

## 1. Executive Summary (5-7 pages)

**a. Mission and Vision.** State the mission, vision and core beliefs of the proposed school as well as the school's values about teaching and learning. Include an explanation of what students will know and be able to do as well as the rigorous intellectual habits of mind, essential skills, knowledge and attributes they will possess upon matriculation that will prepare them to be successful adults in the 21<sup>st</sup> Century.

*The mission of our proposed Partnership to Uplift Communities (PUC) Central Region High School #13 (CRHS #13) is to offer every enrolled student a dynamic learning environment within a small community committed to educational excellence and personal integrity. PUC CRHS #13 will guide and nurture its students as they discover and cultivate their unique gifts and talents, challenging each individual to achieve his or her full potential. We will prepare our students to enter and have success in the colleges and universities of their choice and inspire in them a lifelong commitment to intellectual growth so that they will enrich and serve the communities in which they live.*

PUC serves two high need communities in Los Angeles; Northeast Los Angeles and the Northeast San Fernando Valley. Our organization's ties to these two communities stem from our Founders' deep connections to the communities. Dr. Ref Rodriguez is a life-long resident of Northeast Los Angeles and Dr. Jacqueline Elliot has served the communities of the Northeast San Fernando Valley all her career in public education. We have developed 12 successful, small public charter schools over the course of the past 12 years as a result of overwhelming community requests to create alternatives to the large, low-achieving public schools located in the neighborhoods we serve. We differ from many CMO's in that we focus only on two specific communities, our primary focus is quality rather than quantity and we only seek to open schools when we are convinced there is truly a community desire and need. PUC has 3 commitments as follows: 1) we will increase the college graduation rate by 5 times within the communities we serve; 2) after four years with us our students are proficient; 3) students will commit to uplift their communities now and forever. This is the first time we are applying for Public School Choice and are doing so in great part due to the fact that we still find ourselves with extensive waiting lists for our existing schools. Valley Region High School #5 and Central Region High School #13 are located in the hearts of the communities that we serve and once again, the community is beseeching us to apply for at least one small learning community in each of the two new facilities. We see the benefits of this opportunity as two-fold: we will be able to serve more students through the creation and operation of high quality public charter schools and we will have the opportunity to collaborate and share with the other expert educators who will be located within the facilities. The latter of these two benefits is of critical importance because we have long since come to the realization that all of the students belong to all of us in the education arena and if we are to close the achievement gap, it will be achieved through a high level of strategic collaboration between all of us (both charter school and traditional public school personnel). We embrace and are thankful for this opportunity to work with LAUSD and other educators in our quest to provide an excellent education for each and every child in Los Angeles.

The PUC vision for its students is to achieve demonstrable mastery of the state standards, and a disciplined and enthusiastic approach to learning that will enable them to graduate from college, pursue their dreams, and contribute positively to society. In addition to mastery of state standards as demonstrated on standardized tests and work products in student portfolios, our schools define the rigorous intellectual habits of mind, essential skills, knowledge and attributes students will possess upon matriculation that will prepare them to be successful adults in the 21<sup>st</sup> Century. With input from stakeholders - including faculty, PUC home office educators, students, and families - each PUC school defines its own school-wide learning results. The school-wide goals for PUC's existing high school, CALS

Early College High School will form the initial foundational goals for PUC CRHS #13, but will be re-formulated with input from our school's staff and families. These current foundational goals are "the five A's" that have proven to be effective in successfully educating students.

**Authenticity:** Students are able to connect work with their interests and passions and to real world issues or concerns.

**Academic Rigor:** Students engage in challenging course work which enables them to develop new skills and knowledge, achieve depth in research and produce assignments and exhibitions to the best of their ability.

**Active Exploration and Learning:** Students are advocates for their own learning by pursuing out of school activities including internships, service learning, college classes and civic involvement in their communities.

**Adult & Peer Collaboration:** Students are able to work effectively with others (adults and peers), accepting and giving appropriate assistance.

**Assessment & Reflection:** Students are able to exhibit and assess their own work in light of personal, school and real world standards of performance.

Students who enter and graduate from the charter high school operated by PUC at CR HS #13 will be prepared for active citizenship in our 21<sup>st</sup> century society. We believe an educated person of the 21<sup>st</sup> century will be one who has learned to be self-directed and accountable. That person will work cooperatively to develop constructive answers to difficult questions for the good of society, will have an acute awareness of global perspective and responsibility, appreciate the strength of diversity, and be able to look at himself/herself and others in a variety of ways. An educated person in the 21<sup>st</sup> century will have knowledge of literature, mathematics, history, science, technology, and the arts, as well as have mastered the skills and developed the values necessary to become a contributing member of society.

