content-related texts used in the K-2 Labs and module lessons, the K-2 Skills Block includes a variety of texts within the lessons, including poems, Letter Stories for each letter of the alphabet, fluency passages, and engaging Decodable Student Readers. To set purpose for the Decodable Student Reader, the teacher also reads aloud an “engagement” text, a complex text with an interesting story that is mirrored in the decodable text. Lastly, there is also time set aside daily for students to read texts of their choice from the classroom library.
- **Assessment.** Both summative and formative assessments are integral. The K-2 Skills Block includes three types of assessments: *benchmark assessments* (fall, winter, spring).<sup>3</sup> This gives the teacher a good sense of where her students are in terms of the alphabetic phases, described above. *Cycle assessments* serve as efficient dipsticks at the end of each week. These give the teacher more specific information to help her decide how to group students for specific small group instruction during the next cycle. There are also daily ongoing *snapshot* assessments in kindergarten and Grade 1, and Exit Tickets in Grade 2.

## The Grades 3-5 Language Arts Curriculum

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Just like primary-age students, upper-elementary students are joy seekers. They crave collaboration with their peers and engagement in their learning through play, story, and games. They also have unique needs and characteristics. Their growing hunger for independence and mastery as learners makes them ready to put their hard-earned reading and writing skills to work.

Our Grades 3-5 curriculum honors students' growing capacity to read complex text, write at length and with depth, and explore pressing issues in the world around them. The curriculum comprises two hours of rich content-based literacy instruction per day:

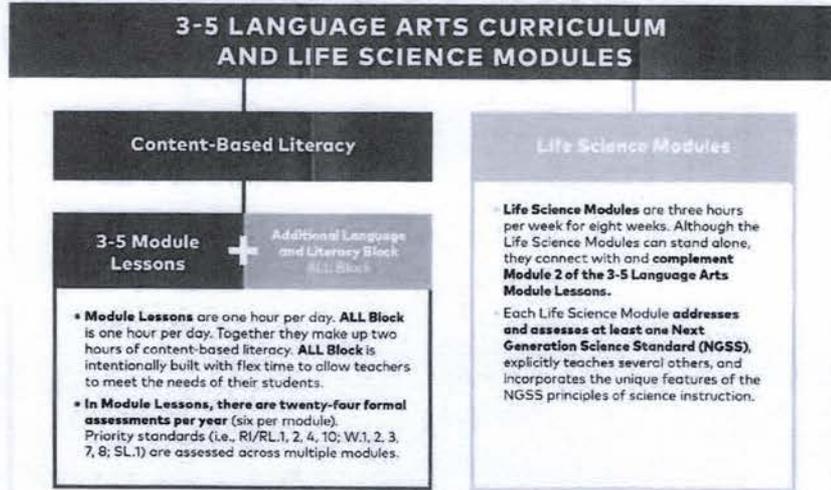
- One hour of module lessons
- One hour of the Additional Language and Literacy (ALL) Block

These two hours of curriculum are considered *comprehensive*, explicitly teaching and formally assessing all strands and standards of the Common Core ELA standards for each grade level (Note: In Grades 3-5, the initial exposure to and formal assessment of standards happens in the module lessons; the ALL Block is for additional practice.) There is also an optional companion Life Science Module that accompanies Module 2 and comprises eight weeks of instruction.

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<sup>3</sup> If teachers prefer to use existing screening or diagnostic assessments in lieu of the three benchmark assessments, that is possible, as long as they are aligned with the appropriate standards.

### 3-5 Comprehensive Literacy

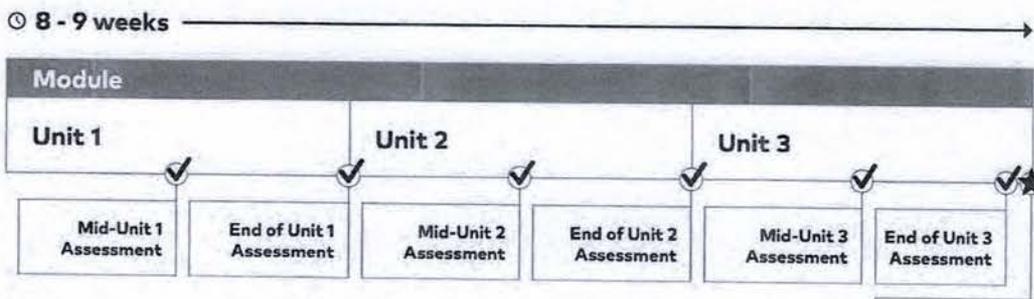


### Grades 3-5 Content-Based Literacy: Module Lessons and the Additional Language and Literacy Block

#### The Module Lessons

In many ways, the Grades 3-5 curriculum is similar to the K-2 curriculum. The modules are based on compelling topics and use rich, authentic text throughout. Divided into three units each, the modules are designed to build important content knowledge and understanding, as they fully teach and assess all of the ELA standards at each grade level. As in K-2, each module has a consistent structure of three units. But unlike K-2, in Grades 3-5 there are two assessments per unit, which reflects the readiness of students this age to do more independent work and to practice with high-stakes testing formats.

### Grades 3-5 Module Lessons and Assessment Structure



The curriculum was built using the principles of backward design, meaning that we started by identifying what we wanted students to know and be able to do at the end of each module and then built each unit to intentionally get them there. Let's explore what that means in the fourth grade classroom introduced in the Snapshot at the beginning of this document.

The last unit of each module, **Unit 3**, includes the performance task: an extended, supported writing task or presentation where students need to successfully bring together what they know about this topic. This is where students Nathan, Sergei, and Alma are writing choose-your-own-adventure narratives, bringing together what they know about the armadillo and what defenses it has to help it survive (and what they know about writing).

If this is what students need to be prepared to do in Unit 3 of the module, what they learn in Units 1 and 2 must help them get there. (This is the principle of “backward design” in action.)

In **Unit 1**, students read, discuss, dramatize, draw, and write so that they acquire strong and specific content and background knowledge, as well as the literacy skills that they need to do so. Ms. Henderson’s fourth graders learn what “natural defenses” are, they learn what predators do, and they learn about the many kinds of defenses that animals have depending on their habitat. In the process, the students learn to read closely, reread carefully for meaning, gather evidence, and develop a paragraph.

In **Unit 2**, they take this basic understanding to a deeper level. They do more research and discuss with one another what defenses specific animals might have. With close support, they respond to a prompting question to write a full multi-paragraph essay about animal defenses.

Throughout, for homework, students are reading independently at their own level. They are using research texts to gather deeper and deeper knowledge about how animals use natural defenses to survive and thrive.

As the lessons in each unit progress, Ms. Henderson has the opportunity to carefully check in on her students’ progress. Each unit has two built-in assessments: a mid-unit assessment (usually reading) and an end of unit assessment (usually writing). These assessments help Ms. Henderson in two ways: They allow her to have a clear sense of what her students can and cannot yet do, and they give her valuable information about how best to use the time in the ALL Block for her students’ benefit.

This structure and sequence means that, by **Unit 3**, Nathan, Sergei, Alma, and all of their classmates are fully equipped to write their choose-your-own adventures about how the armadillo uses its defenses to survive.

### **The Additional Language and Literacy (ALL) Block**

The ALL Block is one hour long and is complementary to module lessons. These two hours of content-based literacy instruction work together to accelerate the achievement of all students.

The ALL Block has three units, parallel to the three units of the module. Each module unit is accompanied by two weeks of ALL Block instruction (with one flex day built in every week). When a particular unit of the module lessons runs longer than two weeks, the ALL Block hour during those days that extend beyond two weeks is flex time, used to meet the specific needs of students. For example, teachers might want to provide additional time for work started in module lessons, practicing literacy skills introduced there that students are finding particularly challenging, informally assessing reading foundational skills, or offering additional time for ELLs.

**Grades 3-5 Content-Based Literacy: Module Lessons and Additional Language and Literacy Block**

⌚ **8 - 9 weeks** →

Module Lessons: 1 hour daily		
Unit 1	Unit 2	Unit 3

Additional Language and Literacy Block: 1 hour daily					
Unit 1	~Flex time~	Unit 2	~Flex time~	Unit 3	~Flex time~

⌚ **2 weeks** →

⌚ **2 weeks** →

⌚ **2 weeks** →

**The ALL Block has five components:**

- Independent Reading
- Additional Work with Complex Text
- Reading and Speaking Fluency/GUM (grammar, usage, mechanics)
- Writing Practice
- Word Study and Vocabulary

Each component is built into the module lessons in various ways, and then is reinforced and practiced in the ALL Block. Over the course of two weeks, students work with all five components.

Keep in mind, this is an intentionally brief description of the ALL Block—for more, see the “Implementing the ALL Block” introduction to your Module 1 ALL Block Teacher Guide and Supporting Materials book.

**Key Features of the Grades 3-5 Module Lessons and ALL Block**

- **Regular close reading of complex texts.** Students in Grades 3-5 consistently read complex text to gain both deeper content knowledge of the topic and deeper familiarity with the structures, syntax, and vocabulary of complex text.
- **Writing for understanding.** As students write to show understanding of particular content, they both synthesize that content and acquire transferable skills and approaches to new writing situations, becoming more independent writers.
- **Habits of character.** Character is one of EL Education’s Three Dimensions of Student Achievement. Collaboration, perseverance, a growth mindset, and being able to set goals and then reflect on them are all key aspects of strong social-emotional development and are critical to student success, in school and in life. To help students become independent learners, the 3-5 curriculum continues to build in frequent opportunities for students to collaborate and reflect on their learning.
- **Robust instruction for ELLs.** Throughout the module lessons and the ALL Block, English language learners are provided specific and differentiated instruction and support. In the module lessons, ELLs are usually part of the overall heterogeneous grouping in the class. In the ALL Block, there is a strategic mix of heterogeneous grouping as well as ELL-only grouping to meet specific needs.

- **Building knowledge and literacy skills through a volume of reading.** Students have many opportunities to read a lot on the module topic. This results in stronger vocabulary, stronger content knowledge, and greater ability to write in depth about content.
- **Daily student goal-setting and reflection.** The module lessons and the ALL Block include learning targets, which are student-friendly “I can” statements that help students know where they are headed with their learning. Teachers help students check back in with their progress during lessons.
- **Sufficient practice of skills for students to demonstrate mastery.** In both the module lessons and the ALL Block, all students receive consistent, specific, and differentiated skills practice, in both reading and writing.
- **Culminating performance task.** Unit 3 of each module culminates with a student performance task. Students get support in synthesizing and transferring their knowledge and understanding from the module, in terms of both content and literacy, in an authentic and often collaborative task. This is scaffolded with models, drafts, critique, and revision to lead to high-quality work.
- **Assessment.** Both summative and formative assessments are integral. In each module, six summative assessments are built in (two per unit). Formative assessment happens frequently as teachers observe, collect homework, use checklists, and give feedback to students in the module lessons and in the ALL Block.

## Grades 3-5 Curriculum: Life Science Modules

Our Grades 3-5 curriculum includes one optional Life Science module per grade level. If schools choose to teach this optional module, it will represent three additional hours per week of instruction but only during Module 2, which is approximately eight to nine weeks. Although the Life Science modules can stand alone, each one connects with and complements Module 2 of the grade-level language arts module lessons.

**Table 2.2: Grades 3-5 Life Science Modules**

Grade	Life Science Module
3	Diverse life cycles and inheritance of traits in aquatic plants and animals: This module extends learning about frogs from the ELA module.
4	Ecosystems and specialized structures and their functions in terrestrial plants and animals: This module is a companion to animal defenses in the ELA module.
5	The cycle of energy and matter in a healthy forest ecosystem: This module extends learning about rainforests from the ELA module.

Science is about asking questions, observing carefully, investigating, reflecting, and then drawing conclusions based on evidence. Our Life Science modules for Grades 3-5 are designed to provide teachers and students with an inquiry-based approach to rigorous and authentic science instruction.

Each Life Science module is designed to last eight weeks, with about three hours of science instruction per week. Each addresses and assesses at least one Next Generation Science Standard (NGSS), explicitly teaches several others, and incorporates the unique features of the NGSS principles of science instruction.

The Life Science modules have been designed for the elementary school generalist, such as Ms. Henderson. Each module gives the regular classroom teacher the plans, the background content, and the resources she needs to provide strong, rigorous, literacy-integrated science instruction. For the classroom teacher, the goal of our science curriculum is to recognize that science can be fun—both to learn and to teach.

### Three-Dimensional Science Instruction

The Next Generation Science Standards reflect a significant shift from earlier science instruction. Each of the NGSS standards is described in terms of a performance expectation: What should a student know and be able to do with that particular science concept at the end of instruction? In addition to naming a specific performance expectation, each science standard is described in terms of three dimensions. These three dimensions are a key structure of the NGSS and shouldn't be confused with EL Education's three Dimensions of Student Achievement.

### The Three Dimensions of the Next Generation Science Standards

Science and Engineering Practices	Disciplinary Core Ideas	Cross-Cutting Concepts
Students ask questions and define problems related to the topic. They make explanatory models and revise them as they learn more. They set up investigations, gather evidence, and make thoughtful claims supported by reasoning, both orally and in writing.	This is the actual content and information that students are learning about a topic. In the EL Education Life Science modules, the content is some aspect of life science, depending on the grade. This knowledge functions as the anchor of the module.	Students learn that there are ways of thinking and underlying "big ideas" that are not specific to a topic (or even to science) that extend across and through many topics. This includes ideas like "systems," patterns, and cause-effect relationships. They are the "glue" that holds ideas together.

### Key Features of the Grades 3-5 Life Science Modules

- **Science notebooks.** From the beginning of the module, each student keeps an interactive science notebook and uses it every day. Modeled after the way "real scientists" use notebooks, these are set up for students to include both a prompting question for the particular lesson sequence and space for students to think and work.
- **Scientists Meetings.** Scientists Meetings occur at least once a week. They give students the opportunity to translate their thinking into language in a way that can be shared with others and revisited over time. Talking about ideas allows students to reconsider and revise their developing ideas as they listen to classmates.
- **Flexible time for lessons.** Unlike the ELA components of the curriculum, which are one hour long, the time allotted for each lesson sequence of a Life Science module is flexible. The teacher is encouraged to plan science instruction on a weekly, not daily, basis, and adjust times for investigations as needed.
- **Self-coaching prompts for teachers.** Many elementary generalists may lack confidence in teaching science. Every lesson includes questions for the teacher to consider in order to help guide student inquiry, reflect on what students know and need, and anticipate classroom management needs.
- **ELA Standards.** The standards that are so central to the language arts module lessons are central to the Life Science Modules as well. Students engage in close reading of complex texts and acquire and use key academic and domain vocabulary. They discuss and process their understanding in frequent guided conversation in Scientists Meetings, and they write arguments and scientific explanations supported by accurate, reasoned evidence.

For specific information on the 3-5 Life Science Modules, see the Life Science Module Teacher Guide and Supporting Materials book.

### Additional Documents to Orient to the K-5 Language Arts Curriculum

The following pages describe other guidance documents that are crucial to have the big picture, year-long context when beginning to implement EL Education’s K-5 curriculum.

#### General Resources

<b>K-2 CURRICULUM PLAN AND 3-5 CURRICULUM PLAN</b>	High-level overviews of the recommended sequencing and pacing of topics, writing texts, and required texts for each grade. Signal key aspects of vertical alignment (K-2 and 3-5). Show the four modules per year for each grade level.
<b>K-5 GRADE-LEVEL CURRICULUM MAPS</b>	The single best source to understand the year’s work for each grade level: a detailed view of the scope and sequence of the modules showing module titles, topics, targets, and standards taught and assessed in each module.
<b>K-5 REQUIRED TRADE BOOK PROCUREMENT LIST</b>	Lists all trade books that districts must purchase to implement the modules. For each text, specifies the number of copies needed (e.g., one per classroom, six per classroom, or one per student).
<b>K-5 RECOMMENDED TEXTS AND OTHER RESOURCES</b>	Lists trade books, websites, and videos on the module topics for students to read independently in order to build content knowledge. Includes texts at a range of reading levels so teachers can differentiate.
<b>K-2 LABS SUPPLEMENTAL MATERIALS LIST</b>	Lists the physical materials needed to implement K-2 Labs. Note that schools may already have many of these materials (e.g., cardboard, paints).
<b>3-5 LIFE SCIENCE SUPPLEMENTAL MATERIALS LIST</b>	Lists the physical materials needed to implement the Grades 3-5 Life Science Modules. Note that schools may already have many of these materials (e.g., eye-droppers).
<b>FOSTERING CHARACTER IN A COLLABORATIVE CLASSROOM</b>	Describes what EL Education means by “habits of character” (e.g., perseverance, collaboration) and how the curriculum promotes social-emotional learning. Includes specific suggestions for setting up the classroom environment, structures, and culture that will help this curriculum succeed, including how teachers can lay the foundation in the first few weeks of school, before starting Module 1.
<b>SUPPORTING ENGLISH LANGUAGE LEARNERS</b>	Includes the principles of instruction for ELLs and how the curriculum structure supports the principles of ELLs’ cultural and linguistic needs.
<b>SAMPLE SCHEDULES</b>	Shows various options for scheduling the time for comprehensive literacy: three hours per day (K-2) and two hours per day (3-5). Each sample schedule states advantages and considerations.
<b>IMPLEMENTING THE K-2 LABS</b>	A description of the purpose and structure of the K-2 Labs. Describes the five Labs and explains how Labs unfold across a module. Explains what a typical Lab session looks like in action. Answers frequently asked questions.
<b>VIDEOS: PROTOCOLS WITH PRIMARY LEARNERS</b>	A suite of short online videos, each of which shows a class using a specific protocol (simple routine). These protocols actively engage all learners. They are used throughout the K-2 module lessons to help students listen to and speak about the module content. The videos demonstrate that even very young learners can succeed with protocols when given enough scaffolding and practice.
<b>WHY A STRUCTURED PHONICS PROGRAM IS EFFECTIVE, BY DAVID LIBEN</b>	A clear and thorough explanation of the research behind a structured phonics approach to reading instruction, how this approach works, and why it is effective.
<b>K-2 SKILLS BLOCK GRADE-LEVEL SCOPE AND SEQUENCE DOCUMENTS</b>	The single-best source to understand the year’s work for each grade level of the K-2 Skills Block: an overview of the specific letters, spelling patterns, and skills taught in each module throughout a school year.
<b>IMPLEMENTING THE K-2 READING FOUNDATIONS SKILLS BLOCK</b>	A simple description of the purpose and structure of the K-2 Skills Block. Describes the structure of the modules and cycles, as well as what happens during whole group instruction and differentiated small group instruction. Provides introductory information about benchmark assessments, how to group students for differentiated small group instruction, and how to use independent student rotation activities.

### General Resources

#### **K-2 READING FOUNDATIONS SKILLS BLOCK RESOURCE MANUAL**

A suite of teacher resources critical for implementing the K-2 Skills Block, including:

- Guidance documents
- Benchmark assessments (including administration and scoring guidance)
- Activity bank
- K-2 Skills Word List

#### **VIDEOS: K-2 SKILLS BLOCK - READING FOUNDATIONS INSTRUCTIONAL PRACTICES**

An online video that shows a condensed version of the full hour of the Skills Block, including whole group instruction, transitions to differentiated small group instruction, and independent rotations. In addition, we have provided a suite of several short videos, each showing a teacher using a specific instructional practice (e.g., chaining) that forms the backbone of the “cycles” of lessons in the Grade 1 Skills Block. The videos illustrate design features of the entire K-2 Skills curriculum (e.g., the relationship between spelling and reading).

#### **GRADES 3-5 IMPLEMENTING THE ADDITIONAL LANGUAGE AND LITERACY (ALL) BLOCK**

A simple description of the purpose and structure of the Grades 3-5 ALL Block. Describes the five components and the two-week cycle. Describes rotations, how to group students, and the strand for English language learners. Answers frequently asked questions.

