California Department of Education

Charter Schools Division

Created 03/2024

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Attachment 32

# Nonclassroom-Based Funding Determination Request

CALIFORNIA DEPARTMENT OF EDUCATION

This document presents the determination of funding request for Valley Oaks Charter (charter #332). Information from the school has been exported from the web-based Funding Determination Form at [Nonclassroom-Based Determination of Funding - Charter Schools (CA Dept of Education)](https://www.cde.ca.gov/sp/ch/nclrbifunddet.asp#form).

Responses from the school have been provided, as is, and have not been edited by the California Department of Education for capitalization, punctuation, or spelling.

## Valley Oaks Charter Determination of Funding Request 2023–24

### Section 1. General Information

Charter School Information

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Charter School Name | Valley Oaks Charter School |
| Charter School Authorizer | Kern County Superintendent of Schools |
| Charter School Number | 332 |
| County District School (CDS) Code | 15-10157-1530492 |
| Street Address | 3401 Chester Ave |
| City | Bakersfield |
| County | Kern |
| ZIP Code | 93301 |
| Grade Levels Served | TK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12 |
| Date Charter Expires | 6/30/2028 |
| Contact First Name | Becky |
| Contact Last Name | Bartz |
| Contact Title | Director II |
| Contact Phone Number | 661-636-4428 |
| Contact Email Address | bebartz@kern.org |

Funding Determination Request Information

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Is this a reconsideration request? | No, this is not a reconsideration request. |
| Requested Funding Level | 100% |
| Beginning Period Requested | FY 2024–25 |
| Number of Years Requested | 5 |
| Source Data | FY 2022–23 Audit |
| If the source data used was “Other”, provide a description. | [No Response] |

### Section 2. Financial Information

#### A. Total Resources

Revenues and Other Resources

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Federal Revenues[[1]](#footnote-1) | $65,481 |
| Public Charter School Grant Program Funds (separately identified) | $0 |
| State Revenues[[2]](#footnote-2) | $15,133,620 |
| In-Lieu of Property Taxes (separately identified) | $2,791,869 |
| Local Revenues | $142,952 |
| Other Financing Sources | $0 |
| **Total Revenues** | **$15,342,053** |

**If Other Financing Sources were reported, provide a description:**

[No Response]

#### B. Total Expenditures and Other Uses

Instruction and Related Services

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Certificated Salaries and Benefits for Instruction and Related Services | $7,845,871 |
| Classified Salaries and Benefits | $1,189,498 |
| Books, Supplies, and Equipment | $429,089 |
| Services and Other Operating Costs: Contracts for Instructional Services | $401,993 |
| Services and Other Operating Costs: Contracts for Instructional Support | $942,772 |
| Services and Other Operating Costs: All Other Instruction Related Operating Costs | $27,807 |
| **Total Instruction and Related Services** | **$10,837,030** |

Operations and Facilities

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Certificated Salaries and Benefits | $0 |
| Classified Salaries and Benefits | $315,961 |
| Books, Supplies, and Equipment | $24,021 |
| Services and Other Operating Costs | $409,519 |
| Facilities Acquisition and Construction | $86,665 |
| **Total Operations and Facilities** | **$836,166** |

Allowable Facilities Costs

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Total facility square footage occupied by the charter school | 77412 |
| Enter total classroom-based P-2 ADA reported in the prior fiscal year. Do not include nonclassroom-based ADA. | 0 |
| Enter total student hours attended by nonclassroom-based pupils at the school site in the prior fiscal year. | 238746 |
| Calculated Facilities Costs | $275,053 |
| **Allowable Facilities Costs** | **$275,053** |

Administration and All Other Activities

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Certificated Salaries and Benefits | $70,453 |
| Classified Salaries and Benefits | $0 |
| Books, Supplies, and Equipment | $0 |
| Contracts for Other Administrative Services | $0 |
| Supervisorial Oversight Fee | $0 |
| All Other Administration and Other Activities, Services, and Operating Costs | $0 |
| **Total Administration and Other Activities** | **$70,453** |

Other Outgo and Other Financing Uses

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Debt Services | $328,692 |
| Transfers to Local Educational Agencies | $0 |
| All Other Transfers and Outgo | $0 |
| **Total Other Outgoing and Other Financing Uses** | **$328,692** |

**Describe the nature of the transaction(s) for Transfers to Local Educational Agencies and identify the accounts or entities involved in the transfer(s).**

[No Response]

**Describe the nature of the transaction(s) for All Other Transfers and Outgo and identify the accounts or entities involved in the transfer(s).**