The charter high school will provide every student and in particular those who are placed in at risk situations with a powerful, engaging and accelerated curriculum that will enable them to succeed. Our goals for student success are as follow:

1. The educational program will enable pupils to become self-motivated, confident, and life-long learners.
2. Pupils will master the basic and augmented skills in context, develop concepts and become critical thinkers and problem solvers.
3. Pupils will receive an enriched curriculum in language arts, mathematics, science, social studies, technology, health, physical education, and performing and visual arts.
4. Pupils will develop an attitude of self-respect, respect for others, and an appreciation for the strength of diversity.
5. Pupils will demonstrate cooperative pro-social behavior with a sense of responsibility to their school, home, and community. Students will display this sense of responsibility by being of service to their school and community. For example, students will continue to conduct canned food drives for local shelters and continue their activities with the residents of a local Senior Citizens Home (entertaining them on holidays, etc.)

6. Pupils will be exposed to career and post-secondary opportunities to develop personal and professional life goals.
7. Pupils will begin to establish long-term, post-secondary goals and identify strategies, resources and support to help them achieve these goals.

**b. Student Population.** Describe the student population that your proposed school will serve, including the interests and critical educational needs of the students. Explain your team's experience serving a similar population of students, and how your proposed school will meet the identified needs of these students.

PUC schools have been serving the Northeast Los Angeles area since 2000 when we opened CALS Charter Middle School. Three years later we opened a high school (CALS Early College High School) and then a K-5 elementary school (Milagro Charter Academy) - both of which have been named California Distinguished Schools. In the past four years, prompted by local demand, we opened two more middle schools (Excel Academy Charter and Santa Rosa Charter Academy) in the Northeast Los Angeles community.. If our current schools in the area are an accurate depiction of the proposed school's population, it can be anticipated that 94% of our students will be Latino, 2% African- American, 2% Caucasian, 1% Filipino and 1% Asian. Eighty-nine percent of our students qualify for free or reduced lunch through the Federal Lunch Program. We anticipate that approximately 11% of the students will qualify for special education services.

Since our schools have long waitlists and regularly outperform the local neighborhood schools, we believe our program would be a welcome addition to this region. Furthermore, in a community where the high school dropout rate exceeds 50%, the better than 90% graduation rate and college entry rate at our schools indicates that our Early College Program model could effectively address community needs.

Throughout this application we will provide a detailed description of the students this school proposes to serve including socio-economic demographic data and achievement scores of the public schools currently serving the community. PUC founded charter schools serving the communities of Northeast Los Angeles have been developed in direct response to these communities. Because of our founder's, Dr. Ref Rodriguez' life-long ties to this area, the schools were specifically and organically developed to serve the students in this specific region. Our charter schools are not cookie cutter replications of schools that were founded in another region, another city, or another state. PUC Schools in Northeast L.A. were developed to serve the residents of these communities.

**c. Instructional Program.** Provide an overview of the instructional program of the proposed school, identifying and describing the key instructional strategies and practices that the school will employ to drive student achievement. Briefly explain the research base that demonstrates that the identified strategies will be successful in improving academic achievement for the targeted student population.

We currently serve 330 high school students in this region through our award-winning CALS Early College High School (ECHS) and believe PUC-CRHS#13 can implement a similar program and build upon CALS ECHS's successes. The major components of this Instructional Program are:

- Honors-level program of study for all – no tracking

- Standards-based curriculum that holds all students to high expectations
- Engaging instruction that emphasizes learning through student-centered inquiry
- Connections between academic learning and student interests, cultures, talents
- Academic catch-up program combining basic skills with advanced concepts
- Small classes and differentiated instruction that meet the learning needs of each student
- Immersion for English language learners and inclusion for special education students
- Daily schedule and yearly calendar structured to extend learning
- Early College: Scaffolded exposure to college- level instruction and college courses

Our Early College program is a direct response to current educational research that demonstrates the traditional high school experience and structure has led many at risk students and in particular those of color to never achieve a high school diploma or to graduate but never matriculate at a college or university. Through the Early College program, students take college classes while still under the umbrella of support of the high school. As they experience success, students' confidence soars and they can fully vest themselves in the PUC vision of college graduation. With this program, 86% of PUC students in Northeast LA's first 4 graduating classes graduated within four years, and 100% of them had been accepted to and were enrolled in college at the time of graduation.