#### **GRADES 3-5 LIFE SCIENCE GRADE-LEVEL MODULE OVERVIEWS**

Because there is just one Life Science Module per grade level (eight weeks of instruction), no yearlong guidance documents exist. Each grade-level module overview includes background information to help general education teachers build their own background knowledge about the science content (before using the module with students).

Pinecrest Expedition Academy  
 Appendices and Attachments

Pinecrest Expedition Academy  
 Budget Cash Flow - 2020-21

		July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total	Budget	Variance
Beginning Cash Balance	July 1 Cash =	-	208,929	144,864	323,755	286,555	248,757	315,016	277,354	286,353	320,599	319,618	315,641				
<b>A. REVENUES</b>																	
1. LCFF Sources																	
State Aid - Current Year	8011			-			-							-	-		
Education Protection Account (EPA) - Current Year	8012				2,496			2,496			2,496			2,496	9,984	9,984	-
State Aid - Prior Years	8019														-	-	-
Transfers to Charter Schools in Lieu of Property Taxes	8096			216,440			105,295		46,798	81,896	40,948	40,948	40,948	11,699	584,972	584,972	-
Other LCFF Transfers	8091, 8097														-	-	-
1. Total, LCFF Sources		-	-	216,440	2,496	-	105,295	2,496	46,798	81,896	43,444	40,948	40,948	14,195	594,956	594,956	-
2. Federal Revenues																	
No Child Left Behind	8290														-	-	-
Special Education - Federal	8181, 8182														-	-	-
Child Nutrition - Federal	8220				-	-	-	-	-	-	-	-	-	-	-	-	-
Other Federal Revenues															-	-	-
Title I															-	-	-
Title II															-	-	-
Title III	8110, 8260-														-	-	-
Title IV	8299														-	-	-
Title V															-	-	-
PCSGP															-	-	-
2. Total, Federal Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
3. Other State Revenues																	
Special Education - State	8311	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Child Nutrition - State	8520				-	-	-	-	-	-	-	-	-	-	-	-	-
School Facilities Apportionments	8545														-	-	-
Mandated Cost Reimbursement	8550														-	-	-
State Lottery Revenue	8560													10,183	10,183	10,183	-
ASES	8590														-	-	-
All Other State Revenues	8590														-	-	-
3. Total, Other State Revenues		-	-	-	-	-	-	-	-	-	-	-	-	10,183	10,183	10,183	-
4. Other Local Revenues																	
Food Service Sales	8634														-	-	-
All Other Sales	8639														-	-	-
Interest	8660														-	-	-
Donations	8682														-	-	-
All Other Fees and Contracts	8689														-	-	-
All Other Local Revenues	8699														-	-	-
4. Total, Local Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5. TOTAL REVENUES		-	-	216,440	2,496	-	105,295	2,496	46,798	81,896	43,444	40,948	40,948	24,378	605,139	605,139	-
<b>B. EXPENDITURES</b>																	



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Approved Textbooks and Core Curricula Materials	4100		15,600												15,600	15,600	-
Books and Other Reference Materials	4200		1,040	1,040		1,040	1,040		1,040						5,200	5,200	-
Materials and Supplies	4300	217	217	217	217	217	217		217	217	217	217	217		2,600	2,600	-
Noncapitalized Equipment	4400	1,950			1,950				3,900						7,800	7,800	-
Food	4700		1,797	1,797	1,797	1,797	1,797	1,797	1,797	1,797	1,797	1,797	1,797		17,971	17,971	-
4. Books and Supplies	4000-4999	2,167	18,654	3,054	3,964	3,054	3,054	5,914	3,054	2,014	2,014	2,014	217	-	49,171	49,171	-
5. Services and Other Operating Expenditures																	
Subagreements for Services	5100														-	-	-
Travel	5210				1,487		1,487				2,975				5,950	5,950	-
Conference, Convention, Meeting	5220		447	447	447	447	447	447	447	447	447	447			4,475	4,475	-
Field Trip	5240		208	208	208	208	208	208	208	208	208	208			2,080	2,080	-
Dues and Memberships	5300	292	292	292	292	292	292	292	292	292	292	292	292		3,500	3,500	-
Insurance	5400		868	868	868	868	868	868	868	868	868	868	868		10,412	10,412	-
Operations and Housekeeping Services	5500	744	744	744	744	744	744	744	744	744	744	744	744	868	8,924	8,924	-
Rent	5610	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500		18,000	18,000	-
Utilities	5620	300	300	300	300	300	300	300	300	300	300	300	300		3,600	3,600	-
Repairs	5640		180	180	180	180	180	180	180	180	180	180			1,800	1,800	-
Other Services & Operating Expenses	5800		500	500	500	500	500	500	500	500	500	500			5,000	5,000	-
Accounting	5810	625	625	625	625	625	625	625	625	625	625	625	625		7,500	7,500	-
Business Services	5813	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000		48,000	48,000	-
Bank Charges	5815		42	42	42	42	42	42	42	42	42	42	42		420	420	-
Education Consultants	5817		-	-	-	-	-	-	-	-	-	-	-		-	-	-
Legal	5830	10,000		250			250			250			250		11,000	11,000	-
Professional Development	5840		500			500			500				500		2,000	2,000	-
Substitute Teachers (Third Party Vendors)	5851		-	-	-	-	-	-	-	-	-	-	-		-	-	-
Contract Labor	5852														-	-	-
Special Education Encroachment	5869		4,084	4,084	4,084	4,084	4,084	4,084	4,084	4,084	4,084	4,084	4,084		44,928	44,928	-
Special Education Services	5872		-	-	-	-	-	-	-	-	-	-	-		-	-	-
Communications	5900	20	20	20	20	20	20	20	20	20	20	20	20		240	240	-
5. Services and Other Operating Expenditures	5000-5999	17,480	14,310	14,060	15,297	14,310	15,547	13,810	14,310	17,035	13,810	14,310	12,682	868	177,828	177,828	-
6. Capital Outlay																	
(Objects 6100-6170, 6200-6500 modified accrual basis only)																	
Land and Land Improvements	6100-6170														-	-	-
Buildings and Improvements of Buildings	6200														-	-	-
Books and Media for New School Libraries or Major Expansion of School Libraries	6300		2,500												2,500	2,500	-
Equipment	6400														-	-	-
Equipment Replacement	6500														-	-	-
Depreciation Expense (for full accrual only)	6900														-	-	-
6. Capital Outlay	6000-6599	-	2,500	-	-	-	-	-	-	-	-	-	-	-	2,500	2,500	-
7. Other Outgo																	
Tuition to Other Schools	7110-7143														-	-	-
Transfers of Pass-through Revenues to Other LEAs	7211-7213														-	-	-
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE														-	-	-
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO														-	-	-
All Other Transfers	7281-7299														-	-	-
Debt Service:															-	-	-
Interest	7438			166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67		1,000	1,000	-



Pinecrest Expedition Academy  
 Appendices and Attachments

Budget Cash Flow - 2021-22

Beginning Cash Balance	July 1 Cash =	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total	Budget	Variance
<b>A. REVENUES</b>																	
1. LCFF Sources																	
State Aid - Current Year	8011	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Education Protection Account (EPA) - Current Year	8012				2,736			2,736			2,736			2,736	10,944	10,944	-
State Aid - Prior Years	8019														-	-	-
Transfers to Charter Schools in Lieu of Property Taxes	8096	38,473	76,946	51,298	51,298	51,298	51,298	51,298	51,298	89,771	44,885	44,885	44,885	44,885	641,219	641,219	-
Other LCFF Transfers	8091, 8097														-	-	-
<b>1. Total, LCFF Sources</b>		<b>-</b>	<b>38,473</b>	<b>76,946</b>	<b>54,034</b>	<b>51,298</b>	<b>51,298</b>	<b>54,034</b>	<b>51,298</b>	<b>89,771</b>	<b>47,621</b>	<b>44,885</b>	<b>44,885</b>	<b>47,621</b>	<b>652,163</b>	<b>652,163</b>	<b>-</b>
2. Federal Revenues																	
No Child Left Behind	8290														-	-	-
Special Education - Federal	8181, 8182														-	-	-
Child Nutrition - Federal	8220														-	-	-
Other Federal Revenues															-	-	-
Title I															-	-	-
Title II															-	-	-
Title III															-	-	-
Title IV															-	-	-
Title V															-	-	-
PCSGP															-	-	-
<b>2. Total, Federal Revenues</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
3. Other State Revenues																	
Special Education - State	8311	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Child Nutrition - State	8520														-	-	-
School Facilities Apportionments	8545														-	-	-
Mandated Cost Reimbursement	8550					892									892	892	-
State Lottery Revenue	8560						2,791			2,791			2,791	2,791	11,163	11,163	-
ASES	8590														-	-	-
All Other State Revenues	8590														-	-	-
<b>3. Total, Other State Revenues</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>892</b>	<b>2,791</b>	<b>-</b>	<b>-</b>	<b>2,791</b>	<b>-</b>	<b>-</b>	<b>2,791</b>	<b>2,791</b>	<b>12,054</b>	<b>12,054</b>	<b>-</b>
4. Other Local Revenues																	
Food Service Sales	8634														-	-	-
All Other Sales	8639														-	-	-
Interest	8660														-	-	-
Donations	8682														-	-	-
All Other Fees and Contracts	8689														-	-	-
All Other Local Revenues	8699														-	-	-
<b>4. Total, Local Revenues</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>5. TOTAL REVENUES</b>		<b>-</b>	<b>38,473</b>	<b>76,946</b>	<b>54,034</b>	<b>52,189</b>	<b>54,088</b>	<b>54,034</b>	<b>51,298</b>	<b>92,561</b>	<b>47,621</b>	<b>44,885</b>	<b>47,676</b>	<b>50,412</b>	<b>664,217</b>	<b>664,217</b>	<b>-</b>
<b>B. EXPENDITURES</b>																	



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Appendices and Attachments

Approved Textbooks and Core Curricula Materials	4100		2,050.00			1,025.00			1,025.00					4,100	4,100	-
Books and Other Reference Materials	4200		620.00	620.00	310.00	310.00		310.00		310.00			310.00	3,100	3,100	-
Materials and Supplies	4300	713	712.50	712.50	712.50	712.50	712.50	712.50	712.50	712.50	712.50	712.50	712.50	8,550	8,550	-
Noncapitalized Equipment	4400		1,675.00	1,675.00										3,350	3,350	-
Food	4700		1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	1,969.92	19,699	19,699	-
4. Books and Supplies	4000-4999	713	7,027.42	4,977.42	2,992.42	4,017.42	2,992.42	2,682.42	4,017.42	2,682.42	2,992.42	2,682.42	1,022.50	38,799	38,799	-
5. Services and Other Operating Expenditures																
Subagreements for Services	5100													-	-	-
Travel	5210				1,561.76		1,561.76			3,123.52				6,247	6,247	-
Conference, Convention, Meeting	5220		469.85	469.85	469.85	469.85	469.85	469.85	469.85	469.85	469.85	469.85	469.85	4,699	4,699	-
Field Trip	5240		250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	2,500	2,500	-
Dues and Memberships	5300	306	306.25	306.25	306.25	306.25	306.25	306.25	306.25	306.25	306.25	306.25	306.25	3,675	3,675	-
Insurance	5400		951.07	951.07	951.07	951.07	951.07	951.07	951.07	951.07	951.07	951.07	951.07	11,413	11,413	-
Operations and Housekeeping Services	5500	815	815.20	815.20	815.20	815.20	815.20	815.20	815.20	815.20	815.20	815.20	815.20	9,782	9,782	-
Rent	5610	1,575	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	1,575.00	18,900	18,900	-
Utilities	5620	315	315.00	315.00	315.00	315.00	315.00	315.00	315.00	315.00	315.00	315.00	315.00	3,780	3,780	-
Repairs	5640		189.00	189.00	189.00	189.00	189.00	189.00	189.00	189.00	189.00	189.00	189.00	1,890	1,890	-
Other Services & Operating Expenses	5800		550.00	550.00	550.00	550.00	550.00	550.00	550.00	550.00	550.00	550.00	550.00	5,500	5,500	-
Accounting	5810	656	656.25	656.25	656.25	656.25	656.25	656.25	656.25	656.25	656.25	656.25	656.25	7,875	7,875	-
Business Services	5813	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	48,000	48,000	-
Bank Charges	5815		44.10	44.10	44.10	44.10	44.10	44.10	44.10	44.10	44.10	44.10	44.10	441	441	-
Education Consultants	5817		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Legal	5830			262.50			262.50			262.50			262.50	1,050	1,050	-
Professional Development	5840		525.00			525.00			525.00			525.00		2,100	2,100	-
Substitute Teachers (Third Party Vendors)	5851		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Contract Labor	5852													-	-	-
Special Education Encroachment	5869		4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	4,477.09	49,248	49,248	-
Special Education Services	5872		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Communications	5900	21	21	21	21	21	21	21	21	21	21	21	21	252	252	-
5. Services and Other Operating Expenditures	5000-5999	7,689	15,145	14,882	16,182	15,145	16,444	14,620	15,145	18,006	14,620	15,145	13,379	951	177,352	177,352
6. Capital Outlay																
(Objects 6100-6170, 6200-6500 modified accrual basis only)																
Land and Land Improvements	6100-6170													-	-	-
Buildings and Improvements of Buildings	6200													-	-	-
Books and Media for New School Libraries or Major Expansion of School Libraries	6300		5,000											5,000	5,000	-
Equipment	6400		2,500											2,500	2,500	-
Equipment Replacement	6500													-	-	-
Depreciation Expense (for full accrual only)	6900													-	-	-
6. Capital Outlay	6000-6599	-	7,500	-	-	-	-	-	-	-	-	-	-	7,500	7,500	-
7. Other Outgo																
Tuition to Other Schools	7110-7143													-	-	-
Transfers of Pass-through Revenues to Other LEAs	7211-7213													-	-	-
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE													-	-	-
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO													-	-	-
All Other Transfers	7281-7299													-	-	-
Debt Service:														-	-	-
Interest	7438			166.67	167	167	167	167	167	-	-	-	-	1,000	1,000	-

Pinecrest Expedition Academy  
 Appendices and Attachments

Principal	7439			-	-	-	-	-	-	-	-	-	-	-	-	-	-	
District Oversight Fee	7500													6,522	6,522	6,522	-	
7. Other Outgo	7100-7299			167	167	167	167	167	167	-	-	-	-	6,522	7,522	7,522	-	
8. TOTAL EXPENDITURES				31,050	59,625	49,979	49,293	49,282	49,556	47,422	49,282	50,641	47,565	47,780	44,355	7,473	583,302	583,302
C. Operating Cash Flow				(31,050)	(21,152)	26,967	4,740	2,907	4,532	6,612	2,016	41,920	56	(2,895)	3,321	42,939	80,916	80,916
D. OTHER FINANCING SOURCES / USES																		
1. Other Sources	8930-8979																	
2. Less: Other Uses	7630-7699			50,000													50,000	50,000
E. PRIOR YEAR TRANSACTIONS																		
1. ACCOUNTS RECEIVABLE				24,378														
2. PREPAID EXPENDITURES																		
3. ACCOUNTS PAYABLE				13,067														
4. LOANS PAYABLE																		
NET PRIOR YEAR TRANSACTIONS				11,311	-	-	-	-	-	-	-	-	-	-	-	-	-	-
F. ENDING CASH BALANCE				295,350	224,198	251,165	255,905	258,813	263,345	269,957	271,973	313,893	313,950	311,055	314,376			

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Budget Cash Flow - 2022-23

Beginning Cash Balance	July 1 Cash =	July	August	September	October	November	December	January	February	March	April	May	June	Accrued	Total	Budget	Variance
<b>A. REVENUES</b>																	
1. LCFF Sources																	
State Aid - Current Year	8011	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Education Protection Account (EPA) - Current Year	8012				3,120			3,120			3,120			3,120	12,480	12,480	-
State Aid - Prior Years	8019														-	-	-
Transfers to Charter Schools in Lieu of Property Taxes	8096		43,873	87,746	58,497	58,497	58,497	58,497	58,497	102,370	51,185	51,185	51,185	51,185	731,215	731,215	-
Other LCFF Transfers	8091, 8097														-	-	-
<b>1. Total, LCFF Sources</b>		-	43,873	87,746	61,617	58,497	58,497	61,617	58,497	102,370	54,305	51,185	51,185	54,305	743,695	743,695	-
2. Federal Revenues																	
No Child Left Behind	8290														-	-	-
Special Education - Federal	8181, 8182														-	-	-
Child Nutrition - Federal	8220														-	-	-
Other Federal Revenues															-	-	-
Title I															-	-	-
Title II															-	-	-
Title III	8110, 8260-														-	-	-
Title IV	8299														-	-	-
Title V															-	-	-
PCSGP															-	-	-
<b>2. Total, Federal Revenues</b>		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
3. Other State Revenues																	
Special Education - State	8311	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Child Nutrition - State	8520														-	-	-
School Facilities Apportionments	8545														-	-	-
Mandated Cost Reimbursement	8550					1,008									1,008	1,008	-
State Lottery Revenue	8560						3,182			3,182			3,182	3,182	12,730	12,730	-
ASES	8590														-	-	-
All Other State Revenues	8590														-	-	-
<b>3. Total, Other State Revenues</b>		-	-	-	-	1,008	3,182	-	-	3,182	-	-	3,182	3,182	13,738	13,738	-
4. Other Local Revenues																	
Food Service Sales	8634														-	-	-
All Other Sales	8639														-	-	-
Interest	8660														-	-	-
Donations	8682														-	-	-
All Other Fees and Contracts	8689														-	-	-
All Other Local Revenues	8699														-	-	-
<b>4. Total, Local Revenues</b>		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>5. TOTAL REVENUES</b>		-	43,873	87,746	61,617	59,505	61,680	61,617	58,497	105,553	54,305	51,185	54,367	57,487	757,433	757,433	-
<b>B. EXPENDITURES</b>																	



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Approved Textbooks and Core Curricula Materials	4100		2,625.00			1,312.50			1,312.50					5,250	5,250	-
Books and Other Reference Materials	4200		730.00	730.00	365.00	365.00	365.00		365.00		365.00		365.00	3,650	3,650	-
Materials and Supplies	4300	813	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	9,750	9,750	-
Noncapitalized Equipment	4400		2,025.00	2,025.00										4,050	4,050	-
Food	4700		2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	22,464	22,464	-
4. Books and Supplies	4000-4999	813	8,438.90	5,813.90	3,423.90	4,736.40	3,423.90	3,058.90	4,736.40	3,058.90	3,423.90	3,058.90	1,177.50	45,164	45,164	-
5. Services and Other Operating Expenditures																
Subagreements for Services	5100													-	-	-
Travel	5210				1,639.85		1,639.85			3,279.69				6,559	6,559	-
Conference, Convention, Meeting	5220		493.34	493.34	493.34	493.34	493.34	493.34	493.34	493.34	493.34	493.34	493.34	4,933	4,933	-
Field Trip	5240		300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	3,000	3,000	-
Dues and Memberships	5300	322	321.56	321.56	321.56	321.56	321.56	321.56	321.56	321.56	321.56	321.56	321.56	3,859	3,859	-
Insurance	5400		1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	13,015	13,015	-
Operations and Housekeeping Services	5500	930	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	11,155	11,155	-
Rent	5610	1,654	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	1,653.75	19,845	19,845	-
Utilities	5620	331	330.75	330.75	330.75	330.75	330.75	330.75	330.75	330.75	330.75	330.75	330.75	3,969	3,969	-
Repairs	5640		198.45	198.45	198.45	198.45	198.45	198.45	198.45	198.45	198.45	198.45	198.45	1,985	1,985	-
Other Services & Operating Expenses	5800		605.00	605.00	605.00	605.00	605.00	605.00	605.00	605.00	605.00	605.00	605.00	6,050	6,050	-
Accounting	5810	689	689.06	689.06	689.06	689.06	689.06	689.06	689.06	689.06	689.06	689.06	689.06	8,269	8,269	-
Business Services	5813	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	54,000	54,000	-
Bank Charges	5815		46.31	46.31	46.31	46.31	46.31	46.31	46.31	46.31	46.31	46.31	46.31	463	463	-
Education Consultants	5817		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Legal	5830			275.63			275.63			275.63			275.63	1,103	1,103	-
Professional Development	5840		801.25			801.25			801.25			801.25		3,205	3,205	-
Substitute Teachers (Third Party Vendors)	5851		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Contract Labor	5852													-	-	-
Special Education Encroachment	5869		5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	56,160	56,160	-
Special Education Services	5872		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Communications	5900	22	22	22	22	22	22	22	22	22	22	22	22	265	265	-
5. Services and Other Operating Expenditures	5000-5999	8,447	17,081	16,556	17,920	17,081	18,195	16,280	17,081	19,835	16,280	17,081	14,912	1,085	197,834	197,834
6. Capital Outlay																
(Objects 6100-6170, 6200-6500 modified accrual basis only)																
Land and Land Improvements	6100-6170													-	-	-
Buildings and Improvements of Buildings	6200													-	-	-
Books and Media for New School Libraries or Major Expansion of School Libraries	6300		10,000											10,000	10,000	-
Equipment	6400	5,000												5,000	5,000	-
Equipment Replacement	6500													-	-	-
Depreciation Expense (for full accrual only)	6900													-	-	-
6. Capital Outlay	6000-6599	5,000	10,000	-	-	-	-	-	-	-	-	-	-	15,000	15,000	-
7. Other Outgo																
Tuition to Other Schools	7110-7143													-	-	-
Transfers of Pass-through Revenues to Other LEAs	7211-7213													-	-	-
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE													-	-	-
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO													-	-	-
All Other Transfers	7281-7299													-	-	-
Debt Service:														-	-	-
Interest	7438			166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	1,000	1,000	0