[No Response]

#### C. Fund Balance

Total Expenditures and Fund Balance

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Total Expenditures | $12,072,341 |
| Revenues Over Expenditures | $3,269,712 |
| Beginning Fund Balance | $6,239,138 |
| **Ending Fund Balance – June 30** | **$9,508,850** |

#### D. Reserves

Reserves

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Designated for Economic Uncertainties | $603,617 |
| Facilities Acquisition or Capital Projects | $3,000,000 |
| Reserves Required by Charter Authorizer | $0 |
| Other Reserves | $0 |
| Unassigned/Unappropriated Fund Balance | $5,905,233 |
| **Total Reserves** | **$9,508,850** |

Reserves as a Percentage of Total Expenditures

| **Reserves** | **Percentage of Total Expenditures** |
| --- | --- |
| Designated for Economic Uncertainties | 5.00% |
| Facilities Acquisition or Capital Projects | 24.85% |

**Explanation for reserves designated for economic uncertainties if these reserves exceed the greater of $50,000 or 5 percent of total expenditures:**

[No Response]

**Explanation of Other Reserves:**

[No Response]

**Explanation for reserves designated for facilities acquisition or capital projects if these reserves exceed the greater of $50,000 or 5 percent of total expenditures:**

The California high speed rail will pass through our current school location, prompting the new for new facilities. These funds will assist in mitigating some of the construction costs when the new facility project commences in the fiscal year 2024-2025.

**Explanation of school’s unassigned/unappropriated fund balance and details regarding the school’s plans for these funds: *(Optional)***

[No Response]

### Section 3. Pupil-Teacher Ratio

Pupil-Teacher Ratio

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| FY 2022–23 Average Daily Attendance for independent study pupils | 1128.29 |
| FY 2022–22 Full-Time Equivalent certificated employees responsible for independent study | 48.55 |
| Among the unified school districts in the county or counties in which the charter school operates, do any districts report a PTR greater than 25 to 1? | [No Response] |
| Provide the name of the unified school district that reports a PTR greater than 25 to 1. | [No Response] |
| Enter the PTR for the district above. | [No Response] to 1 |

### Section 4. Funding Determination Calculations

Calculated Percentages

| **Criteria** | **Funding Determination Calculations** |
| --- | --- |
| Percentage Spent on Instructional Certificated Salaries and Benefits to Total Public Revenues | 51.62% |
| Percentage Spent on Instruction and Related Services and Allowable Facility Costs | 72.43% |
| 2022–23 Pupil-Teacher Ratio | 23.24 to 1 |
| Pupil-Teacher Ratio of Largest Unified School District in the County or Counties in which the Charter School Operates | [No Response] to 1 |

### Section 5. Supplemental Information

#### A. Virtual Charter Schools

Virtual Charter Schools

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Is this charter school a virtual or on-line charter school as defined in 5 *CCR* Section 11963.5? | No |
| If yes, can the charter school demonstrate compliance with 5 *CCR* sections 11963.5(b)(2) to (8)? | [No Response] |

#### B. Entity and Contract Information

Entity and Contract Information

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Did any entity receive or will receive $50,000 or more or 10% or more of total expenditures from the school in FY 2022–23 or FY 2023–24? | Yes |
| Number of reportable entities | 3 |

##### List of Reported Entities

Reported Entity 1

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Name of Entity | Kern County Superintendent of Schools |
| Amount | $328,692 |
| Purpose/Explanation | Facilities Construction Loan Payment |
| Are contracts based on specific services rendered? | No |
| If no, are payments based on amount per ADA or some other percentage? | No |

Reported Entity 2

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Name of Entity | Kern High School District |
| Amount | $112,316 |
| Purpose/Explanation | Counselor for 7th-12th graders |
| Are contracts based on specific services rendered? | No |
| If no, are payments based on amount per ADA or some other percentage? | Yes |

Reported Entity 3

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| Name of Entity | Ice House Group |
| Amount | $81,126 |
| Purpose/Explanation | Facilities Lease |
| Are contracts based on specific services rendered? | No |
| If no, are payments based on amount per ADA or some other percentage? | No |

#### C. Current Governing Board Information

##### List of Board Members

Board Member 1

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Desiree |
| Last Name of Board Member | Von Flue |
| Title of Board Member | Charter Board Chair |
| Board Member Type | Chairperson |
| How was this member selected? | Designated |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | N/A |

Board Member 2

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Kristi |
| Last Name of Board Member | Henry |
| Title of Board Member | Principal |
| Board Member Type | Administrator |
| How was this member selected? | Appointed |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 9/2023 to 6/2024 |