The broad categories of our Instructional Strategies are listed below, with detailed explanations and research basis described in the body of the application:

- A Reflective Learning Community
- Data-Driven Instruction
- Student Interventions and Differentiation
- Collaboration w/ Resource Specialist
- Parent Engagement
- Backwards Planning
- Independent Practice linked to Mini-Lessons (EPK)
- Basic Skills Practice
- Maximizing Student Engagement
- Reading, Writing, and Speaking in the Discipline
- Expect Excellence
- Scaffold and Accelerate, Not Remediate

PUC CRHS #13 will also take part in the *The College Ready Promise*. This \$60 million initiative, funded through the Bill and Melinda Gates Foundation, focuses on teacher effectiveness through the implementation of a number of teacher and leader support strategies and a sound evaluation system that includes student achievement results, that will be linked to compensation. The purpose of the initiative is to ensure that our students are taught by highly effective teachers who ensure that they are truly *college ready* when they graduate from our high schools.

**d. School Culture.** Describe the school culture that your team envisions for the proposed school and what, if any social-emotional supports are necessary to create that culture.

The culture and climate of a PUC school is a collaborative community of learners in which educators from the school site and the home office work with students and families in order to ensure that all students learn, graduate, and attend college. Our schools implement specific practices to support and



maintain this culture such as the use of the **Community Circles** from the *Tribes* program, an empowered School Advisory Council (comprised of students, parents, community members, faculty, and administrators) , and in-house counselors at every school site.

Another essential aspect of our school culture that focuses on *academic achievement* and student *motivation to succeed* is our **College Entry** goal. All staff members possess a deep commitment to ensuring that each and every student not only graduates from the high school but also enters college prepared for college success. The school is small enough to allow staff members to work toward this goal by identifying student needs and addressing them through intervention in class, zero periods, seventh periods, lunchtime, extended day, Saturdays, and during the summer.

We promote our vision of college entry by: discussing college goals on a daily basis, displaying college-related artifacts, prominently posting our mission and vision, designing our college center to be the heart of the campus and a favorite “hang out” spot for students, and by teachers sharing details about their own college experiences. We post the names of students in the lobby of the school as they are accepted to college. Parents attend free workshops from the time their child enters high school in order to prepare them for their child’s eventual entry into college. During their high school years, our students visit a number of colleges and universities.

**e. Accountability and Performance Goals.** Briefly discuss how your organization will set and annually update targets for the indicators in the table below. Please share key data from the Performance Management Matrix highlighting the goals of the proposed school.

Our emphasis on collaboration and data driven instruction enables our faculty and administrative team to create a detailed action plan (called the School Success Plan) every summer that responds to student performance data and utilizes best practices of teaching/learning/assessment in order to work together to meet targeted performance goals.

In July, PUC site-based Instructional Leaders meet with the Home Office Instructional Team (HOIT) and faculty in order to review the school’s state testing results. They analyze the data to determine which sub-parts presented a struggle for students. The staff is led through a reflection and data analysis process that leads to new goals being set in alignment with required annual Measureable Objectives and the school’s vision. Teachers meet within departments and revise scope and sequences from the year prior to address the areas where goals were not achieved. This process results in the creation of the School Success Plan. Progress towards achievement of this plan’s goals is analyzed throughout the year through ongoing discussions between teachers and administrators, with a focus on classroom assessment results, student work, benchmark assessment results, classroom observations, progress reports, semester grades, and finals. Technology such as Zoom Data (Data Director) and PowerSchool enables efficient uploading, analyzing and sharing of data. Teachers are supported in order to address students’ learning gaps through the creation of intervention classes and professional development targeting classroom differentiation strategies. Throughout the school year, monthly data reports are generated to identify each school’s progress in achieving the School Success Plan. Dashboards (see Appendix IV of the Supplementary Application) provide detailed assessment data and can be readily shared with the organization and the Board. When there are discrepancies between where the school wishes its students to be and where the students are, HOIT works with the Instructional Leader to implement interventions in the form of professional development, curricular changes, teacher coaching, resource specialist support and student-specific plans of action. Interventions can also be more encompassing as, for example, when a program was identified to specifically target high school English

teaching to EL and when a program was identified to support teachers in filling student gaps in Algebra I. Depending on the specific gap identified, the organization will formulate a plan *the same month* the issue is identified and will be held accountable through monthly reports to the Board of Trustees.