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Special Education - State	8311	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Child Nutrition - State	8520	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
School Facilities Apportionments	8545	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mandated Cost Reimbursement	8550	-	-	-	1,149	-	-	-	-	-	-	-	-	1,149	1,149	-	-
State Lottery Revenue	8560	-	-	-	-	3,182	-	-	3,182	-	-	3,182	3,182	12,730	12,730	-	-
ASES	8590	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Other State Revenues	8590	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
3. Total, Other State Revenues		-	-	-	1,149	3,182	-	-	3,182	-	-	3,182	3,182	13,879	13,879	-	-
4. Other Local Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service Sales	8634	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Other Sales	8639	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Interest	8660	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Donations	8682	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Other Fees and Contracts	8689	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Other Local Revenues	8699	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4. Total, Local Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5. TOTAL REVENUES		-	43,873	87,746	61,617	59,647	61,680	61,617	58,497	105,553	54,305	51,185	54,367	57,487	757,574	757,574	-
<b>B. EXPENDITURES</b>																	
1. Certificated Salaries		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Certificated Teachers' Salaries	1100	9,849	9,849	9,849	9,849	9,849	9,849	9,849	9,849	9,849	9,849	9,849	9,849	-	118,189	118,189	-
Certificated Stipends	1101	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Certificated Pupil Support Salaries	1200	-	298	298	298	298	298	298	298	298	298	298	298	-	3,278	3,278	-
Certificated Supervisors' and Administrators' Salaries	1300	-	7,450	7,450	7,450	7,450	7,450	7,450	7,450	7,450	7,450	7,450	7,450	-	81,955	81,955	-
Certificated Bonuses	1400	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Certificated Salaries	1900	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
1. Certificated Salaries	1000-1999	9,849	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	17,597.54	-	203,422	203,422	-
2. Non-certificated Salaries		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Non-certificated Instructional Aides' Salaries	2100	656	656	656	656	656	656	656	656	656	656	656	656	-	7,868	7,868	-
Non-certificated Support Salaries	2200	1,311	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	1,311.27	-	15,735	15,735	-
Non-certificated Supervisors' and Administrators' Sal.	2300	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clerical and Office Salaries	2400	4,098	4,098	4,098	4,098	4,098	4,098	4,098	4,098	4,098	4,098	4,098	4,098	-	49,173	49,173	-
Non-certificated Bonuses	2600	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Non-certificated Salaries	2900	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Non-certificated Substitute	2935	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
2. Non-certificated Salaries	2000-2999	6,065	6,065	6,065	6,065	6,065	6,065	6,065	6,065	6,065	6,065	6,065	6,065	-	72,776	72,776	-
3. Employee Benefits		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
State Teachers' Retirement System, certificated positions	3101	3,068	3,068	3,068	3,068	3,068	3,068	3,068	3,068	3,068	3,068	3,068	3,068	-	36,819.39	36,819	-
State Teachers' Retirement System, classified positions	3102	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Public Employees' Retirement System, certificated positions	3201	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Public Employees' Retirement System, classified positions	3202	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
OASDI/Medicare/Alternative, certificated positions	3301	246	246	246	246	246	246	246	246	246	246	246	246	-	2,949.62	2,950	-
OASDI/Medicare/Alternative, classified positions	3302	464	464	464	464	464	464	464	464	464	464	464	464	-	5,567.33	5,567	-
Health & Welfare Benefits, certificated positions	3401	1,794	1,794	1,794	1,794	1,794	1,794	1,794	1,794	1,794	1,794	1,794	1,794	-	21,531.83	21,532	-

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Health & Welfare Benefits, classified positions	3402	1,158	1,158	1,158	1,158	1,158	1,158	1,158	1,158	1,158	1,158	1,158	1,158	13,891.50	13,892	-	
State Unemployment Insurance, certificated positions	3501	848	848	848	848	848	848	848	848	848	848	848	848	10,171.10	10,171	-	
State Unemployment Insurance, classified positions	3502	303	303	303	303	303	303	303	303	303	303	303	303	3,638.78	3,639	-	
State Employment Training Tax, certificated positions	3511	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
State Employment Training Tax, classified positions	3512	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Workers' Compensation Insurance, certificated positions	3601	254	254	254	254	254	254	254	254	254	254	254	254	3,051.33	3,051	-	
Workers' Compensation Insurance, classified positions	3602	91	91	91	91	91	91	91	91	91	91	91	91	1,091.63	1,092	-	
OPEB, Allocated, certificated positions	3701													-	-	-	
OPEB, Allocated, classified positions	3702													-	-	-	
OPEB, Active Employees, certificated positions	3751													-	-	-	
OPEB, Active Employees, classified positions	3752													-	-	-	
PERS Reduction, certificated positions	3801													-	-	-	
PERS Reduction, classified positions	3802													-	-	-	
Other Benefits, certificated positions	3901													-	-	-	
Other Benefits, classified positions	3902													-	-	-	
Employee benefits - not pension	3998													-	-	-	
Employer Paid Taxes	3999													-	-	-	
3. Employee Benefits	3000-3999	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	8,226.04	-	98,712.52	98,713	-
4. Books and Supplies																	
Approved Textbooks and Core Curricula Materials	4100		1,625.00			812.50			812.50						3,250	3,250	-
Books and Other Reference Materials	4200		650.00	650.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00		3,250	3,250	-
Materials and Supplies	4300	813	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50	812.50		9,750	9,750	-
Noncapitalized Equipment	4400		1,625.00	1,625.00											3,250	3,250	-
Food	4700		2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40	2,246.40		22,464	22,464	-
4. Books and Supplies	4000-4999	813	6,958.90	5,333.90	3,383.90	4,196.40	3,383.90	3,058.90	4,196.40	3,058.90	3,383.90	3,058.90	1,137.50	-	41,964	41,964	-
5. Services and Other Operating Expenditures																	
Subagreements for Services	5100														-	-	-
Travel	5210				1,721.84		1,721.84			3,443.68					6,887	6,887	-
Conference, Convention, Meeting	5220		518.01	518.01	518.01	518.01	518.01	518.01	518.01	518.01	518.01	518.01	518.01		5,180	5,180	-
Field Trip	5240		340.00	340.00	340.00	340.00	340.00	340.00	340.00	340.00	340.00	340.00	340.00		3,400	3,400	-
Dues and Memberships	5300	338	337.64	337.64	337.64	337.64	337.64	337.64	337.64	337.64	337.64	337.64	337.64		4,052	4,052	-
Insurance	5400		1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	1,084.56	13,015	13,015	-
Operations and Housekeeping Services	5500	930	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62	929.62		11,155	11,155	-
Rent	5610	1,736	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44	1,736.44		20,837	20,837	-
Utilities	5620	347	347.29	347.29	347.29	347.29	347.29	347.29	347.29	347.29	347.29	347.29	347.29		4,167	4,167	-
Repairs	5640		208.37	208.37	208.37	208.37	208.37	208.37	208.37	208.37	208.37	208.37	208.37		2,084	2,084	-
Other Services & Operating Expenses	5800		665.50	665.50	665.50	665.50	665.50	665.50	665.50	665.50	665.50	665.50	665.50		6,655	6,655	-
Accounting	5810	724	723.52	723.52	723.52	723.52	723.52	723.52	723.52	723.52	723.52	723.52	723.52		8,682	8,682	-
Business Services	5813	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500		54,000	54,000	-
Bank Charges	5815		48.62	48.62	48.62	48.62	48.62	48.62	48.62	48.62	48.62	48.62	48.62		486	486	-
Education Consultants	5817		-	-	-	-	-	-	-	-	-	-	-		-	-	-
Legal	5830			289.41			289.41			289.41			289.41		1,158	1,158	-
Professional Development	5840		841.31			841.31			841.31			841.31			3,365	3,365	-
Substitute Teachers (Third Party Vendors)	5851		-	-	-	-	-	-	-	-	-	-	-		-	-	-
Contract Labor	5852														-	-	-
Special Education Encroachment	5869		5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45	5,105.45		56,160	56,160	-
Special Education Services	5872		-	-	-	-	-	-	-	-	-	-	-		-	-	-



Pinecrest Expedition Academy  
 Appendices and Attachments

State Aid - Current Year	8011	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Education Protection Account (EPA) - Current Year	8012			3,120			3,120			3,120			3,120	12,480	12,480		
State Aid - Prior Years	8019																
Transfers to Charter Schools in Lieu of Property Taxes	8096		43,873	87,746	58,497	58,497	58,497	58,497	58,497	102,370	51,185	51,185	51,185	51,185	731,215	731,215	
Other LCFF Transfers	8091, 8097																
1. Total, LCFF Sources		-	43,873	87,746	61,617	58,497	61,617	58,497	102,370	54,305	51,185	51,185	54,305	743,695	743,695		
2. Federal Revenues																	
No Child Left Behind	8290																
Special Education - Federal	8181, 8182																
Child Nutrition - Federal	8220																
Other Federal Revenues																	
Title I																	
Title II																	
Title III																	
Title IV																	
Title V																	
PCSGP																	
2. Total, Federal Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
3. Other State Revenues																	
Special Education - State	8311	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Child Nutrition - State	8520																
School Facilities Apportionments	8545																
Mandated Cost Reimbursement	8550				1,149									1,149	1,149		
State Lottery Revenue	8560					3,182			3,182			3,182	3,182	12,730	12,730		
ASES	8590																
All Other State Revenues	8590																
3. Total, Other State Revenues		-	-	-	1,149	3,182	-	-	3,182	-	-	3,182	3,182	13,879	13,879		
4. Other Local Revenues																	
Food Service Sales	8634																
All Other Sales	8639																
Interest	8660																
Donations	8682																
All Other Fees and Contracts	8689																
All Other Local Revenues	8699																
4. Total, Local Revenues		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
5. TOTAL REVENUES		-	43,873	87,746	61,617	59,647	61,680	61,617	58,497	105,553	54,305	51,185	54,367	57,487	757,574	757,574	
B. EXPENDITURES																	
1. Certificated Salaries																	
Certificated Teachers' Salaries	1100	10,145	10,145	10,145	10,145	10,145	10,145	10,145	10,145	10,145	10,145	10,145	10,145	-	121,735	121,735	
Certificated Stipends	1101																
Certificated Pupil Support Salaries	1200		307	307	307	307	307	307	307	307	307	307	307		3,377	3,377	
Certificated Supervisors' and Administrators' Salaries	1300		7,674	7,674	7,674	7,674	7,674	7,674	7,674	7,674	7,674	7,674	7,674		84,413	84,413	
Certificated Bonuses	1400																
Other Certificated Salaries	1900																
1. Certificated Salaries	1000-1999	10,145	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	18,125.47	-	209,525	209,525	





Pinecrest Expedition Academy  
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D. OTHER FINANCING SOURCES / USES																			
1. Other Sources	8930-8979																		-
2. Less: Other Uses	7630-7699																		-
E. PRIOR YEAR TRANSACTIONS																			
1. ACCOUNTS RECEIVABLE		57,487																	
2. PREPAID EXPENDITURES																			
3. ACCOUNTS PAYABLE		8,522																	
4. LOANS PAYABLE																			
NET PRIOR YEAR TRANSACTIONS		48,966	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
F. ENDING CASH BALANCE		501,187	487,192	519,358	525,841	530,215	536,457	545,072	548,297	597,095	598,241	595,458	600,534						

# Pinecrest Expedition Academy Appendices and Attachments

**Pinecrest Expedition Academy**  
Multi-Year Projection

This charter school uses the following basis of accounting:

- Accrual Basis (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)**
- Modified Accrual Basis (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)**

Description	Object Code	2020-21	2021-22	2022-23	2023-24	2024-25	Assumptions
<b>A. REVENUES</b>							
<b>1. LCFF Sources</b>							
State Aid - Current Year	8011	-	-			-	
Education Protection Account (EPA) - Current Year	8012	9,984.00	10,944.00	12,480.00	12,480.00	12,480.00	
State Aid - Prior Years	8019						
Transfers to Charter Schools in Lieu of Property Taxes	8096	584,972.00	641,219.00	731,215.00	731,215.00	731,215.00	Based on 2018-19 P-2 Property Taxes Rate (\$11,718.19 per ADA)
Other LCFF Transfers	8091, 8097	-	-			-	
Total, LCFF Sources		594,956.00	652,163.00	743,695.00	743,695.00	743,695.00	
<b>2. Federal Revenues</b>							
No Child Left Behind	8290	-	-			-	
Special Education - Federal	8181, 8182	-	-	-	-	-	
Child Nutrition - Federal	8220	-	-			-	
Other Federal Revenues		-	-			-	
Title I		-	-			-	
Title II		-	-			-	
Title III	8110, 8260-8299	-	-			-	
Title IV		-	-			-	
Title V		-	-			-	
PCSGP		-	-			-	
Total, Federal Revenues		-	-	-	-	-	
<b>3. Other State Revenues</b>							
Special Education - State	8311	-	-	-	-	-	
Child Nutrition - State	8520	-	-			-	
School Facilities Apportionments	8545	-	-			-	
Mandated Cost Reimbursement	8550	-	891.57	1,007.94	1,149.41	1,149.41	\$17.86 for 2021-22 school year, \$18.42 for last of years
State Lottery Revenue	8560	10,182.68	11,162.88	12,729.60	12,729.60	12,729.60	\$151/ADA base , \$53/ADA prop 20
ASES	8590	-	-			-	
All Other State Revenues	8590	-	-			-	
Total, Other State Revenues		10,182.68	12,054.45	13,737.54	13,879.01	13,879.01	
<b>4. Other Local Revenues</b>							
Food Service Sales	8634	-	-			-	
All Other Sales	8639	-	-			-	
Interest	8660	-	-			-	
Donations	8682	-	-			-	
All Other Fees and Contracts	8689	-	-			-	
All Other Local Revenues	8699	-	-			-	
Total, Local Revenues		-	-			-	
<b>5. TOTAL REVENUES</b>		605,138.68	664,217.45	757,432.54	757,574.01	757,574.01	
<b>B. EXPENDITURES</b>							
<b>1. Certificated Salaries</b>							
Certificated Teachers' Salaries	1100	108,160.00	111,404.80	114,746.94	118,189.35	121,735.03	Projected salary increase based on historical data, plus 2-5% COLA
Certificated Stipends	1101						

Pinecrest Expedition Academy  
Appendices and Attachments

Certificated Pupil Support Salaries	1200	3,000.00	3,090.00	3,182.70	3,278.18	3,376.53	
Certificated Supervisors' and Administrators' Salaries	1300	75,000.00	77,250.00	79,567.50	81,954.53	84,413.16	
Certificated Bonuses	1400	-	-	-	-	-	
Other Certificated Salaries	1900	-	-	-	-	-	
Total, Certificated Salaries		186,160.00	191,744.80	197,497.14	203,422.06	209,524.72	
<b>2. Non-certificated Salaries</b>							
Non-certificated Instructional Aides' Salaries	2100	7,200.00	7,416.00	7,638.48	7,867.63	8,103.66	Projected salary increase based on historical data, plus 2-5% COLA
Non-certificated Support Salaries	2200	14,400.00	14,832.00	15,276.96	15,735.27	16,207.33	
Non-certificated Supervisors' and Administrators' Sal.	2300	-	-	-	-	-	
Clerical and Office Salaries	2400	45,000.00	46,350.00	47,740.50	49,172.72	50,647.90	
Non-certificated Bonuses	2600	-	-	-	-	-	
Other Non-certificated Salaries	2900	-	-	-	-	-	
Other Non-certificated Substitute	2935	-	-	-	-	-	
Total, Non-certificated Salaries		66,600.00	68,598.00	70,655.94	72,775.62	74,958.89	
<b>3. Employee Benefits</b>							
State Teachers' Retirement System, certificated positions	3101	33,694.96	34,705.81	35,746.98	36,819.39	37,923.97	Based on CALSTRS rate increase projections - STRS (18.1%)
State Teachers' Retirement System, classified positions	3102	-	-	-	-	-	
Public Employees' Retirement System, certificated	3201	-	-	-	-	-	Assumes 5% benefits premium increase annually
Public Employees' Retirement System, classified	3202	-	-	-	-	-	
OASDI/Medicare/Alternative, certificated positions	3301	2,699.32	2,780.30	2,863.71	2,949.62	3,038.11	
OASDI/Medicare/Alternative, classified positions	3302	5,094.90	5,247.75	5,405.18	5,567.33	5,734.36	
Health & Welfare Benefits, certificated positions	3401	18,600.00	19,530.00	20,506.50	21,531.83	22,608.42	
Health & Welfare Benefits, classified positions	3402	12,000.00	12,600.00	13,230.00	13,891.50	14,586.08	
State Unemployment Insurance, certificated positions	3501	-	-	-	-	-	
State Unemployment Insurance, classified positions	3502	9,308.00	9,587.24	9,874.86	10,171.10	10,476.24	
State Employment Training Tax, certificated positions	3511	3,330.00	3,429.90	3,532.80	3,638.78	3,747.94	
State Employment Training Tax, classified positions	3512	-	-	-	-	-	
Workers' Compensation Insurance, certificated positions	3601	-	-	-	-	-	
Workers' Compensation Insurance, classified positions	3602	3,537.04	2,876.17	2,962.46	3,051.33	3,142.87	
OPEB, Allocated, certificated positions	3701	-	-	-	-	-	
OPEB, Allocated, classified positions	3702	-	-	-	-	-	
OPEB, Active Employees, certificated positions	3751	-	-	-	-	-	
OPEB, Active Employees, classified positions	3752	-	-	-	-	-	
PERS Reduction, certificated positions	3801	-	-	-	-	-	
PERS Reduction, classified positions	3802	-	-	-	-	-	
Other Benefits, certificated positions	3901	-	-	-	-	-	
Other Benefits, classified positions	3902	-	-	-	-	-	
Employee benefits - not pension	3998	-	-	-	-	-	
Employer Paid Taxes	3999	-	-	-	-	-	
Total, Employee Benefits		89,529.62	91,786.14	95,182.32	98,712.52	102,382.36	
<b>4. Books and Supplies</b>							
Approved Textbooks and Core Curricula Materials	4100	15,600.00	4,100.00	5,250.00	3,250.00	3,250.00	\$300 per student, \$50 replace cost per student
Books and Other Reference Materials	4200	5,200.00	3,100.00	3,650.00	3,250.00	3,250.00	\$100 per student, \$50 replace cost per student
Materials and Supplies	4300	2,600.00	8,550.00	9,750.00	9,750.00	9,750.00	\$150 per student
Noncapitalized Equipment	4400	7,800.00	3,350.00	4,050.00	3,250.00	3,250.00	\$150 per student, \$50 replace cost per student
Food	4700	17,971.20	19,699.20	22,464.00	22,464.00	22,464.00	\$2 per pupil for 180 days
Total, Books and Supplies		49,171.20	38,799.20	45,164.00	41,964.00	41,964.00	
<b>5. Services and Other Operating Expenditures</b>							
Subagreements for Services	5100	-	-	-	-	-	
Travel	5210	5,949.56	6,247.04	6,559.39	6,887.36	7,231.73	5% Increase
Conference, Convention, Meeting	5220	4,474.78	4,698.52	4,933.44	5,180.12	5,439.12	5% Increase
Field Trip	5240	2,080.00	2,500.00	3,000.00	3,400.00	3,800.00	\$50 per student