Board Member 3

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Kiley |
| Last Name of Board Member | Barton |
| Title of Board Member | Certificated Teacher |
| Board Member Type | TK-8 Teacher |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2021 to 06/2024 |

Board Member 4

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Tania |
| Last Name of Board Member | Gomez |
| Title of Board Member | Certificated Teacher |
| Board Member Type | 9-12 Teacher |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2025 |

Board Member 5

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Lorrie |
| Last Name of Board Member | Roberts |
| Title of Board Member | Certificated Teacher |
| Board Member Type | TK-8 Teacher |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2025 |

Board Member 6

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Valerie |
| Last Name of Board Member | Shick |
| Title of Board Member | Parent |
| Board Member Type | Parent |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2022 to 06/2024 |

Board Member 7

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Maria |
| Last Name of Board Member | Demayo |
| Title of Board Member | Parent |
| Board Member Type | Parent |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2022 to 06/2024 |

Board Member 8

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Sandra |
| Last Name of Board Member | Gutierrez |
| Title of Board Member | Parent |
| Board Member Type | Parent |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2025 |

Board Member 9

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Debra |
| Last Name of Board Member | See |
| Title of Board Member | Community Representative |
| Board Member Type | Community Member |
| How was this member selected? | Recommended |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2024 |

Board Member 10

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Tiffany |
| Last Name of Board Member | Edgerle |
| Title of Board Member | Alternative |
| Board Member Type | Parent |
| How was this member selected? | Elected |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2022 to 06/2024 |

Board Member 11

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Lora |
| Last Name of Board Member | Brown |
| Title of Board Member | KCSOS Appointed |
| Board Member Type | District Representative |
| How was this member selected? | Appointed |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2024 |

Board Member 12

| **Prompt** | **Charter School’s Response** |
| --- | --- |
| First Name of Board Member | Becky |
| Last Name of Board Member | Bartz |
| Title of Board Member | Director |
| Board Member Type | Director |
| How was this member selected? | Appointed |
| Is this board member affiliated in any way with any of the reportable entities listed in the Entity and Contract Information section? | No |
| If so, explain the nature of the affiliation. | [No Response] |
| Board Member Term (MM/YYYY to MM/YYYY) | 09/2023 to 06/2024 |

### Section 6. Mitigating Circumstances

**Explain why the charter school did not meet the criteria for the funding level requested. Include specific measures or actions taken by the charter school to comply. List and explain the mitigating circumstances to be considered by the CDE and ACCS.**

Fiscal: Valley Oaks Charter School did not meet the criteria for the 100% funding level because expenditures on instruction and related services did not equal or exceed 80% of total revenues for fiscal year 2022-23. In fiscal year 2022-2023, the Learning Recovery and Emergency Block Grant (LREBG) and the Arts, Music, and Instructional Materials Block Grant (AMIMBG) accounted for $735,036 and $719,000 in revenue respectively. The charter developed an expenditure plan for each these resources in alignment with the allowable uses, but the planned expenditures of these monies was to take place through fiscal years 2023/24. While closing the books for FY 2022/23, there was uncertainty whether the LREBG funds would be fully funded or reduced. As a result, the charter delayed the expenditure of these resources until final allocations were announced. All LREBG funds are expected to be fully expended by FY 2023/24. The charter also created a music program using the AMIMBG funds, which were planned to be spent beginning fiscal year 2023/24.

Program: As we reflect on the funding level requested for our school, it is imperative to provide transparent insights into the challenges we have faced, particularly in the ongoing COVID-19 pandemic. Like many others, our school has been significantly impacted by the repercussions of the pandemic. Unfortunately, we experienced a loss of six staff members for a variety of reasons. This unexpected depletion of our workforce and the struggle to find new employees has undoubtedly affected our operational capacity and contributed to the complexities we face in meeting the requested funding level. In response to these challenges, we have proactively sought alternative means to bridge the gaps left by the departing staff and address the unique needs arising from the aftermath of the pandemic. We have strategically utilized additional grants to combat learning loss, with a particular focus on addressing challenges related to dyslexia and dysgraphia. Four of our teachers have undergone specialized training to develop a comprehensive reading intervention program aiming to support students facing literacy challenges. Furthermore, recognizing the essential role of individualized support, we have hired tutors and paraprofessionals to provide targeted assistance to students who require additional attention.