*Performance Management Matrix to be completed for next round of application.*

- f. Community Analysis and Context.** Describe the community that your proposed school will serve. Include an analysis of the strengths, assets, values and critical needs of the community. Discuss your rationale for selecting this community, your experience serving this or a similar community, how your team has engaged the community thus far and how it will continue to do so if selected.

Our rationale for selecting this community is entirely based on our experiences serving students and families in this region and our desire to respond to the many students on our wait lists who have asked us to expand opportunities for them to attend our small schools. The Northeast area of metropolitan Los Angeles is comprised of 24 square miles with a resident population of approximately 241,400. Latinos make up 67% of the total population (Los Angeles Department of City Planning, n.d.). The 2000 census reported that of the total population over 24 years of age, 44.6% had an education attainment level of less than a high school diploma, 17.2% earned a high school diploma, 11.7% a college degree and 5.2% a graduate or professional degree. In 2000, the median income of the residents was approximately \$33,717 with 27.7% of residents earning below the poverty level (Los Angeles Department of City Planning, n.d.). According to the City of Los Angeles Department of City Planning, 98% of all households in the area speak a language other than English with 73.4% of all households speaking Spanish (Los Angeles Department of City Planning, n.d.).

We see ourselves as a small piece of the collaborative tapestry which will develop and sustain the community-based charter school. The design team – led by the Regional Director working in collaboration with the CEO - will continue to meet with and work in collaboration with outside community agencies that already work with other charter schools the communities located in Northeast Los Angeles and who believe in the mission and vision of the school. These community organizations include the Los Angeles Boys and Girls Club, The Office of Councilmember Ed Reyes, the Northeast Education Strategy Group, the local parks and recreation centers specifically the State Park at Taylor Yard, One LA, and the Los Angeles River Center.

While this community is in need of schools that can better support students in reaching proficiency at grade level standards and can better support students in preparing for and completing college, we do not view this community with a deficit mentality. On the contrary, an area that has traditionally been pointed to as challenge, is viewed by PUC Schools as an asset. Since parental engagement is considered essential to student success, Latino families' respectful distance from school authorities is often considered to be an obstacle. PUC founders and staff, however, understand the Latino concept of *familia* and have implemented a holistic strategy to harness the energy of *familia*. The strategy (described below) was first implemented in 2004 and has been successful in all PUC schools since that time. In brief, this strategy consists of meaningful communication between parents and teachers, regular meetings of committed parent organizers, and integration of parent priorities into curriculum and school culture. It successfully involves parents in a self-propagating cycle of increasing parental voice, involvement in the education of their children, and the creation of Expected School-Wide Learning Results that become central to the school's identity.

- g. Leadership.** Provide an overview of the proposed school's governance structure and leadership team. Highlight the strengths of the leadership team and the proposed leader. If a leader has not been identified, speak to the key attributes the potential leader should possess.

The PUC Schools leadership team has broad and deep experience in the educational and school reform arenas, specifically within the charter school movement. **Appendix III** of the Supplementary Application provides a graphical representation of the PUC organization and clarifies our governance structure. The PUC organization is headed by a CEO and overseen by a Board of Trustees. Three directors collaborate with the CEO in supporting and overseeing PUC schools. The High School Director (new position to be created) will oversee this proposed school as well as the other PUC high schools. PUC employees at the 'home office' support the schools by providing operations, fundraising, finance and instructional services. The Home Office operational team, for example, ensures that payroll, benefits, compliance, site-related issues, human resources, and other non-teaching/learning related concerns are attended to properly and promptly. The Home Office Instructional Team includes a Chief Academic Officer and others with expertise in specific subject matter, special education, instructional strategies and assessment. At the school site, an Instructional Leader (principal) leads and supports faculty and meets on a weekly basis with the Home Office Instructional Team and all other PUC Instructional Leaders to share best practices and receive support as needed. For the proposed high school, the Instructional Leader will also be supported by an Assistant Principal, who will manage operations-related matters and coordinate this work with the home office team, and a Dean, who will focus on student discipline, counseling and other special needs. In addition, our collaborative and power-sharing model includes parents, teachers, students and community members, encouraging them to vote for representatives to the School Advisory Council.

The Instructional Leader, Assistant Principal and Dean have not been identified but detailed job descriptions are in **Appendix X**.