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Dues and Memberships	5300	3,500.00	3,675.00	3,858.75	4,051.69	4,254.27	5% Increase
Insurance	5400	10,411.73	11,412.85	13,014.66	13,014.66	13,014.66	5% Increase
Operations and Housekeeping Services	5500	8,924.34	9,782.45	11,155.43	11,155.43	11,155.43	5% Increase
Rent	5610	18,000.00	18,900.00	19,845.00	20,837.25	21,879.11	\$3,000 per month in the first year, and increase 5% per year after all.
Utilities	5620	3,600.00	3,780.00	3,969.00	4,167.45	4,375.82	20% of Rent Expenses
Repairs	5640	1,800.00	1,890.00	1,984.50	2,083.73	2,187.91	10% of Rant Expenses
Other Services & Operating Expenses	5800	5,000.00	5,500.00	6,050.00	6,655.00	7,320.50	10% Increase
Accounting	5810	7,500.00	7,875.00	8,268.75	8,682.19	9,116.30	5% Increase
Business Services	5813	48,000.00	48,000.00	54,000.00	54,000.00	54,000.00	Based on Contact Amount
Bank Charges	5815	420.00	441.00	463.05	486.20	510.51	5% Increase
Education Consultants	5817	-	-	-	-	-	
Legal	5830	11,000.00	1,050.00	1,102.50	1,157.63	1,215.51	Extra \$8,000 in first year for Charter Petition process, increase 5% after
Professional Development	5840	2,000.00	2,100.00	3,205.00	3,365.25	4,533.51	5% Increase, Additional \$1,000 for additional teacher
Substitute Teachers (Third Party Vendors)	5851	-	-	-	-	-	
Contract Labor	5852	-	-	-	-	-	
Special Education Encroachment	5869	44,928.00	49,248.00	56,160.00	56,160.00	56,160.00	\$900 per ADA
Special Education Services	5872	-	-	-	-	-	
Communications	5900	240.00	252.00	264.60	277.83	291.72	5% Increase
Total, Services and Other Operating Expenditures		177,828.41	177,351.85	197,834.07	201,561.77	206,486.11	
<b>6. Capital Outlay</b>							
<i>(Objects 6100-6170, 6200-6500 modified accrual basis only)</i>							
Land and Land Improvements	6100-6170	-	-	-	-	-	
Buildings and Improvements of Buildings	6200	-	-	-	-	-	
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	2,500.00	5,000.00	10,000.00	10,000.00	10,000.00	Library Books and other need in three years
Equipment	6400	-	2,500.00	5,000.00	5,000.00	5,000.00	Most of equipments for the classroom is already placed.
Equipment Replacement	6500	-	-	-	-	-	
<i>Depreciation Expense (for full accrual only)</i>	6900	-	-	-	-	-	
Total, Capital Outlay		2,500.00	7,500.00	15,000.00	15,000.00	15,000.00	
<b>7. Other Outgo</b>							
Tuition to Other Schools	7110-7143	-	-	-	-	-	
Transfers of Pass-through Revenues to Other LEAs	7211-7213	-	-	-	-	-	
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	-	
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	-	
All Other Transfers	7281-7299	-	-	-	-	-	
Debt Service:							
Interest	7438	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	
Principal	7439	-	-	-	-	-	
District Oversight Fee	7500	5,949.56	6,521.63	7,436.95	7,436.95	7,436.95	Assumes 1% of local control
Total, Other Outgo		6,949.56	7,521.63	8,436.95	8,436.95	8,436.95	
<b>8. TOTAL EXPENDITURES</b>		578,738.79	583,301.62	629,770.42	641,872.92	658,753.03	
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		26,399.89	80,915.83	127,662.12	115,701.09	98,820.98	
<b>D. OTHER FINANCING SOURCES / USES</b>							
1. Other Sources	8930-8979	250,000.00	-	-	-	-	
2. Less: Other Uses	7630-7699	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	-	-	-	-	-	
4. TOTAL OTHER FINANCING SOURCES / USES		200,000.00	(50,000.00)	(50,000.00)	(50,000.00)	(50,000.00)	
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		226,399.89	30,915.83	77,662.12	65,701.09	48,820.98	
<b>F. FUND BALANCE, RESERVES</b>							

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1. Beginning Fund Balance							
a. As of July 1	9791	-	226,399.89	257,315.72	334,977.84	400,678.92	
b. Adjustments for Unaudited Actuals	9,792	-	-			-	
c. Adjustments for Audit or Restatements	9793, 9795	-	-			-	
2. Ending Fund Balance, June 30 (E + F.1.c.)		226,399.89	257,315.72	334,977.84	400,678.92	449,499.90	
Components of Ending Fund Balance (Optional):							
Nonspendable Revolving Cash (equals object 9130)	9711	-	-			-	
Nonspendable Stores (equals object 9320)	9712	-	-			-	
Nonspendable Prepaid Expenditures (equals object 9330)	9713	-	-			-	
Nonspendable All Others	9719	-	-			-	
Restricted Fund Balance	9740	-	-			-	
Committed Fund Balance	9750, 9760	-	-			-	
Assigned Fund Balance	9780	-	-			-	
Reserve for Economic Uncertainties	9789	28,936.94	29,165.08	31,488.52	32,093.65	32,937.65	5% reserve
Undesignated/Unappropriated Amount	9790	197,462.95	228,150.64	303,489.31	368,585.28	416,562.25	

Pinecrest Expedition Academy  
 Appendices and Attachments

Pinecrest Expedition Academy - Pinecrest Budget											7/1/19					
EDUCATION PROTECTION ACCOUNT																
Certification:																
	P-2	P-2	P-2	P-2	P-2	P-2	Est. Annual	Est. Annual								
	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2017-18	2018-19	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	
<b>EDUCATION PROTECTION ACCOUNT (EPA) MINIMUM ENTITLEMENT</b>																
(C)	A-1 Total ADA for EPA Minimum	-	-	-	-	-	-	-	-	-	49.92	54.72	62.40	62.40	62.40	
-	A-2 Minimum Funding per ADA	-	-	-	-	-	-	-	-	-	200	200	200	200	200	
(F)	A-3 EPA Minimum Funding (A-1 * A-2)	200	200	200	200	200	200	200	200	9,984	10,944	12,480	12,480	12,480		
<b>EPA PROPORTIONATE SHARE CAP</b>																
Adjusted Total Revenue Limit																
Current Year Adjusted NSS Allowance																
(A)	B-1 Adjusted Revenue Limit/Adjusted General Purpose Funding for EPA	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
(B)	B-2 Local Revenue/In-lieu of Property Taxes	-	-	-	-	-	-	-	-	584,972	641,219	731,215	731,215	731,215		
(D)	B-3 EPA Proportionate Share Cap (B-1 - B-2; if less than 0, B-3 = 0)	-	-	-	-	-	-	-	-	-	-	-	-	-		
<b>EPA PROPORTIONATE SHARE</b>																
(A)	C-1 Adjusted Revenue Limit/Adjusted General Purpose Funding for EPA	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
-	C-2 Statewide EPA Proportionate Share Ratio (as of P-2 certification)	21.03170000%	26.66368816%	25.71573613%	24.75704809%	0.00000000%	N/A	28.56249995%	N/A	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.40866962%	
(E)	C-3 EPA Proportionate Share (C-1 * C-2)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
<b>EPA ENTITLEMENT</b>																
(G), (H)	D-1 EPA Entitlement (if C-3 < B-3, then C-3, else greater of A-3 or B-3)	-	-	-	-	-	-	-	-	9,984	10,944	12,480	12,480	12,480		
-	D-2 Miscellaneous Adjustments**	-	-	-	-	-	-	-	-	-	-	-	-	-		
Adj. (H)	D-3 Adjusted EPA Entitlement (D-1 + D-2)	-	-	-	-	-	-	-	-	9,984	10,944	12,480	12,480	12,480		
(I)	D-4 Prior Year Annual Adjustment	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
(J)	D-5 P2 Entitlement Net of PY Adjustment	-	-	-	-	-	N/A	N/A	-	9,984	10,944	12,480	12,480	12,480		
-	C-2 Statewide EPA Proportionate Share Ratio (as of Annual certification)	21.51650000%	21.12293943%	26.76692016%	25.92116080%	24.89424756%	25.89051467%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	28.56249995%	
-	Adjusted EPA Allocation (used to calculate LCFF Revenue)	-	-	-	-	-	N/A	N/A	-	9,984	10,944	12,480	12,480	12,480		
<b>Calculation of Net State Aid before Minimum State Aid</b>																
-	Phase-In Entitlement	-	-	-	-	-	N/A	N/A	-	485,274	542,843	630,489	630,641	632,830		
-	Less Property Taxes/In-Lieu	-	-	-	-	-	N/A	N/A	-	584,972	641,219	731,215	731,215	731,215		
-	Gross State Aid	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	Less EPA Allocation	-	-	-	-	-	N/A	N/A	-	9,984	10,944	12,480	12,480	12,480		
-	Net State Aid	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
<b>Minimum State Aid</b>																
-	Adjusted Total Revenue Limit	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	2012-13 Delimited NSS Allowance	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	Less Property Taxes/In-Lieu	-	-	-	-	-	N/A	N/A	-	584,972	641,219	731,215	731,215	731,215		
-	Less EPA Allocation	-	-	-	-	-	N/A	N/A	-	9,984	10,944	12,480	12,480	12,480		
-	Revenue Limit Minimum State Aid	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	Categorical Minimum State Aid	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	Minimum State Aid Guarantee	-	-	-	-	-	N/A	N/A	-	-	-	-	-	-		
-	Charter School Minimum State Aid Offset (effective 2014-15)	-	-	-	-	-	N/A	N/A	-	(584,972)	(641,219)	(731,215)	(731,215)	(731,215)		
<b>LCFF State Aid</b>																
-	EPA in Excess to LCFF Funding	-	-	-	-	-	N/A	N/A	-	9,984	10,944	12,480	12,480	12,480		

USER NOTES

\*\*A miscellaneous adjustment increases EPA State Aid (object 8012) funding in lieu of issuing an invoice to an LEA when it is overpaid. EPA State Aid offsets LCFF State Aid (object 8011). It is calculated a single time at P2.

<b>BUDGET REPORT ASSUMPTIONS</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>
<b>Projected Enrollment</b>					
Grades K-3	23	24	27	27	27
Grades 4-6	19	21	23	23	23
Grades 7-8	10	12	15	15	15
Total Enrollment	52	57	65	65	65
Percent Change Over Prior Year	--	9.62%	14.04%	0.00%	0.00%
<b>Projected P-2 ADA</b>					
Grades K-3	22.08	23.04	25.92	25.92	25.92
Grades 4-6	18.24	20.16	22.08	22.08	22.08
Grades 7-8	9.60	11.52	14.40	14.40	14.40
Total ADA	49.92	54.72	62.40	62.40	62.40
Percent Change Over Prior Year	--	9.62%	14.04%	0.00%	0.00%
<b>ADA to Enrollment Ratio</b>	<b>0.96</b>	<b>0.96</b>	<b>0.96</b>	<b>0.96</b>	<b>0.96</b>
<b>Revenue Funding Rates (Per ADA)</b>					
Mandated Cost Reimbursement	17.37	17.86	18.42	18.42	18.42
Lottery (Prop 20)	53	53	53	53	53
Lottery (Non-Prop 20)	151	151	151	151	151
<b>Other Major Revenue Assumptions</b>	None				
<b>Staffing</b>					
Number of Teachers (FTE)	3.00	3.00	3.00	3.00	3.00
Average Teacher Cost (Salary and Benefits)	72,104	74,267	76,495	78,790	81,154
Health and Welfare Cost per Employee	11,338	11,822	12,328	12,857	13,409
<b>Classroom Staffing Ratio</b>					
Students per FTE	17.33	19.00	21.67	21.67	21.67
<b>Benefits</b>					
CalSTRS Employer Rate	18.10%	18.10%	18.10%	18.10%	18.10%
<b>Facilities</b>					
Rent/Lease	18,000	18,900	19,845	20,837	21,879
Utilities	3,600	3,780	3,969	4,167	4,376
Repairs	1,800	1,890	1,985	2,084	2,188
<b>Administrative Service Agreements</b>					
Oversight Fees to Authorizer (1 or 3 percent)	1%	1%	1%	1%	1%
Authorizer Oversight Annual Fee	5,950	6,522	7,437	7,437	7,437
<b>Other Major Expenditure Assumptions</b>	None				

SALARY POSITIONS ASSUMPTION	2020-21	2021-22	2022-23	2023-24	2023-24
<b>Positions (FTE)</b>					
Certificated Teacher	2.10	2.10	2.10	2.10	2.10
Lead Teacher/Principal	1.00	1.00	1.00	1.00	1.00
Instructional Aide	0.33	0.33	0.33	0.33	0.33
Office Manager	1.00	1.00	1.00	1.00	1.00
Food Service	0.33	0.33	0.33	0.33	0.33
Secretary	0.34	0.34	0.34	0.34	0.34
	5.10	5.10	5.10	5.10	5.10
Medical Benefits Eligibility (Cert)	3.00	3.00	3.00	3.00	3.00
Medical Benefits Eligibility (Class)	2.00	2.00	2.00	2.00	2.00

**Pinecrest Expedition Academy**  
**Enrollment & ADA Projections**

Enrollment

	2020-21	2021-22	2022-23	2023-24	2024-25
TK-3	23	24	27	27	27
4-6	19	21	23	23	23
7-8	10	12	15	15	15
	<b>52</b>	<b>57</b>	<b>65</b>	<b>65</b>	<b>65</b>

Average Daily Attendance

0.96

	2020-21	2021-22	2022-23	2023-24	2024-25
TK-3	22.08	23.04	25.92	25.92	25.92
4-6	18.24	20.16	22.08	22.08	22.08
7-8	9.6	11.52	14.4	14.4	14.4
	<b>49.92</b>	<b>54.72</b>	<b>62.40</b>	<b>62.40</b>	<b>62.40</b>

**Budget Narratives**  
 Pinecrest Expedition Academy

The following budget narratives has been prepared for Pinecrest Expedition Academy (PEA). In order to develop an accurate financial projection for the duration of 5 years of the charter, fiscal information and LCFF tools from School Services of California (SSC), Fiscal Crisis & Management Assistance Team (FCMAT), and California charter school fiscal benchmark report has been used. In addition, this budget narrative reflects the most up-to-date information available in regards to the cost-of-living adjustment (COLA), Consumer Price Index (CPI), and Local Control Funding Formula (LCFF).

**Assumptions**

**1.1 Enrollment**

The following enumerates grade span enrollment figures projected during the 5 year term of the charter:

	2020-21	2021-22	2022-23	2023-24	2024-25
TK-3	23	24	27	27	27
4-6	19	21	23	23	23
7-8	10	12	15	15	15
	<b>52</b>	<b>57</b>	<b>65</b>	<b>65</b>	<b>65</b>

**1.2 Average Daily Attendance**

Based on these enrollment figures, Average Daily Attendance (ADA) has been conservatively estimated at 0.96 percent, which results in the following ADA figures:

	2020-21	2021-22	2022-23	2023-24	2024-25
TK-3	22.08	23.04	25.92	25.92	25.92
4-6	18.24	20.16	22.08	22.08	22.08
7-8	9.60	11.52	14.40	14.40	14.40
	<b>49.92</b>	<b>54.72</b>	<b>62.40</b>	<b>62.40</b>	<b>62.40</b>

**1.3 Rates**

Pinecrest Expedition Academy intends to enroll a student population that is reflective of the District it resides in. This budget reflects an unduplicated pupil percentage of 61.80% in 2020-21. This is a conservative estimate based on the unduplicated pupil percentage of the authorized district, other charter schools in the area and that of the authorizing district, Twain Harte Long Barn school district. It also assumes a Free or Reduced Price Meals population of 60.54% and English Learner Population of 0.6%, reflective of the student population in the geographic area.

In-lieu of Property Tax rate of \$11,718.19 per ADA has been used, which is based on certified 2018-19, P-2 Local Revenue of Twain Harte School District.

**Revenues**

**2.1 Local Control Funding Formula**

The Local Control Funding Formula (LCFF) was enacted in 2013-14 and is currently in its 7<sup>th</sup> year of implementation. The LCFF revenues were projected for SPA using the FCMAT LCFF Calculator version 18.2c and base rate assumption (In-lieu of Property Taxes, Unduplicated Pupil) from Twain Harte Long Barn school district’s 2018-19 certified P-2 figures. The following summarizes the LCFF Floor, Target, Gap funding percentage, and Entitlements for PEA:

	2020-21	2021-22	2022-23	2023-24	2024-25
Net State Aid	0	0	0	0	0
EPA	9,984	10,944	12,480	12,480	12,480
In-Lieu of Property Tax	584,972	641,219	731,215	731,215	731,215
<b>TOTAL</b>	<b>594,956</b>	<b>652,163</b>	<b>743,695</b>	<b>743,695</b>	<b>743,695</b>

**2.2 Other Revenues**

Mandate Block Grant has been estimated at \$17.86 per ADA, which is the certified funding rate for K-8 charter schools in 20-21 year and will be \$18.42 per ADA after all.

State Lottery Revenue has been projected at \$151 per ADA for Base, and \$53 per ADA for Proposition 20.

**2.3 Start-up Revenues**

PEA also anticipates receiving a CDE revolving loan of \$250,000 for secured cash flow for first a few years.

PEA anticipates receiving additional start-up funding from local fundraisers. To be conservative, these funds have not been included in the budget. If the school receives these additional start-up funds, it will further improve its income statement and cash flow.

**Expenditures**

3.1 Salaries and Benefits

SALARY POSITIONS ASSUMPTION	2020-21	2021-22	2022-23	2023-24	2024-25
<b>Positions (FTE)</b>					
Certificated Teacher	2.10	2.10	2.10	2.10	2.10
Lead Teacher/Principal	1.00	1.00	1.00	1.00	1.00
Instructional Aide	0.33	0.33	0.33	0.33	0.33
Office Manager	1.00	1.00	1.00	1.00	1.00
Food Service	0.33	0.33	0.33	0.33	0.33
Secretary	0.33	0.33	0.33	0.33	0.33
	5.10	5.10	5.10	5.10	5.10

Calculations for Certificated Teachers are based on an enrollment projection outlined in figure 1.1 enrollment projections. An average teacher cost (salaries & benefits) is estimated to be \$72,104 in year 1 and will increase based on a salary schedule. This competitive salary structure will ensure that PEA recruits qualified talent. The school will also have a designated Principal to provide instructional and operational leadership. Total certificated salaries is expected to be \$186,160 in year 1 and increase in the out-years in alignment with increased enrollment and advancement in the salary schedule.

Non-certificated salaries include positions for a full time Office manager, and a part-time secretary, food service and Instructional Aide. These positions will ensure school operations, safety and compliance with various reporting requirements with different agencies. Total non-certificated salaries is expected to be \$66,600 in year 1 and increase in the out-years with increased enrollment and a 5% annual raise.