We understand that our students' mental health and well-being are paramount, especially in these challenging times. To this end, we have hired a full-time counselor dedicated to addressing our student body's diverse mental health needs, as well as focusing on ensuring our students graduate college or career-ready. Additionally, with the assistance of the Arts and Music Block Grant and Prop 28, we have successfully established a new music program, enriching the educational experience for our students. We have expanded our academic offerings and added Career and Technical Education (CTE) pathways to provide students with practical skills and real-world experiences.

While these initiatives have been made possible through additional grants, it is crucial to acknowledge that these funds have time constraints. We have strategically prioritized spending to ensure the continuity of these invaluable programs and opportunities. Unfortunately, it is anticipated that the majority of these funds will be depleted by the end of this school year. Given these circumstances, we are concerned about sustaining the current programs and initiatives without continued financial support. The 100% funding we are requesting is essential to maintaining the momentum we have built. We sincerely request your understanding and consideration in light of the extraordinary circumstances our school is navigating. We remain committed to the success and well-being of our students, and we are hopeful that, with your support, we can continue to provide them with the high-quality education they deserve.

Thank you for your understanding and continued partnership.

### Section 7. Additional Information

**Provide any other pertinent information that may assist the CDE and ACCS in conducting a detailed review or develop a reasonable basis for a recommendation.**

VOCS was stablished in July 2000, and has been at the forefront of providing exceptional education to over 1,000 TK-12 students/yr and their home teachers through our homeschooling model. At the heart of our success is the unwavering commitment of our dedicated staff and actively engaged parents who consistently strive to enhance services and meet the evolving needs of our students and home teachers.

Parents at Valley Oaks are directly involved in their child's education, fostering a collaborative and supportive learning environment. Our resource teachers are crucial in delivering expert coaching to home teachers, incorporating state-adopted standards-based instructional materials, offering special classes across content areas, providing individual and group tutoring, and facilitating career awareness and exploration of career pathways. The array of offerings includes:

• Enrichment classes.

• Career and Technical Education (CTE) pathways.

• Dual enrollment classes.

• STEAM opportunities.

• Reading intervention programs.

• Student and Parent workshops.

• Special education services.

The rich tapestry of experiences for our students extends beyond the classroom through field trips, visits to college campuses, student government opportunities, and guidance to families. Community partnerships further enrich the learning journey, providing our students with experiences that transcend traditional textbook learning. The longstanding partnership with the Kern County Superintendent of Schools has been invaluable, effectively serving our staff, students, and their families.

This year, VOCS proudly received another six-year term of accreditation for our high school program through WASC, a testament to the dedication and quality of education provided. Our commitment to academic excellence is evident in our rigorous analysis of student performance data. Students undergo the STAR Renaissance test three times a year, along with the CAASPP exam, allowing us to monitor individual progress routinely. Resource teachers collaborate with home teachers to make necessary adjustments to individual student curricula, fostering continuous academic growth. Enrichment classes further support home teachers, providing additional instruction and tutoring in core subject areas. State-adopted materials are seamlessly integrated into all lesson plans, and parent workshops focus on strategies to enhance student academic achievement. In addressing specific needs, reading and math intervention courses have been implemented to assist students below proficiency levels on the STAR and/or CAASPP.

Additionally, students at risk of failing coursework are required to attend an additional day of tutoring with resource teachers, a service also available to any student. Our commitment to inclusive education is evident through the collaboration between Special Education teachers and resource teachers. Strategies provided by Special Education teachers empower resource teachers to effectively work with home teachers, fostering an environment conducive to improved student learning outcomes. In conclusion, the multifaceted educational offerings, strong community partnerships, and proven success in academic achievements underscore the critical need for sustained funding at the current 100% level.

We sincerely appreciate your ongoing support of Valley Oaks Charter School and look forward to the continued success of our students.

### Section 8. Certification

**1) The information provided is true and correct to the best of my ability and knowledge.**

**2) This charter school's nonclassoom-based instruction is conducted for and substantially dedicated to the instructional benefit of the school's students.**

**3) This charter school's governing board has adopted and implemented conflict of interest policies.**

**4) All of the charter school's transactions, contracts, and agreements are in the best interest of the school and reflect a reasonable market rate for all goods, services, and considerations rendered for or supplied to the school.**

**Enter your name below which will serve as a signature and certify agreement with all of the above terms.**

Becky Bartz

**Indicate whether the certification is from the charter school's director, principal, or governing chairperson:**

Director

1. Includes Public Charter Schools Grant Program funds, if applicable [↑](#footnote-ref-1)
2. Includes In-Lieu of Property Taxes, if applicable [↑](#footnote-ref-2)