The following people are the members of the applicant team and will collaborate to interview and identify the school leadership team:

1. Dr. Ref Rodriguez – Co-founder of PUC Schools, founded all schools in NE Los Angeles and gave support to Dr. Jacqueline Elliot for the founding of PUC schools in NE San Fernando Valley
2. Dr. Jacqueline Elliot – Co-founder and CEO of PUC Schools, founded all PUC schools in the NE San Fernando Valley and gave support to Dr. Rodriguez in the founding of the schools in NE Los Angeles
3. Nik Orlando – Regional Director for NE Los Angeles PUC Schools, has worked with PUC for 10 years and supported the founding of all PUC schools in NE Los Angeles
4. Kelly Montes De Oca – Chief Academic Officer of PUC Schools has given academic and professional development support for all PUC schools on an ongoing basis, has worked with PUC for 9 years.
5. Dr. Kaye Ragland, Ed.D. – Serves as Director of Special Education for PUC and is an expert in all aspects of special education, has worked with PUC for 6 years.
6. Mara Simmons, Ph.D. – Instructional Leader of CALS Early College High School has been responsible for leading the instructional program at CALS Early College High School for the past four years. She was founding principal of Animo Leadership, the first school in the Green Dot Public Schools network.

7. Veronica DeLeon – A founding student of CALS Charter Middle School and CALS Early College High School and 2010 graduate of Occidental College.

## Instructional Program

### 2. Curriculum and Instruction (15 pages + attachments)

a. **Instructional Philosophy:** *Provide a thorough description of the proposed Instructional Program and the underlying theory that drives it. How does the proposed Instructional Program align with the critical educational needs of the population of students you propose to serve? Include an explanation of what students should know and be able to do as well as the rigorous intellectual habits of mind, essential skills, knowledge and attributes they will possess upon matriculation that will prepare them to be successful adults in the 21<sup>st</sup> Century.*

Our instructional program was designed in order to address the needs of the student population residing in the Northeast Los Angeles area. We currently serve 330 high school students in this region through our California Academy for Liberal Studies Early College High School (CALS ECHS). Since CALS ECHS was named a California Distinguished School in 2009 – an honor awarded to nine high schools in LAUSD - we believe this proposed school can implement a similar program and build upon CALS ECHS's successes. The major components of this program are:

- Honors-level program of study for all – no tracking
- Standards-based curriculum that holds all students to high expectations
- Engaging instruction that emphasizes learning through student-centered inquiry
- Academic catch-up program combining basic skills with advanced concepts
- Small classes and differentiated instruction that meet the learning needs of each student
- Immersion for English language learners and inclusion for special education students
- Daily schedule and yearly calendar structured to extend learning
- Scaffolded exposure to college- level instruction and college courses

Current educational research demonstrates that the traditional high school experience and structure has led many at risk students and in particular those of color to never achieve a high school diploma or to graduate but never matriculate at a college or university. We believe a change in structure that enrolls high school students in college courses and supports them in their studies facilitates a smooth transition into post secondary institutions, and our Early College high schools have attested to this theory. Of our first 4 graduating classes at CALS ECHS, for example, 86% of the students graduated within four years, and 100% of them had been accepted to and were enrolled in college at the time of graduation. 100% of the graduating students had taken at least one college class by the time they reached graduation and several had completed in excess of 20 transferable college units. The graduation and college entry rate at CALS ECHS contrasts dramatically with the 50% dropout rate at the neighboring high schools: Franklin, Belmont and Lincoln High Schools.

Our Early College program is offered through a partnership with Los Angeles Trade Technical College. We draw upon research from the Middle College National Consortium, which has been active for over 30 years, and are modeled on successful programs serving NYC students of similar demographics at Bard College, Simon Rock College, and La Guardia Community College. As an early college high school, our students take college courses simultaneously with their high school coursework. All students take at least one college course before graduating from the high school but many take in excess of 20 transferable college units and some take as many as 50 or more. The goal of the early college program is that if students take a college class while still under the umbrella of support of the high school and experience success, their confidence will soar and they will fully vest themselves in the PUC vision of college graduation. In addition, our students are able to save money once they enter college after high school graduation in that they have already completed many units.



As part of Partnerships to Uplift Communities (PUC Schools), this proposed school will also take part in the *The College Ready Promise* with all schools in the consortium made up of Green Dot Public Schools, Aspire Public Schools, Inner City Educational Foundation, and the Alliance for College Ready Public Schools. This \$60 million dollar initiative, funded through the Bill and Melinda Gates Foundation, focuses on teacher effectiveness through the implementation of a number of teacher and leader support strategies and a sound evaluation system that includes student achievement results, that will be linked to compensation. The proposed school will also be included in this funding stream. The purpose of the initiative is to ensure that our students are taught by highly effective teachers who ensure that they are truly *college ready* when they graduate from our high schools.