The school will offer CalSTRS for eligible employees with the employer contribution rates calculated based on the latest available information. PEA will provide medical benefits per eligible employees at a rate of \$6,000 per year. Worker’s compensation and payroll tax fees are also calculated in the budget.

3.2 Books and Supplies

PEA plans to spend a total of \$49,171 in its first year based upon current expectations, increasing by inflation in out years. The school will spend approximately \$300 per student on approved textbooks and \$100 per student on books & other reference materials. PEA expects to have a 1:1 student to computer ratio for all grade levels. Student Chrome book have been budgeted at \$150 per device. PEA also budgeted for teacher laptops, laptop carts, projectors, and other technology to support the academic program and prepare for State assessment.

### 3.3 Services and Operating Expenses

Services and Operating expenditures have been calculated based on benchmark expenditures of similarly sized charter schools that are currently operating in California. Travel and conferences is budgeted about \$5,950 in year 1 with growth in out-years for school leaders and educators to attend conferences and workshops such as the California Charter Schools Association (CCSA) and Charter School Development Center (CSDC). The school also budgeted for field trip expenses, janitorial services, business/back-office services, legal services, independent auditor fees, banking and accounting fees, and other operating costs using average charter school expenditures of similarly sized schools.

The school budgeted \$2,000 in professional development in year 1 with increase in out-years to implement, support, and enhance its academic program. The funds will be used to continuously improve the quality of instruction and promote instructional leadership.

PEA expects to rent a facility which will be more than adequate in operating a school that is reflective of the enrollment projections. Based upon current contract with Pinecrest Permittees Association, the rent is expected to be \$1,500 per month in the first year.

PEA enters into the agreement with ICON School Management, back office provider, who will provide financial, compliance, and operating support for the school. The contract will be \$4,000 a month in year 1.

The school expects to use the County Special Education service. The school won't receive any special education funds, but will pay extra encroachment to the County for services. The encroachment will be paid \$900 per ADA every year.

### 3.4 Capital Outlay

PEA has budgeted \$2,500 in the first year. PEA is already equipped all computer and furniture for the first year and the school won't expect significant expenses in the first year of operation. However, PEA budgets \$7,000 in 21-22 school year, and \$15,000 per year after all for any possible replace or (and) additional purchase.

### 3.5 Other Outgo

District oversight fees are budget at 1% of Local Control for all years. The school also budgeted for interest payment on Charter School Revolving Loan which the school will receive in order to help with cash flow during the first year of implementation.

### 3.6 Reserve Requirement

In each fiscal year, PEA plans to exceed a budget reserve equal to 5% of total annual operating expenditures or \$50,000, whichever is greater.

## **Cash Flow**

This financial statement shows positive cash flow months during the entire 5 year of operations. Included in the cash flow is a \$250,000 CDE Revolving Loan to help the school with initial start-up costs and buffer cash deficit until funding catches up with the school's operational expenditures. In addition,

PEA is in process to obtain a PCSGP start-up grant of \$425,000 in year 2. However, to be conservative, these funds have not been included in the budget. If the school receives these additional start-up funds, it will further improve its income statement and cash flow.

The school will engage in conservative budget management and implement a fiscal control policy that is approved by the governing board. Strong fiscal management by school leaders and business consultants will result in fiscal solvency and positive financial position.

**Signature Page for Parents**

**We the undersigned** believe that the attached Charter for the creation of the Pinecrest Expedition Academy ("Charter School") merits consideration and hereby petition the governing board of the Twain Harte Long Barn School District to grant approval of the Charter pursuant to Education Code Section 47605 to enable the creation of the Charter School. The Petitioners for the Charter School agree to operate the Charter School pursuant to the terms of the Charter Schools Act and the provisions of the Charter School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the Charter School.

**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
STEVEN CURTO	[Signature]	9.5.19	[Redacted]			
JUSTIN DECKARD	[Signature]	9-7-19				
Holly Dahl	[Signature]	9-7-19				
BRET RIMMER	[Signature]	9-19-19				
SHANNON DUSTON RIMMER	[Signature]	9-19-19				
Heidi Lupo	[Signature]	9.19.19				

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**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

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**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grades TK-8 in 2020-21	Number of children entering grades TK-8 after 2020-21
Ellen Brewer	[Signature]	4/28/19	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Eric Brewer	[Signature]	4/28/19	[Redacted]	[Redacted]	[Redacted]	[Redacted]

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**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4.30.2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Mindy Lancaster	[Signature]	6.6.19	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Heidi Lupo	[Signature]	6.6.19				
David R. Tinsley	[Signature]	6-21				
Kemille Eads	[Signature]	6/23				
Nathan Westmer	[Signature]	8/8/19				
Melissa Patania	[Signature]	8/25/19				
Maureen Bever	[Signature]	8/25/19				

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**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4.22.19  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Jesse Jones	[Signature]	9/25/19	[Redacted]			
Haley Russo	Haley Russo	9/25/19				
Amy Stringer	Amy Stringer	9/25/19				
Jason Stringer	Jason Stringer	9/25/19				

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By the Lead Petitioner:

Heidi Lupo \_\_\_\_\_  
 Name Signature Date 4/15/2019

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Anthony Beafred		6/5/19				
Nathan Rohr		6/5/19				
Kara Terry	Kara Terry	6/5/19				
Katie Garcia	Katie Garcia	6/5/19				
Jonathan Garcia		6-5-19				
Lauren Beard	Lauren Beard	6/5/19				
Jillian Rohr	Jillian Rohr	6/5/19				

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**By the Lead Petitioner:**

Heidi Lupo  
 Name

[Signature]  
 Signature

4/22/2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

**By the Petitioners:**

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Lisa D. Sedlmeyer	[Signature]	8/25/19	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Whitney Schlenker	[Signature]	8/25/19				
Cody Schlenker	[Signature]	8/25/19				
Dan Sedlmeyer	[Signature]	8/25/19				
Brian Bosquel	[Signature]	8-27-19				
Samanth Bosquel	[Signature]	8-27-10				
Nicole Lemus	[Signature]	9-1-19				



Signature Page for Parents

We the undersigned believe that the attached Charter for the creation of the Pinecrest Expedition Academy ("Charter School") merits consideration and hereby petition the governing board of the Twain Harte Long Barn School District to grant approval of the Charter pursuant to Education Code Section 47605 to enable the creation of the Charter School. The Petitioners for the Charter School agree to operate the Charter School pursuant to the terms of the Charter Schools Act and the provisions of the Charter School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the Charter School.

By the Lead Petitioner:

Name Heidi Lupo

Signature [Handwritten Signature]

Date 4/22/19

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8
NICOLE SMITH	<u>[Handwritten Signature]</u>	9/26/19	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
CAROL C. SMITH	<u>[Handwritten Signature]</u>	9/26/19				

**Signature Page for Parents**

We the undersigned believe that the attached Charter for the creation of the Pinecrest Expedition Academy ("Charter School") merits consideration and hereby petition the governing board of the Twain Harte Long Barn School District to grant approval of the Charter pursuant to Education Code Section 47605 to enable the creation of the Charter School. The Petitioners for the Charter School agree to operate the Charter School pursuant to the terms of the Charter Schools Act and the provisions of the Charter School's charter. The petitioners listed below certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the Charter School.

By the Lead Petitioner:

Heidi Lupo  
 Name

[Signature]  
 Signature

4/15/2019  
 Date

The petitioners recognize Heidi Lupo as the Lead Petitioner and hereby authorize the Lead Petitioner to negotiate any amendments to the attached charter necessary to secure approval by the Twain Harte Long Barn School District governing board.

By the Petitioners:

Print Name	Signature	Date	Address	Phone Number	Number of children entering grade TK-8 in 2020-21	Number of children entering grade TK-8 after 2020-21
Courtney Sutton	<u>[Signature]</u>	6/10/19	[Redacted]			
Chris Sutton	<u>[Signature]</u>	12.10.19				
CHARLES HARTS	<u>[Signature]</u>	4/10/19				

## Pinecrest Expedition Academy

VIA: HAND DELIVERY

November 26, 2019

Ms. Cathy A. Parker, Superintendent  
Tuolumne County Board of Education  
Address: 175 Fairview Lane  
Sonora CA 95370

**Re: Description of Changes to the Pinecrest Expedition Academy Charter Petition Necessary to Reflect the Tuolumne County Board of Education as the Authorizing Entity**

Dear Supt. Parker:

The Pinecrest Expedition Academy (the "Charter School") charter petition was submitted to the Twain Harte School District on September 30, 2019. The District Board voted to deny the petition on November 20, 2019.

The Charter School respectfully submits its charter petition on appeal to the Tuolumne County Board of Education (TCBOE) in accordance with Education Code Section 47605(j)(1), and Title 5, California Code of Regulations ("5 CCR") Sections 11967(a) and 11967(d).

In accordance with the requirements of 5 CCR Section 11967(b)(4), we have listed below the relevant and appropriate changes to the charter petition which are necessary to reflect approval by the TCBOE:

**1. Chartering Authority**

*Any text referring to Twain Harte School District, THSD, or the District as the chartering authority or oversight agency would be revised to read "Tuolumne County Board of Education," "Tuolumne County Office of Education," "TCBOE," or the "TCOE."*

**2. Dispute Resolution**

*The Dispute Resolution language in the charter petition will be followed by the paragraph below:*

*"The Charter School recognizes that, because the TCBOE is not a local educational agency, the TCBOE may choose to resolve a dispute directly instead of pursuing the dispute resolution process specified in the charter, it must first hold a public hearing to consider arguments for and against the direct resolution of the dispute instead of pursuing the dispute resolution process specified in the charter."*

**3. Technical Amendments**

*The Charter School will comply with any and all technical amendments to its charter as required by the TCBOE and TCOE.*

In a timely manner, we will make every effort to submit any supplemental documentation that the TCBOE or TCOE may request.

We look forward to working with the TCBOE and the TCOE during consideration of the charter petition. Please feel free to contact me ([pinecrestexpeditionacademy@gmail.com](mailto:pinecrestexpeditionacademy@gmail.com) or 209-985-3044) if you have any questions.

Sincerely,



Heidi Lupo  
Lead Petitioner

## Pinecrest Expedition Academy

### **CERTIFICATION OF COMPLIANCE WITH APPLICABLE LAW**

#### ***California Code of Regulations, Title 5, Section 11967(b)(3)***

A charter petition that has been previously denied by the governing board of a school district may be submitted to the county board of education or the State Board of Education. See Education Code Section 47605(j)(1). As per Education Code Section 47605(j)(5), the State Board of Education has adopted regulations implementing the provisions of Section 47605(j)(1). See Title 5, California Code of Regulations Section 11967 (5 CCR Section 11967).

5 CCR Section 11967 requires that a charter school petition that has been previously denied by a county board of education must be received by the State Board of Education not later than 180 calendar days after the denial. 5 CCR Section 11967(a). In addition, subdivision (b)(3) of Section 11967 requires the charter petitioner to provide a "signed certification stating that petitioner(s) will comply with all applicable law" when submitting the denied petition to the County Board of Education or State Board of Education.

The following certification is submitted in compliance with 5 CCR Section 11967(b)(3).

#### **Certification**

By signing below, I certify as follows:

1. That I am the authorized representative and that I am competent and qualified to certify to the facts herein;
2. That, as authorized representative, I have personal knowledge of the facts forming the basis of this certification;
3. That I make this certification for purposes of 5 CCR Section 11967(b)(3) only; and
4. That the charter petitioner(s) and the charter petition are in compliance with applicable law.

Name: Heidi Lupo, Lead Petitioner

Signature: \_\_\_\_\_



Date: November 20, 2019

School Name: Pinecrest Expedition Academy

**RESOLUTION NO. 2019-2020-11-02**

**RESOLUTION OF THE BOARD OF EDUCATION OF THE  
TWIN HARTE SCHOOL DISTRICT DENYING THE PINECREST EXPEDITION  
ACADEMY CHARTER PETITION AND ADOPTING WRITTEN  
FINDINGS OF FACT**

**WHEREAS**, pursuant to California Education Code section 47605(a)(1), on September 30, 2019, lead petitioner Heidi Lupo submitted a timely petition to establish the Pinecrest Expedition Academy Charter School to the Twain Harte School District; and

**WHEREAS**, the Twain Harte School District conducted a public hearing on the provisions of the proposed charter on October 23, 2019, during a meeting of the Twain Harte School District Board of Education at the District Office, and assessed the level of support for the petition from parents, the District, and the community; and

**WHEREAS**, Twain Harte School District administrators have reviewed and analyzed the petition and supporting documents and have identified deficiencies in and concerns related to the petition, and have recommended that the Twain Harte School District Board of Education deny the petition for the reasons expressed in Exhibit A hereto, Findings of Fact; and

**WHEREAS**, pursuant to California Education Code section 47605(b)(1), (2), and (5), and section 47605(g), the Twain Harte School District Board of Education finds that granting the petition to establish the Pinecrest Expedition Academy Charter School is not consistent with sound educational practice.

**NOW, THEREFORE**, it is hereby **RESOLVED** as follows:

**Section 1.** That the above recitals are all true and correct.

**Section 2.** That the proposed Findings of Fact attached hereto as Exhibit A are adopted as the final Findings of Fact regarding the factual findings specific to the petition, and support that:

1. The proposed charter school presents an unsound educational program for the pupils to be enrolled in the charter school; and
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
3. The petition does not contain reasonably comprehensive descriptions of some required elements of a charter.
4. The petition does not contain all the information regarding the proposed operation and potential effects of the charter school required by law.

**Section 3.** That the petition to establish the Pinecrest Expedition Academy Charter School is denied.

**ADOPTED, SIGNED, AND APPROVED** this 20th day of November, 2019.

BOARD OF EDUCATION OF THE  
TWIN HARTE SCHOOL DISTRICT

By: \_\_\_\_\_  
President

By: \_\_\_\_\_  
Clerk

CLERK'S CERTIFICATE

I, Chantal Fowler, Clerk of the Board of Education of the Twain Harte School District, hereby certify that the foregoing is a full, true, and correct copy of a resolution adopted at a regular meeting place thereof on the 20 day of November, 2019, of which meeting all of the members of said Board of Education had due notice and at which a majority thereof were present; and that at said meeting said resolution was adopted by the following vote:

AYES: 5  
NOES: 0  
ABSENT: 0

An agenda of said meeting was posted at least 72 hours before said meeting at Twain Harte, California, at a location freely accessible to members of the public, and a brief general description of said resolution appeared on said agenda.

I further certify that I have carefully compared the same with the original minutes of said meeting on file and of record in my office; that the foregoing resolution is a full, true, and correct copy of the original resolution adopted at said board meeting and entered in said minutes; and that said resolution has not been amended, modified, or rescinded since the date of its adoption, and the same is now in full force and effect.

Dated: November 20, 2019

  
Clerk of the Board of Education  
of the Twain Harte School District

Twain Harte School District  
Proposed Findings of Fact – November 20, 2019  
2019 Pinecrest Expedition Academy Charter School Petition

**I. Introduction**

For the second time in nearly two years, Pinecrest Expedition Academy (“PEA”), a nonprofit charter school operator, has submitted what is essentially the same charter school petition (“2018 Petition” and “2019 Petition,” respectively) to the Twain Harte School District (“District”) for a TK-8 charter school (“Charter School”) to be located at the former site of the District’s Pinecrest School. The 2018 Petition was denied by the District Board of Education/Trustees (“Board”) and the Tuolumne County Board of Education (“TCBOE”). (See 2019 Petition Exhibit Package (“2019 Exhibit Package”), p. 259.) The State Board of Education (“SBE”) refused to agendaize or hear the appeal of the 2018 Petition because of deficiencies therein. (2019 Exhibit Package, p. 259.) The 2019 Petition, which was submitted to the District on September 30, 2019, purports to fix the insurmountable issues that led to the 2018 Petition’s repeated denials (see 2019 Exhibit Package, p. 327), but the 2019 Petition falls short of its intended purpose. Moreover, the 2019 Petition further muddies the waters by providing disjointed and repetitive discussions (see, e.g., 2019 Exhibit Package, pp. 23-37, 57-59, 64-66, careless references to what appears to be the Orange County Department of Education (i.e., “OCDE”) instead of the Tuolumne County Superintendent of Schools Office (“TCSOSO”) (see, e.g., 2019 Exhibit Package, p. 24) and “FUSD” instead of Twain Harte School District (see 2019 Exhibit Package, p. 67), and information that is unreadable (see, e.g., 2019 Exhibit Package, p. 135). Therefore, because the 2019 Petition fails to remedy the multiple deficiencies in the 2018 Petition, and based upon a thorough and careful review of the 2019 Petition as well as public input received at the public hearing held on October 23, 2019, the District recommends that the Board deny the 2019 Petition.

The District continues to recognize and empathize with the situation the Pinecrest area faces due to the lack of a school in that area. Indeed, the District operated the Pinecrest School for over thirty years in order to serve the Pinecrest area, closing at the end of the 2011-2012 school year only because its operation was no longer financially feasible. However, the District has remained steadfast in its commitment to the Pinecrest area since the closure of the Pinecrest School by offering transportation services to Pinecrest area students wishing to take advantage of the excellent academic curriculum available at the Twain Harte School. While Heidi Lupo, the 2019 Petition’s lead petitioner, has argued, as she did with respect to the 2018 Petition, that the 2019 Petition proposes an educationally sound and financially viable alternative to Twain Harte School (2018 Petition Exhibit Package (“2018 Exhibit Package”), pp. 192, 193; see 2019 Exhibit Package, p. 323), the District must respectfully disagree.

The District has concluded that the 2019 Petition should be denied for the reasons summarized below, in keeping with the dictates of Education Code section 47605(b):

1. The Charter School presents an unsound educational program for the pupils to be enrolled therein. As discussed further in Section V.A. of these Findings of Fact, the Petition does not address how academic development appropriate for each grade level will be accomplished in the context of the Charter School's multi-grade classrooms, does not provide for sufficient days of instruction, and is unsatisfactory in its discussion of the Charter School's special education and independent study programs.
2. Petitioners are demonstrably unlikely to successfully implement the program set forth in the 2019 Petition. As discussed further in Section V.B. of these Findings of Fact, the Charter School's enrollment projections are problematic and its viability is premised on inaccurate revenue projections. In addition, Petitioners have not demonstrated successful experience in operating and managing a charter school and have not developed a comprehensive plan for attracting and retaining the highly trained and experienced personnel called for in the 2019 Petition.
3. The 2019 Petition does not contain reasonably comprehensive descriptions of all 15 elements specified in Education Code section 47605(b)(5). As discussed further in Section V.C. of these Findings of Fact, the 2019 Petition does not contain a reasonably comprehensive description of the Charter School's educational program, the qualifications of Charter School employees, the procedures the Charter School will follow to ensure the health and safety of pupils and staff, the means by which the Charter School will achieve a racial and ethnic balance among its pupils that is reflective of the surrounding general population, and the manner in which staff members of the Charter School will be covered by the State Teachers' Retirement System ("STRS"), the Public Employees' Retirement System ("PERS"), or federal social security.
4. The 2019 Petition does not contain all the information regarding the proposed operation and potential effects of the Charter School required by Education Code section 47605(g). As discussed further in Section V.D. of these Findings of Fact, the 2019 Petition fails to provide adequate or accurate information related to the facilities to be used by the Charter School and complete or convincing information regarding the manner in which the Charter School's administrative services will be provided.

These Findings of Fact elaborate upon the conclusions above and present a final analysis of the 2019 Petition for consideration by the Board. It should be noted, however, that these Findings of Fact only address the most significant areas of concern with respect to the 2019 Petition. They do not exhaustively list every concern regarding, or error, omission, or deficiency in, the 2019 Petition.

Should the Board take action to deny the 2019 Petition, it shall adopt these Findings of Fact in support of its denial.

## **II. Procedural Overview**

### **A. General Overview and 2019 Petition**

Pursuant to Education Code section 47605(b), the governing board of a school district in receipt of a charter petition must hold a public hearing on the provisions of the charter within 30 days of receipt of the petition, at which time the board shall consider the level of support for the petition by teachers employed by the district, other employees of the district, and parents. The Board met this requirement when it held a public hearing on October 23, 2019, 23 days after the District's receipt of the 2019 Petition on September 30, 2019.

Education Code section 47605(b) further requires that the governing board of a school district in receipt of a charter petition either grant or deny the petition within 60 days of its receipt by the school district. The Board will meet this requirement by acting on the 2019 Petition on November 20, 2019, 51 days after the District's receipt of the 2019 Petition on September 30, 2019.

If the Board grants the 2019 Petition, the Charter School becomes a legal entity with the District as its chartering authority. If the Board denies the 2019 Petition, Petitioners may appeal the denial to the TCBOE per Education Code section 47605(j)(1). If the TCBOE grants the 2019 Petition, the Charter School becomes a legal entity, and the TCBOE becomes the supervisory agency over the Charter School. If the TCBOE denies the 2019 Petition, Petitioners may appeal the denial to the SBE per Education Code section 47605(j)(1). If the SBE grants the 2019 Petition, the Charter School becomes a legal entity, and the SBE becomes the supervisory agency over the Charter School (see Education Code section 47605(k)(1)). However, pursuant to Education Code section 47605(k)(1), the SBE may, by mutual agreement, designate its supervisory and oversight responsibilities to any local educational agency in Tuolumne County or to the Board. If either the TCBOE or the SBE, as the case may be, fails to act on the 2019 Petition within 120 days of its receipt, the decision of the Board to deny the 2019 Petition shall be subject to judicial review per Education Code section 47605(j)(4).

### **B. 2018 Petition**

On February 27, 2018, PEA submitted the 2018 Petition to the District. (See 2019 Exhibit Package, pp. 202, 221.) On April 25, 2018, the Board denied the 2018 Petition by a vote of five to zero. (See 2019 Exhibit Package, p. 231.)

On May 11, 2018, the Board's denial of the 2018 Petition was appealed to the TCBOE. (See 2019 Exhibit Package, pp. 237, 238.) On August 13, 2018, the TCBOE conditionally approved the 2018 Petition by a vote of four to three. (See 2019 Exhibit Package, p. 250.) On October 8, 2018, the TCBOE unanimously rescinded the 2018 Petition's conditional approval. (See 2019 Exhibit Package, p. 254.)

On December 3, 2018, the TCBOE's denial of the 2018 Petition was appealed to the SBE. (See 2019 Exhibit Package, p. 259.) On January 14, 2019, the SBE refused to agendize or hear the appeal of the 2018 Petition because of deficiencies therein. (2019 Exhibit Package, p. 259.)

### **III. Standard of Review**

Education Code section 47605(b) sets forth the following standards for consideration of charter petitions:

First, the chartering authority shall be guided by the intent of the Legislature that charter schools are and should become an integral part of the California educational system and that establishment of charter schools should be encouraged.

Second, a school district governing board shall grant a charter for the operation of a charter school if it is satisfied that granting the charter is consistent with sound educational practice.

Third, a school district governing board shall not deny a charter petition unless one or more of the following findings are made:

1. The charter school presents an unsound educational program for the pupils to be enrolled in the charter school. (Education Code section 47605(b)(1).)
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition. (Education Code section 47605(b)(2).)
3. The petition does not contain the number of signatures required by Education Code section 47605(a). (Education Code section 47605(b)(3).)
4. The petition does not contain an affirmation of each of the conditions described in Education Code section 47605(d). (Education Code section 47605(b)(4).)
5. The petition does not contain reasonably comprehensive descriptions of all 15 elements required by Education Code section 47605(b)(5).
6. The petition does not contain a declaration of whether or not 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. (Education Code section 47605(b)(6).)

The review of a charter petition is also guided by the regulations promulgated by the SBE, which expand upon the elements above. (See California Code of Regulations, title 5, sections 11967.5 et seq.)

As summarized in the Introduction to these Findings of Fact, the District has concluded that the 2019 Petition is deficient with respect to items 1, 2, and 5 above.

### **IV. Staff Team Review**

A team of District staff members (“Staff Team”) thoroughly and carefully reviewed the 2019 Petition. Each member of the Staff Team reviewed either the entire 2019 Petition or sections thereof, as relevant to his/her area of expertise.

The following individuals comprised the Staff Team:

- Rick Hennes, Superintendent
- Tonya Royce, Chief Business Official
- Ron Wurz, Maintenance, Operations, and Transportation Director
- Gabe Wingo, Principal
- Laura DeMars, 4th Grade Teacher
- Wendie Roberts, California School Employees Association President and Librarian
- Parker & Covert LLP, Legal Counsel

As stated in the Introduction to these Findings of Fact, the District, through its Staff Team, recommends that the Board deny the 2019 Petition.

## V. Discussion

### A. The Charter School presents an unsound educational program for the pupils to be enrolled therein.

#### 1. The 2019 Petition does not address how academic development appropriate for each grade level will be accomplished in the context of the Charter School's multi-grade classrooms.

The Charter School will serve students in grades TK-8. (See, e.g., 2019 Exhibit Package, pp. 11, 12, 20.) Students will be instructed in two multi-grade classrooms. (2019 Exhibit Package, p. 12.)

While the Charter School will use what the 2019 Petition describes as an “expeditions and outdoor learning” curriculum (2019 Exhibit Package, p. 7), the 2019 Petition is also very clear that the Charter School will be dedicated to rigorous academic learning (see 2019 Exhibit Package, pp. 17, 18, 74). However, the 2019 Petition is completely silent as to how grade appropriate academic development will take place in classrooms with such varying grade levels, especially given the proposed student-to-teacher ratio (see 2019 Exhibit Package, p. 13), the fact that one of the teachers will provide services for special education and independent study students (2019 Exhibit Package, pp. 12, 64), the fact that the Lead Teacher is tasked with many other responsibilities in addition to teaching (2019 Exhibit Package, pp. 57-58), and the fact that the educational program offered is designed to be personalized and customized (2019 Exhibit Package, pp. 18, 19, 40). Further, the 2019 Petition does not provide how the Charter School will avoid teacher burnout in such a challenging environment, a factor that contributed to the closing of a similar school in the Pinecrest area only a few years ago. (See Section V.B.1.d. of these Findings of Fact.) A thorough discussion of these issues is required in order for Petitioners to present a sound educational program for Charter School pupils.

#### 2. The 2019 Petition does not provide for sufficient days of instruction.

Compounding the serious issues created by the Charter School's two multi-grade classrooms, and contributing to an unsound educational program, is the fact that the 2019 Petition does not provide for sufficient days of instructions. The 2019 Petition provides for 176 days of instruction (2019 Exhibit Package, p. 22) with two snow days (2019 Exhibit Package, p. 106), which is not consistent with the

number of days offered by other school districts, including ours. For instance, the District offers 180 days of instruction with one snow day. The limited number of days of instruction and snow days proposed by the 2019 Petition raises concerns regarding whether the Charter School can provide a sound educational program for the pupils to be enrolled therein, as well as whether the Charter School can successfully implement the program set forth in the 2019 Petition, especially taking into account the inclement weather known to the area.

**3. The 2019 Petition is unsatisfactory in its discussion of special education.**

The Charter School presents an unsound educational program for special education students to be enrolled therein. The 2019 Petition does expand upon the discussion of special education as compared to the 2018 Petition (see 2018 Exhibit Package, pp. 19-24; 2019 Exhibit Package, pp. 23-37), but it still fails to provide a discussion that cures the special education shortfalls in the 2018 Petition that were raised not only by the Board (see 2019 Exhibit Package, pp. 205-206), but also by the TCBOE (see 2019 Exhibit package, pp. 244-245). For instance, the 2019 Petition provides that the Charter School will adhere to all applicable provisions of law relating to students with disabilities (2019 Exhibit Package, pp. 4, 23, 29), that the Charter School will be solely responsible for compliance with Section 504 of the Rehabilitation Act of 1973 and the American with Disabilities Act (2019 Exhibit Package, p. 32), and that the Charter School will provide and remain responsible for special education as required by the Education Code and the Individuals with Disabilities Education Act (see, e.g., 2019 Exhibit Package, pp. 23). While the 2019 Petition outlines the Charter School's special education responsibilities, it does not explain in sufficient or convincing detail how it plans to carry out these responsibilities.

For instance, the 2019 Petition discusses that the Charter School will hire, train, and employ site staff (e.g., special education teachers, paraprofessionals, and resource specialists) and itinerant staff (e.g., speech therapists, occupational therapists, behavioral therapists, and psychologists) necessary to provide special education services (2019 Exhibit Package, p. 35), identify special education students (see, e.g., 2019 Exhibit Package, p. 25), conduct individualized education program ("IEP") meetings (see, e.g., 2019 Exhibit Package, p. 35), and be solely responsible for selecting, contracting with, and overseeing all non-public schools and non-public agencies used to serve special education students (2019 Exhibit Package, p. 36), but the allocation of monies does not appear to be sufficient to support these assurances.

It is especially concerning that the budget does not allocate for the hiring of a dedicated special education teacher. (See 2019 Exhibit Package, p. 12.) The 2019 Petition provides for three certificated staff members during the Charter School's first five years of operation. (2019 Exhibit Package, p. 13.) This is problematic in and of itself because these three teachers will have to teach up to 65 students in multi-grade classrooms (see 2019 Exhibit Package, p. 13), but is even more problematic because these teachers will also have to serve students of varying degrees of disability and special needs, including attending IEP meetings (2019 Exhibit Package, p. 30), all without specified support available to them in order to fulfill these daunting tasks.

It is also concerning that the 2019 Petition shows an allocation of only \$44,928 in special education encroachment for the 2020-2021 school year (increasing to \$56,160 for the 2024-2025 school year) and zero dollars for special education services for the Charter School's first five years of operation

(2019 Exhibit Package, p. 138), which does not appear to be nearly enough funding to serve special education students in the manner proposed in the 2019 Petition.

Additionally, and of much significance, the 2019 Petition fails to describe how the Charter School will handle complaints related to special education services, including due process complaints, which can be a very expensive endeavor, especially when the hiring of special education attorneys or the provision of compensatory services become necessary. (See 2019 Exhibit Package, pp. 31-32, 37.) The 2019 Petition merely acknowledges the Charter School's responsibility to resolve such disputes (see 2019 Exhibit Package, p. 32) and provides that the Charter School will eventually adopt policies for responding to parental concerns or complaints related to special education services (see 2019 Exhibit Package, p. 37).

Finally, the 2019 Petition provides that the Charter School will apply directly for membership in a Special Education Local Plan Area ("SELPA"). (See 2019 Exhibit Package, p. 24.) Membership in a SELPA requires a detailed memorandum of understanding ("MOU") that clearly delineates the duties and obligations of the Charter School and the SELPA in providing required special education services. However, such an MOU with the Tuolumne County SELPA is likely problematic. The Tuolumne County SELPA reviewed the 2018 Petition's approach to special education and advised that the 2018 Petition failed to meet 11 out of the 16 required elements studied: "Results indicate an inadequate description of a comprehensive plan to meet the needs of students with mild/moderate or moderate/severe disabilities under Section 504 of the Rehabilitation Act or the Individuals with Disabilities Education Act." (2018 Exhibit Packet, pp. 186-187.) Petitioners failed to successfully rebut the Tuolumne County SELPA's conclusions in 2018. As noted above, the special education discussion in the 2019 Petition (see 2019 Exhibit Package, pp. 23-37) does not cure the defects of the special education discussion in the 2018 Petition (see 2018 Exhibit Package, pp. 19-24), so that an MOU between the Charter School and the Tuolumne County SELPA seems as unlikely in 2019 as it was in 2018.

**4. The 2019 Petition is unsatisfactory in its discussion of the Charter School's independent study program.**

The 2019 Petition includes an independent study option that was not part of the 2018 Petition. (See 2019 Exhibit Package, pp. 8, 20-22, 324, 327.) Ms. Lupo argues that the independent study option provides the Charter School with the ability to financially sustain its program without grant funds. (2019 Exhibit Package, p. 327.) Not only is this statement suspect, but the 2019 Petition presents an unsound educational program for independent study students and one that will most likely not be successfully implemented.

Historical data does not support the proposition that the Charter School will be successful in enrolling a significant number of independent study students. For instance, the District does not currently have an independent study program. Further, Mountain Oaks was ostensibly an independent study school, and it failed, partly because the parents of students enrolled therein insisted on receiving regular school services. Indeed, Petitioners provide no evidence whatsoever that the Charter School will implement its proposed independent study program successfully, and the 2019 Petition is even devoid of a proposed board policy or a typical work/master agreement in support of the Charter School's independent study program. (See 2019 Exhibit Package, pp. 20-22.)

The Charter School's independent study program suffers from other insurmountable deficiencies, even assuming that enough students will show interest in enrolling therein. First, in light of the inflated enrollment numbers discussed in Section V.B.1 of these Findings of Fact and the resulting overstated revenues, the 2019 Petition contains no evidence that funding will be available in the foreseeable future for a teacher to support an independent study program. (See 2019 Exhibit Package, pp. 63, 64, and 65.) Indeed, the 2019 Petition provides that one of the three teachers at the Charter School will be responsible for both the independent study and special education programs in addition to his or her other teaching duties. (See 2019 Exhibit Package, p. 12.) This teacher will also be expected to meet with independent study students once per week (2019 Exhibit Package, p. 20), or at least once every 20 school days (2019 Exhibit Package, p. 21), depending on which part of the 2019 Petition's two-page discussion of the independent study program one is reading, as one description is not consistent with the other. Second, the 2019 Petition contains no evidence that any internet service or computers will be available in order for independent study students to access the required online learning programs, webcasts, and live streams. (See 2019 Exhibit Package, p. 21.) Third, the 2019 Petition itself acknowledges that the independent study program is in conflict with the Charter School's regular program (see 2019 Exhibit Package, p. 21), thus increasing the likelihood of burnout for the teacher who will have to cover both programs in addition to special education and the likelihood that the independent study program will be unsuccessful.

**B. Petitioners are demonstrably unlikely to successfully implement the program set forth in the 2019 Petition.**

Because the 2019 Petition presents an unsound educational program, it is demonstrably unlikely that Petitioners will successfully implement said program. Moreover, there are other insurmountable challenges faced by PEA that require the District to deny the 2019 Petition, not least of which is the fact that the Petition fails to explain how the Charter School makes economic sense.

California Code of Regulations, title 5, section 11967.5.1(c) states that a factor to be considered in determining whether charter petitioners are demonstrably unlikely to successfully implement the program set forth in a charter petition is whether the petitioners have presented an unrealistic financial and operational plan for the proposed charter school. Section 11967.5.1(c)(3) provides as follows:

An unrealistic financial and operational plan is one to which any or all of the following applies: . . .

(B) In the area of financial administration, the charter or supporting documents do not adequately:

1. Include, at a minimum, the first-year operational budget, start-up costs, and cash flow, and financial projections for the first three years.
2. Include in the operational budget reasonable estimates of all anticipated revenues and expenditures necessary to operate the school, including, but not limited to, special education, based, when possible, on historical data from schools or school districts of similar type, size, and location.

3. Include budget notes that clearly describe assumptions on revenue estimates, including, but not limited to, the basis for average daily attendance estimates and staffing levels.
4. Present a budget that in its totality appears viable and over a period of no less than two years of operations provides for the amassing of a reserve equivalent to that required by law for a school district of similar size to the proposed charter school.
5. Demonstrate an understanding of the timing of the receipt of various revenues and their relative relationship to timing of expenditures that are within reasonable parameters, based, when possible, on historical data from schools or school districts of similar type, size, and location.

The 2019 Petition fails to meet the requirements of Section 11967.5.1(c)(3)(B) – in particular the presentation of a budget that in its totality appears viable – and therefore provides an unrealistic financial and operational plan, as discussed in more detail below.

**1. The Charter School’s enrollment projections are problematic.**

**a. The number of signatures provided in support of the 2019 Petition inflate the Pinecrest community’s interest in Charter School attendance.**

The 2019 Petition is supported by the signature of 39 individuals who “certify that they are parents or guardians who are meaningfully interested in having their children or wards attend the Charter School.” (See 2019 Exhibit Package, pp. 178-186.) The District discovered in the course of reviewing the 2019 Petition that multiple signatures were provided for the same child or children in certain instances, that a number of individuals signed who have no children in the grades to be served by the Charter School, and that some signatories reside outside District boundaries. As a result, the District was able to verify that only 32 students would potentially attend the Charter School during its first year of operation based on an accurate count of the signatures, falling short of the 2019 Petition’s projected 52-student enrollment during the Charter School’s first year of operation (see 2019 Exhibit Package, pp. 10, 12, 133) by approximately 38%.

The District’s review of the 2019 Petition’s signature pages included a comparison of the names of parents/guardians, the number of represented children, documentation available through the District’s enrollment/student information services databases, and information obtained via telephone calls to signatories. The District discovered the following:

- Shannon and Bret Rimmer both signed, but their certifications likely refer to the same children.
- Ms. Lupo signed twice.
- Charles Hard signed, but he has the same address as Ms. Lupo, so their certifications likely pertain to the same child/children.

- Ellen and Eric Brewer both signed, but they have the same address, so their certifications likely pertain to the same children.
- Kamilla E. and David Tingey both signed, but they have the same address, so their certifications likely pertain to the same child.
- Nathan Weltmer signed, but he resides outside District boundaries.
- Melissa Patania signed, but she resides outside District boundaries.
- Haley Russo and Jesse Jones both signed, but they have confirmed via telephone that their certifications pertain to only one child eligible for enrollment in the Charter School.
- Amy and Jason Stringer both signed, but they do not have any children eligible for enrollment in the Charter School.
- Lauren and Anthony Beaird both signed, but they have confirmed via telephone that they only have one child eligible for enrollment in the Charter School for the 2020-2021 school year.
- Jillian and Nathan Rohr both signed, but they have the same address, so their certifications likely pertain to the same child.
- Katie and Jonathan Garcia both signed, but they have the same address, so their certifications likely pertain to the same child.
- Lisa and Dan Sedlmeyer both signed, but they have the same address, so their certifications likely pertain to the same children.
- Whitney and Cody Schlenker both signed, but they have the same address, so their certifications likely pertain to the same children.
- Samantha and Brian Bosque both signed, but they have the same address, so their certifications likely pertain to the same children.
- Mr. and Mrs. Smith both signed, but Mr. Smith's signature indicates that their certifications pertain to the same child.
- Courtney and Chris Sutton both signed, but they reside outside District boundaries.

(See 2019 Exhibit Package, pp. 178-186.) This data confirms that, as stated above, only 32 students would potentially attend the Charter School during its first year of operation based on an accurate analysis of the signatures presented in the 2019 Petition. The number of signatures provided in support of the 2019 Petition therefore inflate the Pinecrest community's interest in Charter School attendance. This becomes even more obvious when considering the fact that, in spite of Ms. Lupo's claim that Petitioners have "very strong support" of the community (2018 Exhibit Package, p. 192; see 2019 Exhibit Package, pp. 7-8), only four individuals who supported the 2018 Petition, in addition to Ms. Lupo and Petitioners' attorney, showed up at the Board's March 19, 2018 public hearing where the fate of the Charter School was hanging in the balance (see 2018 Exhibit Packet, pp. 190-193). Similarly, the Board's October 23, 2019 public hearing was poorly attended by supporters of the 2019 Petition. (See 2019 Exhibit Package, pp. 323-325.) Only eight supporters, in addition to Ms. Lupo, showed up (2019 Exhibit Package, pp. 323-325). Further, in addition to Ms. Lupo, only one individual who signed the 2019 Petition spoke in support thereof on October 23, 2019 – Ms. Sutton – but she resides outside District boundaries, as noted above. (See 2019 Exhibit Package, pp. 178-186, 323-325.)