Additional components of our program are based on research indicating that students in this particular area of Los Angeles (from disadvantaged and traditionally low-achieving backgrounds, whose parents have not attended or graduated from college) benefit from high expectations, rigorous curriculum, clearly articulated learning goals, extended learning time, and family involvement in the school. We are committed to ensuring that each of our students will achieve high levels of performance as articulated in the State content standards; our academic program does not dumb down our expectations of all students. Instead, we commit to encourage and support students as they partake in rigorous and challenging academic coursework. In fact, our high schools are among a handful of Los Angeles area high schools to build an entire program around the vision that all students, not just the gifted or highly motivated, will meet the State requirements for a high school diploma while at the same time completing the A-G requirements for entry into the CSU or UC system while also earning college level coursework credit.

Research and a partnership with the National Council of La Raza, an organization serving our student population and their families, further honed our program. The Bill and Melinda Gates Foundation's Early College High School Initiative supported our school designers in identifying five theoretical tenets that form the basis of the educational and organizational framework of our high school. In order to bring these theories to life, we implement a continuous and consistent professional development program for the whole school (teachers, administrators, staff, parents and community members), as advocated by educational researchers Peter Senge, Michael Fullan, Linda Darling-Hammond and Richard DuFour. The theories that inform our learning community include:

- **Individualization.** Students proceed through their schooling at different rates, they have different learning styles and bring different needs and issues to the classroom. We will combat these problems by limiting our school population to 450 students, reducing class size to 18-25 students, and implementing an Individual Learning Pathway that is developed by the student, his/her family and a faculty advisor and is modified and refined at various points throughout the student's high school experience. Furthermore, our advisory system assigns students to groups that meet regularly to discuss educational plans, curriculum issues and problems that occur as part of a growing, developing institution.
- **Small School.** There is a body of research regarding the value of small schools. Research indicates that smaller high schools have a greater chance of creating a learning climate based on the values of respect and responsibility, are safer, are conducive to student-teacher mentor relationships, and foster a community of teachers that leads to collaboration and better practice.
- **Connection with the World of Work.** Our program connects the subjects of formal schooling with the real world by engaging students in significant work on projects that simulates and applies to real

life work situations. Students use a variety of tools, methods and technologies to produce projects and work products that connect baseline disciplines with real work applications. Our schools also commit to inviting guest lecturers and practicing professionals who demonstrate their work in a variety of seminars and demonstration labs, enhancing the curricular offerings.

- **Connection with each Student's Culture, Interests, Talents.** Multiple elements of our program bridge the core curriculum to our students' personal lives. School-wide celebrations and assemblies related to our students' cultures, extra-curricular pursuits and backgrounds occur throughout the year. Our emphasis on student-directed projects and presentations give students opportunities in each course to choose their own driving questions and deepen their own knowledge in fields of knowledge related to their culture, background, and identity. We believe that when students can specify areas of exploration for themselves, they are engaged and effectively strengthen their research, writing, and presentation skills, while bringing the community closer as all grow to understand each other better. Our arts-integration emphasis is yet another way to engage students through visual and performing arts – interests and talents they already possess – enhancing their academic skills and contributing to their skills and knowledge in the artistic realms.
- **Performance Based Assessment.** While student will be accountable for demonstrating understanding on State-mandated, standards-based tests, they will also be assessed on the basis of producing products, solving problems and making written and oral presentations. These work products and projects will be aligned to the State content standards and will assume mastery of baseline disciplines that make understanding problems and developing solutions possible. Every graduate will compile a performance portfolio that summarizes and presents samples of achievements, projects completed, competencies gained, examinations passed and credit earned.
- **Accelerated Learning.** Our Early College structure – described above - allows students to accelerate their learning and reduce the time needed to secure both a high school diploma and the first two years of college. Accelerated learning can be encouraged with strategies such as the following:
  - Concurrent or Dual Enrollment of high school students in a postsecondary institution has been used for many years and if planned properly can compress the time required to complete a diploma/degree program.
  - Making Better Use of the Traditional Twelfth Grade Year can also accelerate student progress. For many students the twelfth grade has become a year of taking optional or elective courses that do not complement the required curriculum nor advance a student to a successful college experience. Making optimal use of this full academic year can accelerate learning.
  - Ed Net or Online/Internet Courses continue to make significant progress in providing challenging educational experiences. As appropriate students may take advantage of literally hundreds of courses from accredited institutions that will fulfill requirements and or augment a student's education independent of the availability and scheduling of traditional classes.

These examples of accelerated learning methods are not intended to be a comprehensive list of approaches that can be taken. Moreover, it should be emphasized that the point of such methods is not to complete programs more quickly but to free students from schedules, class time and often duplicative requirements. Our program eases the transition from high school to college and promotes the idea that students can assume challenging academic work and that all students should be advanced based on their intent, ability and demonstrated competence. Accelerated learning strategies will be valuable to the extent that they overcome existing impediments to a smooth high school to college transition and result in a broader, in-depth understanding of core subjects.

In addition to mastery of state standards as demonstrated on standardized tests and work products in student portfolios, our schools define the rigorous intellectual habits of mind, essential skills, knowledge and attributes students will possess upon matriculation that will prepare them to be successful adults in the 21<sup>st</sup> Century. With input from stakeholders - including faculty, PUC home office educators, students, and families - each PUC school defines its own school-wide learning results. The school-wide goals for CALS ECHS will form the initial goals but will be examined and re-formulated, with input from our school's staff and families. These current goals are "the five A's":

**Authenticity:** Students are able to connect work with their interests and passions and to real world issues or concerns.

**Academic Rigor:** Students engage in challenging course work which enables them to develop new skills and knowledge, achieve depth in research and produce assignments and exhibitions to the best of their ability.

**Active Exploration and Learning:** Students are advocates for their own learning by pursuing out of school activities including internships, service learning, college classes and civic involvement in their communities.

**Adult & Peer Collaboration:** Students are able to work effectively with others (adults and peers), accepting and giving appropriate assistance.

**Assessment & Reflection:** Students are able to exhibit and assess their own work in light of personal, school and real world standards of performance.

**b. Core Academic Curriculum:** *Describe the core academic curriculum that your proposed school will use. Provide evidence that the proposed curriculum is research-based, culturally relevant, connects with the lives of, has been effective for and meets the diverse learning needs of the student population you plan to serve and addresses the California State Standards. For high schools only, explain how your proposed school will meet A-G requirements. Additionally, outline the plan for Western Association of Schools and Colleges (WASC) accreditation.*

- i. **Autonomy:** *Describe how you will use curriculum and instruction autonomy to maximize student learning.*
- ii. **Curriculum Development:** *If applicable, submit a timeline that outlines plans to develop curricula for the proposed school prior to school opening. N/A*

The core curriculum for the proposed school is based on the specific standards in core content areas aligned with A-G college-prep coursework that guide our expectations for what students will know and be able to do in each curricular area. The courses offered at our high schools, and those required for graduation, are based upon best practices in education, feedback from parents and employers in the community, and feedback from students. As we already have graduated several classes of students and enrolled them successfully in college, we can point to our ability to effectively design and implement courses that receive approval by UCOP, a College Board number, and meet A-G requirements.

The "A-G" courses are History/Social Science, English, Mathematics, Laboratory Science, Foreign Language, Visual and Performing Arts and College Preparatory Electives. Additional courses include Physical Education, Leadership, and Humanities. In 9<sup>th</sup> grade students begin with Humanities. This

course provides an emphasis on literacy skills to help students adjust to high school level work. Our Instructional Leader will be supported by our experienced Regional Director in submitting course descriptions for UCOP approval and ensuring our students will have experienced all courses required for UC admission.

Since over 90% of parents currently served by PUC in the community did not attend college, we are conscientious in our efforts to share information with them and our students about our curriculum, A-G requirements, and the transferability of our courses. Our school will provide a course catalog/description that includes explicit notification about the transferability of courses “A-G”, other public high school courses, and the eligibility of courses to meet college entrance requirements. Parents will also receive this notification in all student recruitment and student enrollment materials. We will meet with parents annually to review students individualized college plans and assure that students are enrolled in the necessary classes to graduate eligible for college admission. Our experience in our existing high schools has been that our parents become so immersed in the college preparatory program for their children, that many of them actually become inspired to also begin taking college coursework themselves.

We respect the *autonomy* of our teachers as professionals and consider them adept at tailoring curriculum to the diverse learning styles of their specific students. We support teachers in adapting resources to effectively personalize the learning experiences for their students. By having this kind of autonomy to construct their course using materials that are deliberately chosen, teachers tend to incorporate higher level text-based content to teach their courses because they pull articles and chapters from several different resources including a lot of college texts.