**b. Petitioners base the Charter School’s enrollment projections on unsubstantiated optimism.**

The following are the 2018 Petition’s enrollment projections:

<u>School Year</u>	<u>2018-2019</u>	<u>2019-2020</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>
<u>Grades K-3</u>	13	17	23	27	45
<u>Grades 4-6</u>	9	15	28	28	33
<u>Grades 7-8</u>	3	8	14	18	22
<u>Total Enrollment</u>	25	40	65	73	100
<u>Percent Change Over Prior Year</u>	---	60%	62.5%	12.31%	37%

(See 2018 Exhibit Package, p. 114.)

The following are the 2019 Petition’s enrollment projections:

<u>School Year</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>
<u>Grades K-3</u>	23	24	27	27	27
<u>Grades 4-6</u>	19	21	23	23	23
<u>Grades 7-8</u>	10	12	15	15	15
<u>Total Enrollment</u>	52	57	65	65	65
<u>Percent Change Over Prior Year</u>	---	9.62%	14.04%	0%	0%

(2019 Exhibit Package, pp. 133-134.) It should be noted that the enrollment projections above for the Charter School’s first, second, and fifth years of operation are likely the result of Petitioners’ incorrect mathematics. (See 2019 Exhibit Package, p. 13.) Indeed, if the more detailed figures provided in the 2019 Petition are added correctly, a total of 47 (instead of 52) students are projected to be enrolled in the Charter School during the 2020-2021 school year, 52 (instead of 57) during the 2021-2022 school year, and 64 (instead of 65) during the 2024-2025 school year. (See 2019 Exhibit Package, p. 13.) These discrepancies, as discussed in Section V.B.2 of these Findings of Fact, have a substantially negative impact on the Charter School’s projected revenues.

The following are the 2018 Petition’s average daily attendance (“ADA”) projections:

<u>School Year</u>	<u>2018-2019</u>	<u>2019-2020</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>
<u>ADA</u>	24.00	38.40	62.40	70.08	96.00

(2018 Exhibit Package, p. 115.)

The following are the 2019 Petition’s average ADA projections, based on Petitioners’ likely incorrect mathematics:

<u>School Year</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>
<u>ADA</u>	49.92	54.72	62.40	62.40	62.40

(2019 Exhibit Package, pp. 130-131.)

Petitioners have substantially reduced the projected enrollment numbers in the 2019 Petition as compared to the 2018 Petition in order to address the concerns with the 2018 Petition’s unsupported exponential growth in projected enrollment. This reduction is tantamount to an admission on behalf of Petitioners that the District was correct in its conviction that the 2018 Petition’s projected enrollment numbers were – for one reason or another – inflated. Furthermore, the 2019 Petition acknowledges that the population in the Pinecrest area is currently unpredictable and that enrollment in the Charter School will not be large. (2019 Exhibit Package, pp. 11, 13.) Therefore, even the reduced projected enrollment and its limited increase over the first few years of the Charter School’s operation presented in the 2019 Petition may be optimistic, as discussed in more detail below. The 2019 Petition goes as far as to reiterate the District’s conclusion, stating that the Charter School will “face some unique hurdles due to [its] low enrollment numbers” (2019 Exhibit Package, p. 7). Perhaps the most important of these hurdles is the fact that the reduction in enrollment will necessarily translate into a reduction in revenues.

**c. The District’s Pinecrest School closure is evidence of declining enrollment not only at the Pinecrest School itself, but also District-wide.**

The District’s Pinecrest School was inviable due, in part, to declining enrollment, both at the school and District levels. In spite of this reality, PEA is basically proposing to reopen the Pinecrest School, even in the same location.

The numbers speak for themselves:

<u>School Year</u>	<u>Twain Harte School ADA/Enrollment</u>	<u>Pinecrest School ADA/Enrollment</u>	<u>Total District ADA/Enrollment</u>
2007-2008	324.57 / 341	53.34 / 57	377.91 / 398
2008-2009	296.83 / 317	53.74 / 55	350.57 / 372
2009-2010	256.95 / 271	47.19 / 51	304.14 / 322
2010-2011	264.17 / 281	47.69 / 49	311.86 / 330
2011-2012	262.32 / 281	34.52 / 35	296.84 / 316

In addition to declining enrollment, and related thereto, the loss of “necessary small school” funding in 2012, and the resulting loss of extra ADA/Local Control Funding Formula (“LCFF”) funding, were also responsible for sounding the Pinecrest School’s death knell. It begs the question then: If the Pinecrest School was “unnecessary” in 2012, what makes the Charter School “necessary” in 2019? Petitioners fail to convincingly answer this vital question.

**d. The brief existence of the Mountain Oaks Charter School Pinecrest Campus supports the District’s conclusion that the Charter School is doomed to fail.**

The fact that the Charter School is unnecessary and, indeed, superfluous, is supported by yet more historical evidence. The Calaveras County Office of Education (“CCOE”) approved the Mountain Oaks Charter School Pinecrest Campus (“Mountain Oaks”) in 2012, shortly after the District closed its Pinecrest School, in order to serve the former Pinecrest School students and at the behest of the Pinecrest area parents. Mountain Oaks was doomed to failure for many of the same reasons

that the Charter School is. Indeed, Mountain Oaks closed its doors in 2014, after only two years of operation. (2018 Exhibit Package, pp. 190-191.) The numbers are, again, revealing:

<u>School Year</u>	<u>District ADA/Enrollment</u>	<u>Mountain Oaks ADA/Enrollment</u>
2012-2013	269.65 / 284	27.97 / 29
2013-2014	275.35 / 291	24.26 / 25

The numbers show that the declining enrollment experienced by the District at the Pinecrest School continued under the auspices of Mountain Oaks. These figures also show that the projected enrollment numbers for the Charter School reflected in the 2019 Petition are much higher than those of Mountain Oaks. (See 2019 Exhibit Package, p. 13.) It is disingenuous to think that the mere six years that will have elapsed from the closing of Mountain Oaks to the opening of the Charter School would translate into a 27-student increase in enrollment. (See 2019 Exhibit Package, p. 13.)

In addition, Petitioners fail to reveal that, while Mountain Oaks was ostensibly an independent study school, the parents of students at Mountain Oaks insisted on receiving regular school services from its two teachers, so that the services to be provided by the Charter School and the services that were in fact provided by Mountain Oaks are comparable. Teacher burnout contributed to Mountain Oaks' closure in 2014, and there is no reason to believe that this will not happen with the Charter School as well.

- e. **The Tuolumne County Superintendent of Schools Office's return of PEA's early2018 countywide charter petition supports the District's finding that the Charter School will not attract students from throughout Tuolumne County but that, rather, the Charter School's very limited student population will be drawn from Pinecrest itself and its immediate environs.**

The 2019 Petition is PEA's third attempt to open a charter school in Pinecrest in nearly two years. Before the submission of the 2018 Petition to the District, PEA submitted a countywide charter petition to the TCSOSO. The TCSOSO returned PEA's countywide charter petition before its consideration by the TCBOE. (See 2018 Exhibit Package, p. 210.) The TCSOSO's return provides additional evidence in support of the District's position.

A countywide charter will only be granted if, in addition to other Education Code requirements, the charter school is found to provide services to a countywide pupil population that will benefit from those services and that cannot be served as well by a charter school that operates in only one school district in the county. (Education Code section 47605.6(a).) The TCSOSO concluded that PEA's proposed charter school would not offer services to a countywide pupil population that would benefit from those services. The TCSOSO further concluded that PEA's proposed charter school would only offer services of benefit to students within the District's jurisdiction.

The fact that the TCSOSO found that PEA's proposed charter school would not offer services to a countywide pupil population supports the conclusion that only District residents should be expected to enroll in the Charter School. Therefore, Petitioners' reliance on attracting non-resident students to enroll in the Charter School is misplaced. (See 2019 Exhibit Package, p. 7.) This conclusion is underscored by the fact that, while the District offers student transportation, the Charter School would not, as further discussed below.

f. **The fact that the Charter School will not offer transportation services further limits the Charter School's enrollment pool.**

As noted above, the Charter School's lack of transportation services (2019 Exhibit Package, p. 99) also supports the conclusion that the Charter School will not be successful because its enrollment projections are overstated. While supporters of the 2019 Petition point to the transportation difficulties associated with Pinecrest area students having to travel to Twain Harte School (see Exhibit Package, p. 12), they fail to acknowledge the flip side of that equation, namely, that travel difficulties will negatively impact enrollment at the Charter School as well. It makes complete sense that transportation is an issue in both directions, to and from Pinecrest, especially in light of Petitioners' reliance on the enrollment of out-of-District students (see 2019 Exhibit Package, p. 7). Indeed, lack of transportation was an issue contributing to Mountain Oak's closure. (2018 Exhibit Package, p. 190.) However, while the Charter School will not provide transportation services, the District does provide transportation to Cold Springs and, in inclement weather, to Long Barn (2018 Exhibit Package, p. 193). Students from the Pinecrest area are thus assured safe and convenient transportation to and from Twain Harte School, rendering the Charter School unnecessary.

g. **District-wide projections predict a continuing steady decline in enrollment.**

As if the evidence above were not sufficient, it is indisputable in light of the numbers below that the steady decline in District enrollment has continued after the closure of Mountain Oaks:

<b><u>School Year</u></b>	<b><u>District ADA/Enrollment</u></b>
2014-2015	282.2 / 296
2015-2016	267.23 / 274
2016-2017	253.47 / 271
2017-2018	252.57 / 264
2018-2019	246.81 / 254
2019-2020	260.38 / 276

Moreover, the District projects that enrollment will continue to decrease in the foreseeable future, continuing the last decade's trend:

<b><u>School Year</u></b>	<b><u>Projected District ADA/ Enrollment</u></b>
2020-2021	227.18 / 238
2021-2022	224.85 / 236
2022-2023	224.85 / 236

By extrapolation, this means that Charter School enrollment, far from increasing, as projected by Petitioners, will actually decrease.

2. **The Charter School’s viability is premised on inaccurate revenue projections, which are in turn premised on inaccurate enrollment projections, therefore presenting an unrealistic financial and operational plan.**

As noted in Section V.B.1.b. of these Findings of Fact, the 2019 Petition’s reduction in projected enrollment as compared to the 2018 Petition will necessarily translate into a reduction in revenues. Furthermore, because even the reduced 2019 Petition’s enrollment projections are overstated, it follows that the revenue projections will be even more negatively impacted as well.

For example, and very importantly, Petitioners’ LCFF calculations are flawed because they are based on flawed enrollment projections, as explained in detail in Section V.B.1. of these Findings of Fact. The fact that Petitioners’ LCFF calculations are flawed is especially concerning because this funding mechanism represents an extremely large portion of the Charter School’s proposed revenues: **98%** of the Charter School’s proposed revenues for each of the first five years of operation. (See 2019 Exhibit Package, pp. 136-137.)

3. **Petitioners have also presented an unrealistic financial and operational plan for the Charter School because the 2019 Petition fails to include budget notes that clearly describe assumptions on revenue estimates.**

The 2019 Petition fails to include budget notes that clearly describe assumptions on revenue estimates (see 2019 Exhibit Package, pp. 130-162), in violation of California Code of Regulations, title 5, section 11967.5.1(c)(3)(B)(3).

For instance, there is no basis to validate the accuracy of employee salary and benefit projections due to the absence of a salary schedule and benefit package information. (See 2019 Exhibit Package, pp. 133-134, 137-138.) While Petitioners indicate their intention to offer competitive salaries and benefits to hire highly qualified certificated and non-certificated staff (see 2019 Exhibit Package, p. 57), the personnel costs projections on their own are insufficient to support such an intention. (See 2019 Exhibit Package, pp. 133-134, 137-138.)

Even more worrisome, however, is the fact that, due to the carelessness with which the 2019 Petition was prepared and formatted, it is not possible to easily or clearly decipher to what information the assumptions provided belong. (See 2019 Exhibit Package, pp. 140-143.)

4. **Petitioners have not demonstrated successful experience in operating and managing a charter school.**

The 2019 Petition provides information about its “Founding Group,” the members of which, with the exception of Ms. Lupo, comprise the initial Charter School Board of Directors. (See 2019 Exhibit Package, pp. 8-9, 55.) None of the information provided shows that any of these individuals possess the required experience to operate a charter school: While Peggy Herndon and Chucker Twining have

experience working for a school district and experience as a school board member, respectively, the 2019 Petition does not discuss any charter school operation experience or experience with the challenges that accompany working with such a small educational organization. While Courtney Sutton has experience working at the college level, she does not have any K-12 educational experience at all. Neither does Mike Yaley. Finally, neither John Cashman nor Ron Berry have experience in the educational field at all.

5. **Petitioners have not developed a comprehensive plan for attracting and retaining the highly trained and experienced personnel called for in the 2019 Petition.**

The 2019 Petition sets the bar quite high for the qualifications and responsibilities of the Lead Teacher, the Business Development and Operations Coordinator, and the Administrative Assistant. All three will have to wear many hats, but the 2019 Petition does not convincingly explain how these individuals will be attracted and retained, especially in such a small community, and especially when the Charter School will not have the District resources backing it. As a side note, the 2019 Petition does not recognize that this situation could very easily lead to burnout, a factor that contributed to the closing of a similar school in the Pinecrest area only a few years ago. (See Section V.B.1.d. of these Findings of Fact.)

The Lead Teacher, for instance, will not only teach, but also fulfill an extensive administrative role, requiring not only a teaching credential, but also an administrative credential. (2019 Exhibit Package, pp. 57-58, 63-65.) He or she will be responsible for the following administrative duties, among others:

- Ensure the Charter School enacts its mission.
- Supervise and evaluate teachers and staff.
- Communicate with and report to the Board of Directors.
- Participate in and implement professional development workshops.
- Serve or appoint a designee to serve on Charter School committees.
- Interview and recommend employee hiring, promotion, discipline, and/or dismissal.
- Communicate with parents, recruit new families and students, and assure families of academic growth.
- Take steps to ensure student attendance in accordance with policies established by the Board of Directors.
- Complete and submit documents as requested or required by the charter, the Board of Directors, and/or the District.
- Identify the staffing needs of the Charter School and offer staff development.
- Maintain up-to-date financial records.
- Ensure that appropriate evaluation techniques are used for both students and staff.
- Hire qualified substitute teachers.
- Ensure the security of school facilities.
- Encourage and support teacher professional development.
- Manage student discipline and participate in the suspension and expulsion process.
- Participate in IEP meetings.
- Oversee the independent study program, including meeting with students on a weekly basis.

- Coordinate testing.
- Manage the special education program.

(2019 Exhibit Package, pp. 57-58.)

The Business Development and Operations Coordinator will be responsible for the following duties, among others:

- Ensure the Charter School enacts its mission.
- Communicate with and report to the Board of Directors.
- Oversee school finances to ensure financial stability.
- Participate in and implement professional development workshops.
- Communicate with parents, recruit new families and students, and assure families of academic growth.
- Complete and submit documents as requested or required by the charter, the Board of Directors, and/or the District.
- Identify the staffing needs of the Charter School and offer staff development.
- Maintain up to date financial records.
- Ensure that appropriate evaluation techniques are used for both students and staff.
- Establish and maintain a system to handle organizational tasks such as student records, teacher records, teacher credentialing information, contemporaneous attendance logs, purchasing, budgets, and timetables.
- Ensure compliance with all applicable state and federal laws and help secure local grants.
- Interview and recommend employee hiring, promotion, discipline, and/or dismissal.
- Maintain up-to-date financial records.
- Promote the Charter School in the community, promote positive public relations, and interact effectively with the media.
- Attend meetings with the District on fiscal oversight issues as requested by the District.
- Provide all necessary financial reports as required for proper attendance reporting.
- Develop the school annual performance report, the School Accountability Report Card, and the Local Control and Accountability Plan.
- Present an independent fiscal audit to the Board of Directors and, after review by the Board of Directors, submit the audit to the District, the Tuolumne County Superintendent of Schools, the State Controller, and the California Department of Education.
- Manage day-to-day operations and facilities.
- Contract and oversee an independent fiscal audit.

(2019 Exhibit Package, pp. 58-59.)

In turn, the Administrative Assistant will not only fulfill an administrative role, as the title suggests, but will also assist with food service, in classrooms as an instructional aide, with yard duty supervision, and with custodial and janitorial duties. (2019 Petition, p. 59.) As if this were not enough, the 2019 Petition states that additional duties and responsibilities may be assigned to the Administrative Assistant. (2019 Petition, p. 59.)

C. **The 2019 Petition does not contain reasonably comprehensive descriptions of all 15 elements specified in Education Code section 47605(b)(5).**

1. **The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(A) that a charter school petition contain a reasonably comprehensive description of the educational program of the charter school.**

The 2019 Petition does not contain a reasonably comprehensive description of the educational program of the Charter School because it does not address how academic development appropriate for each grade level will be accomplished in the context of the Charter School's multi-grade classrooms and because it is unsatisfactory in its discussion of the Charter School's special education and independent study programs, as discussed in more detail in Section V.A. of these Findings of Fact.

2. **The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(E) that a charter school petition contain a reasonably comprehensive description of the qualifications to be met by individuals to be employed by the charter school.**

The 2019 Petition does not contain a reasonably comprehensive description of the qualifications to be met by individuals to be employed by the Charter School because it does not address what non-instructional staff the Charter School expects to employ and what experience is appropriate for each of those positions, with the exception of the Business Development and Operations Coordinator and the Administrative Assistant (see 2019 Exhibit Package, pp. 58-59). Further, the 2019 Petition indicates that it seeks to employ non-certificated instructional support staff in some cases but does not provide any information whatsoever regarding their qualifications. (See 2019 Exhibit Package, p. 63.) Lastly, the 2019 Petition makes no reference to the qualifications of instructional aides.

3. **The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(F) that a charter school petition contain a reasonably comprehensive description of the procedures that the charter school will follow to ensure the health and safety of pupils and staff.**

The 2019 Petition does not contain a reasonably comprehensive description of the procedures that the Charter School will follow to ensure the health and safety of pupils and staff. As a matter of fact, the 2019 Petition fails to provide a comprehensive description of almost every legally required component of such procedures, such as:

- Routine and emergency disaster procedures.
- Policies pursuant to Education Code section 48915(d) for pupils who committed an act listed in Education Code section 48915(c) and other school-designated serious acts that would lead to suspension, expulsion, or mandatory expulsion recommendations pursuant to Education Code section 48900 et seq.

- Procedures to notify teachers of dangerous pupils pursuant to Education Code section 49079.
- A discrimination and harassment policy.
- Procedures for safe ingress and egress of pupils, parents, and school employees to and from the Charter School.
- A safe and orderly environment conducive to learning.

(See Education Code section 32282(a)(2)(A)-(H).)

Moreover, the 2019 Petition itself acknowledges that it does not contain a comprehensive health and safety plan but rather only an early draft thereof. (See 2019 Exhibit Package, p. 66.) Instead, the 2019 Petition merely promises that a full draft will be provided in the future, and that the early draft is included in the appendices. (2019 Exhibit Package, p. 66.) However, the appendices are devoid of such an early draft. (See 2019 Exhibit Package, pp. 102-197.) The health and safety information Petitioners do provide is deficient, because it lacks the comprehensive descriptions of the items enumerated above.

4. **The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(G) that a charter school petition contain a reasonably comprehensive description of the means by which the charter school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.**

The 2019 Petition does not contain a reasonably comprehensive description of the means by which the Charter School will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the District. The 2019 Petition fails to state what the racial and ethnic makeup of the area is and therefore how the Charter School will specifically target such racial and ethnic groups to achieve balance among its pupils. (See 2019 Petition, p. 72.)

5. **The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(K) that a charter school petition contain a reasonably comprehensive description of the manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.**

The 2019 Petition does not contain a reasonably comprehensive description of the manner by which Charter School staff members will be covered by STRS, PERS, or federal social security. The 2019 Petition does state that certificated employees shall participate in STRS and that non-certificated full-time staff shall participate in PERS and federal social security. (2019 Exhibit Package, p. 93.) However, the 2019 Petition does not set forth the appropriate arrangements that must be made in conjunction with retirement coverage. (See 2019 Exhibit Package, p. 93.) Additionally, the 2019 Petition fails to reference the notice requirement of Education Code section 47611(b), whereby the Charter School must inform all employment applicants of the retirement system options available,

specifically that accepting employment in the charter school may exclude the applicant from further coverage in the applicant's current retirement system.

**C. The 2019 Petition does not contain all the information regarding the proposed operation and potential effects of the Charter School required by Education Code section 47605(g).**

**1. The 2019 Petition fails to provide adequate or accurate information related to the facilities to be used by the Charter School.**

The 2019 Petition identifies the District's former Pinecrest School as the site for the operation of the Charter School, supported by a letter from the owner of the building, the Pinecrest Permittees Association, indicating a mutual intention to enter into a lease agreement. (2019 Exhibit Package, pp. 98, 164.) However, the 2019 Petition fails to provide much information about the facility, including its current condition and what repairs/maintenance and permits will be required for operation of the Charter School. (See 2019 Exhibit Package, p. 98.) Further, the facility has yet to be secured. (See 2019 Exhibit Package, p. 164.) Indeed, the 2019 Petition contemplates only a July 1, 2019 to June 30, 2020 lease. (2019 Exhibit Package, p. 164.) A renewal by mutual agreement would apply for July 1, 2020 forward (2019 Exhibit Package, p. 164), creating uncertainty with respect to the Charter School's long-term location. The 2019 Petition itself acknowledges the possibility that the former Pinecrest School site may become unavailable, in which case the Charter School would have to be relocated to another facility in the Pinecrest area. (2019 Exhibit Package, p. 99.)

Additionally, the 2019 Petition indicates that the Charter School's lease will be \$18,000 for the 2020-2021 school year. (2019 Exhibit Package, p. 133.) The 2019 Petition does not explain how Petitioners arrived at \$18,000 as compared to the \$72,000 in lease payments projected for the 2020-2021 school year in the 2018 Petition. (See 2018 Exhibit Package, p. 114.) On the one hand, Petitioners may have understated lease payments in the 2019 Petition in order to reduce expenses and thereby compensate for reduced revenue. On the other hand, ironically, this reduction in lease payments in turn results in a reduction in revenue. The financial information provided by Petitioners shows a cash flow of \$250,000 from "Other Sources" for the 2020-2021 school year, which is actually money from a Charter School Facility Grant. (See 2019 Exhibit Package, p. 139.) Charter School Facility Grants are awarded to provide annual assistance with rent and lease expenditures for charter school facilities based on the units of classroom-based ADA, up to 75% of annual facilities rent and lease costs. (2019 Exhibit Package, p. 326.) Because the 2019 Petition provides for \$18,000 in annual lease payments for the 2020-2021 school year, the most the Charter School could receive from the Charter School Facility Grant would be 75% of \$18,000, or \$13,500, which is \$236,500 less than the \$250,000 included in the 2019 Petition's financial information. The 2019 Petition does not indicate where these \$236,500 would otherwise come from.

2. **The 2019 Petition fails to provide complete or convincing information regarding the manner in which the Charter School's administrative services will be provided.**

The 2019 Petition states that the Charter School will provide or procure administrative services either through its own staff or through an appropriately qualified third party contractor. (2019 Exhibit Package, p. 98.) The 2019 Petition does indicate that the Lead Teacher, the Business Development and Operations Coordinator, and the Administrative Assistant will fulfill administrative roles (2019 Petition, pp. 57-59), but the 2019 Petition does not set forth a specific plan for handling business and/or personnel related services (e.g., retirement system reporting, taxes, withholdings, workers' compensation insurance, credential compliance, W-2 and W-9 processing, etc.).

Further, the Charter School will rely on ICON School Management Services ("ICON"), formerly known as SavantCo Education ("SavantCo") (2019 Exhibit Package, p. 261), to be its back office provider (2019 Exhibit Package, p. 9), but this selection is fraught with problems. First, SavantCo is the back office provider identified in the 2018 Petition (2018 Exhibit Package, p. 9) and to which some of the lack of success of the 2018 Petition was attributed by Petitioners. Second, ICON may not be the most reliable option, even putting aside Petitioners' experience with SavantCo in the context of the 2018 Petition. In 2016, the Fiscal Crisis & Management Assistance Team ("FCMAT") conducted an audit of Hope Academy Charter School, which employed SavantCo, ICON's predecessor, as its back office provider. (See 2019 Exhibit Package, pp. 264-322.) FCMAT considered alleged fraud, misappropriation of funds, and other criminal activity involving SavantCo and concluded that these may all have occurred. (2019 Exhibit Package, pp. 275, 300.) As such, the partnership between the Charter School and ICON further brings into question whether Petitioners can successfully implement the educational program set forth in the 2019 Petition.

## VI. **Conclusion**

Based on the Staff Team's thorough and careful review of the 2019 Petition as well as public input received at the public hearing held on October 23, 2019, the District recommends that the Board adopt these Findings of Fact and deny the 2019 Petition for the reasons detailed above.

To summarize once again, the District recommends that the Petition be denied based on the following conclusions:

1. The Charter School presents an unsound educational program for the pupils to be enrolled therein. As discussed further in Section V.A. of these Findings of Fact, the Petition does not address how academic development appropriate for each grade level will be accomplished in the context of the Charter School's multi-grade classrooms, does not provide for sufficient days of instruction, and is unsatisfactory in its discussion of the Charter School's special education and independent study programs.

2. Petitioners are demonstrably unlikely to successfully implement the program set forth in the 2019 Petition. As discussed further in Section V.B. of these Findings of Fact, the Charter School's enrollment projections are problematic and its viability is premised on inaccurate revenue projections. In addition, Petitioners have not demonstrated successful experience in operating and managing a charter school and have not developed a comprehensive plan for attracting and retaining the highly trained and experienced personnel called for in the 2019 Petition.
  
3. The 2019 Petition does not contain reasonably comprehensive descriptions of all 15 elements specified in Education Code section 47605(b)(5). As discussed further in Section V.C. of these Findings of Fact, the 2019 Petition does not contain a reasonably comprehensive description of the Charter School's educational program, the qualifications of Charter School employees, the procedures the Charter School will follow to ensure the health and safety of pupils and staff, the means by which the Charter School will achieve a racial and ethnic balance among its pupils that is reflective of the surrounding general population, and the manner in which staff members of the Charter School will be covered by STRS, PERS, or federal social security.
  
4. The 2019 Petition does not contain all the information regarding the proposed operation and potential effects of the Charter School required by Education Code section 47605(g). As discussed further in Section V.D. of these Findings of Fact, the 2019 Petition fails to provide adequate or accurate information related to the facilities to be used by the Charter School and complete or convincing information regarding the manner in which the Charter School's administrative services will be provided.



November 26, 2019

**VIA HAND DELIVERY**

Supt. Cathy A. Parker  
Tuolumne County Board of Education  
175 Fairview Lane  
Sonora CA 95370

<b>Re:</b>	<b>Appeal of the Pinecrest Expedition Academy Charter School Petition on Denial from the Twain Harte School District</b>
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This letter is submitted on behalf of the Pinecrest Expedition Academy (“PEA, the Charter School, or PEA”) charter school petition, specifically rebutting the Twain Harte School District’s (the “District”) findings of fact.

1. The 2018 Petition

The fact that the Charter School submitted a petition in 2018 is, of course, irrelevant and not part of any “procedural history” that can be considered by the Tuolumne County Office of Education or Board of Education. The District has included this information purely as a distraction, and the Ed. Code requirements for review of a charter petition either by the District or on appeal to the County do not bring this alleged “procedural history” into consideration<sup>[H1]</sup>. The District’s statement that the operated the Pinecrest School for over thirty years is also inaccurate. The District took over the Pinecrest School in or around July 1995 and closed the school in or around June 2012, a period of seventeen years. The operation of the school prior to that period was through the Columbia School District.

2. The Charter School Presents an Unsound Educational Program for the Pupils to Be Enrolled in the Charter School. [Ed. Code§ 47605(b)(1)]

- a. The 2019 Petition does not address how academic development appropriate for each grade level will be accomplished in the context of the Charter School’s multi-grade classrooms.

The Petition in Elements 2 and 3 clearly define and list the Measurable Student Outcomes and Methods of Assessments of Student Progress. This information clearly outlines the objectives of the programs and the academic achievement goals. This information is intended to align with all applicable State Standards

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and Methods of Assessment and will be used in the multi-grade classroom. The Petition also clearly outlines the use of Personalized Learning in a Multi Grade Classroom on pages 18 and 19.

- b. The 2019 Petition does not provide for sufficient days of instruction.

RESPONSE: PEA is offering more days of instruction than is currently required for charter schools. The fact that the District believes they should offer more days when there is a simple delta of four days is hardly evidence to support a “finding” that the number of instructional days is insufficient.

PEA’s instructional calendar meets the requirements of law and is therefore sufficient on its face to meet the requirements of the Charter Schools Act.

- c. The 2019 Petition is unsatisfactory in its discussion of special education.

RESPONSE: Given the small school enrollment proposed in the initial five years of operation, the budget sufficiently accounts for anticipated special education needs. In addition, the school can carry sufficient insurance to provide for more than adequate defense costs should a due process hearing be required. Finally, membership in the Tuolumne County SELPA is not required nor mandated. PEA can apply for membership in other SELPAs with specific expertise in serving special education students.

- d. The 2019 Petition is unsatisfactory in its discussion of the Charter School’s independent study program.

RESPONSE: The discussion of the independent study program is sufficient. PEA has more than sufficient support to ensure that an appropriate board policy and master agreement is adopted and to ensure that the requirements of the program are legally compliant in all respects. The meeting requirements identified in the findings as a “deficiency” are, in fact, simply the requirements of pertinent regulations governing independent study programs.

3. The Petitioner is Demonstrably Unlikely to Successfully Implement the Program Set Forth in the Petition. (Educ. Code§ 47605(b)(2).)

- a. 1. The Charter School’s enrollment projections are problematic.  
i. a. The number of signatures provided in support of the 2019 Petition inflate the Pinecrest community’s interest in Charter School attendance.

RESPONSE: Without evidence, the District has arbitrarily invalidated seven parent signatures. Assuming arguendo the District is even correct, the number of validated signatures still meets the first year 50%+ enrollment requirement of law. The signatures must be considered as meetings the requirements of the Charter Schools Act as

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a result and cannot be arbitrarily discounted or invalidated by the District.

The District's contention that the number of signatures *which they verified as legally compliant* "falls short" of the 52 first year student enrollment has no merit. That is not the legal standard by which the signatures must be judged. The legal requirement is that "[t]he petition is signed by a number of parents or legal guardians of pupils that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the charter school for its first year of operation." *Ed. Code* section 47605(a)(1)(A). The petition *exceeds* this requirement.

- ii. Petitioners base the Charter School's enrollment projections on unsubstantiated optimism.

RESPONSE: By the District's own admission, 32 of the first year projected enrollment of 52 are meaningfully interested parents. As a result, the enrollment projections are not only sufficient as a matter of law but are entirely within reason. The modest growth projections

- iii. The District's Pinecrest School closure is evidence of declining enrollment not only at the Pinecrest School itself, but also District-wide.

RESPONSE: As noted above, the intent to enroll forms reflect 62% of total enrollment in the first year by the District's own admission. As with many small school Districts, declining enrollment could be due to a number of factors that the District has not considered, including the fact that the enrollment may still be present but simply choosing other homeschooling or independent study options. PEA may be a welcome addition to many parents as a result, and the District has offered no evidence otherwise.

- iv. The brief existence of the Mountain Oaks Charter School Pinecrest Campus supports the District's conclusion that the Charter School is doomed to fail.

RESPONSE: Comparing what occurred to a completely different school over 7 years ago is disingenuous at best, but it is also simply irrelevant and provides no evidence of the support that PEA does have in the community at present.

- v. The Tuolumne County Superintendent of Schools Office's return of PEA's early2018 countywide charter petition supports the District's finding that the Charter School will not attract students from

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throughout Tuolumne County but that, rather, the Charter School's very limited student population will be drawn from Pinecrest itself and its immediate environs.

RESPONSE: The District's argument is non-sensical. A countywide charter petition must state an entirely different purpose, depending on the .5 or .6 designation, than a District authorized charter school. PEA's petition must be judged on its merits, not by comparison to the requirements for a countywide charter petition.

- vi. The fact that the Charter School will not offer transportation services further limits the Charter School's enrollment pool.

RESPONSE: As noted above, the intent to enroll forms reflect 62% of total enrollment in the first year by the District's own admission. As with many small school Districts, declining enrollment could be due to a number of factors that the District has not considered, including the fact that the enrollment may still be present but simply choosing other homeschooling or independent study options. PEA may be a welcome addition to many parents as a result, and the District has offered no evidence otherwise. The fact that the intent to enroll forms do support more than a majority of the first year enrollment suggest that parent support, notwithstanding any transportation issues, is sufficient to support the projected enrollment in the school.

- vii. District-wide projections predict a continuing steady decline in enrollment.

RESPONSE: Once again, the intent to enroll forms submitted by PEA reflect 62% of total enrollment in the first year by the District's own admission. As with many small school Districts, declining enrollment could be due to a number of factors that the District has not considered, including the fact that the enrollment may still be present but simply choosing other homeschooling or independent study options. PEA may be a welcome addition to many parents as a result, and the District has offered no evidence otherwise.

- b. The Charter School's viability is premised on inaccurate revenue projections, which are in turn premised on inaccurate enrollment projections, therefore presenting an unrealistic financial and operational plan.

RESPONSE: The District must necessarily belabor the enrollment projections because that is the crux of their entire objection to the petition; as stated above, if the enrollment projections are reasonable, which they are, then this finding regarding the revenue of PEA is, ipso facto, unreasonable.

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- c. Petitioners have also presented an unrealistic financial and operational plan for the Charter School because the 2019 Petition fails to include budget notes that clearly describe assumptions on revenue estimates.

RESPONSE: All revenue and expense assumptions were disclosed in the Budget Narrative under the budget section hearing. In addition, the petition includes detailed Salaries and Benefits worksheets, which present all assumptions for Object Codes 1000 through 3000.

- d. Petitioners have not demonstrated successful experience in operating and managing a charter school.

RESPONSE: As the District has never operated a charter school, this “finding” is necessarily a reflection of the District’s understanding of the purported lack of experience of the charter petitioners/founders. PEA has enlisted the support of highly qualified experts to assist them in their endeavor and having worked with charter schools for over twenty years our team has seen many different successful charter school implementations from persons with no formal educational training at all.

- e. Petitioners have not developed a comprehensive plan for attracting and retaining the highly trained and experienced personnel called for in the 2019 Petition.

RESPONSE: The job market in California is ever changing. A plan specific to today may be irrelevant in a year. Given the attractive location of the program, homes available for purchase and rental. Higher starting salaries than other programs in the state, PEA is confident that the board can develop an annual plan for staff hiring and recruitment based on needs at the time.

4. The Petition Does Not Contain Reasonably Comprehensive Descriptions of All Elements Required under Education Code Section 47605.6(b)(5).

- a. The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(A) that a charter school petition contain a reasonably comprehensive description of the educational program of the charter school.

RESPONSE: The Petition provides a thorough description of the program in Element 1. The petition lists examples of textbooks to be used, the intention to align each subject to state standards and a summary of each subject. The Petition also includes supplementary information for EL Education in the Appendix and descriptions of project- based learning, personalized learning as well as the inclusion of a Natural Elements philosophy in the curriculum.

The Petition also includes staffing for special education. In addition to contracted special education personnel, page 64 of The Petition States, “ One Independent Study teacher (at minimum) will spend one day per week

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providing Special Education services on campus. Thus the Independent Study must possess all needed and applicable licensing and credentials for this purpose.”

As noted above, the discussion of special education and independent study is sufficient for purposes of the Charter Schools Act. This office has extensive experience representing schools in special education matters, as well as schools operating independent study programs. Our support will be more than sufficient to ensure PEA operates in accordance with all applicable legal requirements.

- b. The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(E) that a charter school petition contain a reasonably comprehensive description of the qualifications to be met by individuals to be employed by the charter school.

RESPONSE: The mere fact that the petition does not necessarily include job descriptions for all non-instructional staff and instructional aides is not a deficiency warranting a finding for purposes of the Charter Schools Act. This finding is deficient as a matter of law and should not be considered as evidence of a failure to provide a reasonably comprehensive description of the individuals to be employed by the charter school.

- c. The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(F) that a charter school petition contain a reasonably comprehensive description of the procedures that the charter school will follow to ensure the health and safety of pupils and staff.

RESPONSE: Not a single item listed in this finding is required by law to be included in a comprehensive manner in a charter petition, with the exception of suspension and expulsion procedures, which the petition does address at great length and in complete conformance with the law. In fact, these same suspension and expulsion procedures have been reviewed and approved by numerous Districts, County Board of Education and the State Board of Education.

Notwithstanding this fact, the remaining items are properly addressed in school policies and procedures and/or school safety and risk management plans that are not requirements of a charter petition but are, in fact, adopted by a charter school board after approval of the charter petition.

- d. The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(G) that a charter school petition contain a reasonably comprehensive description of the means by which the charter school will achieve a racial and ethnic balance among its pupils that is reflective of the

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general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.

RESPONSE: This finding cites erroneously to the requirements of law. As plainly stated in Education Code section 47605(b)(5)(G), this element of a charter petition must address the “means by which the charter school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.” The petition adequately addresses these “means” on page 72 of the charter petition. There is absolutely no requirement under the law to state what the racial and ethnic makeup of the school district actually is.

- e. The 2019 Petition does not meet the requirement of Education Code section 47605(b)(5)(K) that a charter school petition contain a reasonably comprehensive description of the manner by which staff members of the charter school will be covered by the State Teachers’ Retirement System, the Public Employees’ Retirement System, or federal social security.

RESPONSE: As with the previous finding, this finding too cites erroneously to the requirements of law. Nowhere in our experience has a finding ever stated that a charter petition must state the “appropriate arrangements that must be made in conjunction with retirement coverage,” nor the notice requirement of Education Code section 47611(b). These procedural requirements are just the tip of the iceberg with regards to the administrative requirements for establishing and maintaining enrollment in CalSTRS or CalPERS. A charter petition is simply not required to specify the level of procedural detail to which the District refers.

5. The 2019 Petition does not contain all the information regarding the proposed operation and potential effects of the Charter School required by Education Code section 47605(g).
  - a. The 2019 Petition fails to provide adequate or accurate information related to the facilities to be used by the Charter School.

RESPONSE: The charter petition adequately addresses the facility requirements of the Charter Schools Act by providing, as indicated by the letter from the owner of the Pinecrest Permittees Association. The level of the detail the District requires is nowhere required by the Charter Schools Act.

The lease payment was disclosed in the Budget Narrative under the budget section heading in the petition (refer to Section 3.3, Services and Operating expenses). According to the letter of intent, the Charter School will pay \$1,500 per month in the first year, and this amount was projected and budgeted accurately in the budget.

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- b. The 2019 Petition fails to provide complete or convincing information regarding the manner in which the Charter School's administrative services will be provided.

RESPONSE: As a matter of first impression (and as is common throughout the District's findings), the District refers to non-existent requirements of the Charter School Act when it implies that a charter petition must include administrative or procedural information concerning retirement system reporting, taxes, withholdings, workers' compensation insurance, credential compliance or W-2 and W-9 processing. Most of these items are managed by a payroll services provider or an insurance company. Credential compliance is not a function of an administrative services provider but is rather a core function of the school administration.

Finally, it is surprising that the District would make what amounts to a defamatory statement about ICON School Management Services based on the FCMAT report referenced. While it is no concern of this office, we find the conclusion the District has reached about this FCMAT report erroneous and, quite frankly, surprising with regarding to ICON School Management Services.

### **Conclusion**

As explained in the responses above, the District has not provided findings of fact that warrant denial of the Pinecrest Expedition Academy charter school petition, and we respectfully ask the Tuolumne County Board of Education consider these responses during its deliberations of the Pinecrest Expedition Academy appeal.

Sincerely,  
HANSBERGER & KLEIN  
A Professional Law Corporation



Richard J. Hansberger