Since CALS ECHS is engaging students of the same demographic as this proposed school, we will not be reinventing the wheel and expecting our teachers to design their courses prior to school opening. Instead, we will utilize the same curricular resources in the first years of school opening as those in use at CALS ECHS. In addition, our teachers at CALS ECHS will share their detailed scope and sequences and lesson plans with teachers at this proposed school. These resources will provide a solid foundation upon which our new teachers can exercise their own *autonomy* and adapt curricula and instructional methods to student interests, questions, and cultures, thus providing students with learning experiences that are engaging and relevant.

**The curricular resources are listed in Appendix IX.**

**WASC Accreditation.** All of our schools have received WASC accreditation and our Home Office is well equipped to facilitate a smooth process that will begin in the FIRST year of the school’s operation. We intend to begin the process as early as possible in order to ensure that WASC accreditation is acquired prior to our first graduation. The lead person on this process is Regional Director, Nik Orlando, and our plan is in **APPENDIX III**.

**c. Addressing the Needs of All Students:** *Articulate how the proposed Instructional Program will reinforce a commitment to different methods of instruction to meet the needs of all students, including students of poverty, students with special needs, students with disabilities, gifted students English Learner (EL) students and Standard English Learner (SEL) students, young children ages 0-5 (elementary schools only.)*

While our instructional program coupled with a data driven instruction emphasis and a full range of academic support services, will be designed to allow all students to pursue their learning in an in-depth

way, additional efforts will be made for students identified as in need of particular support, such as students with disabilities, ELL, SEL, students of poverty, and gifted students.

**EL students:** Our high schools meet all requirements of Federal Law relative to equal access to curriculum for English learners. The instructional program will be presented in English with provisions to ensure comprehension for English language learners and development of English as a second language. The instructional program is designed to promote language acquisition, oral language development and enriched learning opportunities for all students in the following manner:

- Students interact through cooperative learning activities in all content areas.
- Students make oral presentations in all content areas.
- Students collaborate for group performances and reports.
- English language learners are mainstreamed.
- ALL teachers utilize SDAIE techniques to deliver and scaffold instruction.

Curriculum will be presented to English learners at beginning ELD levels in English utilizing Specially Designed Academic Instruction in English (SDAIE) techniques. Native language support will be provided as needed in all content areas by bilingual staff and volunteers in order to ensure comprehension of instructional input. Students will be provided ESL instruction during the instructional day and will also be offered additional ELL learning opportunities and ELL tutoring instruction during the extended day program. Students at beginning ELD levels will be mainstreamed with fluent English speaking students and fluent bilingual students in order to support English language development and comprehension of instructional input.

In the event a student enters our school without records and/or prior assessment, a Home Language Survey will be completed. If a language other than English is indicated on the survey, the Language Assessment Scale will be used to determine English proficiency.

The criteria used to determine full academic fluency will be the CELDT. In our experience with this student population at CALS ECHS, most students have already proven proficiency in their middle schools. For students who have not yet been reclassified, we follow the PUC Schools reclassification procedure articulated in the matrix below.

#### ENGLISH LEARNER RECLASSIFICATION MATRIX

Student's Name: \_\_\_\_\_ School ID# \_\_\_\_\_ SSID# \_\_\_\_\_ Grade: \_\_\_\_\_

##### **1. Assessment of English Language Proficiency (CELDT Test Results)**

Test Date: \_\_\_\_\_ Overall Proficiency Level: \_\_\_\_\_

Listening \_\_\_\_\_ Speaking \_\_\_\_\_ Reading \_\_\_\_\_ Writing \_\_\_\_\_

*Consider for reclassification students whose overall proficiency level is early advanced or higher and:*

☐ *Listening, Speaking, Reading, and Writing is intermediate or higher,*

*Those students whose overall proficiency level is in the upper end of the intermediate level also may be considered for reclassification if additional measures determine the likelihood that a student is proficient in English.*

##### **2. Performance in Basic Skills ~ CST Performance level must score BASIC or above**

Test Date	California Standards Test (CST) – Eng. Lang. Arts
May	



### 3. Teacher Evaluation

<b>ELA Grades</b> <b>C or above</b> <b>Required</b>		<b>Reading Achievement</b> <i>Student meets the fall or spring median.</i> <b>MEDIAN=</b>	<b>Language Usage Achievement</b> <i>Student meets the fall or spring median.</i> <b>MEDIAN=</b>	<b>Additional Assessment Name:</b>  <b>Date:</b> <b>Signature:</b>
<b>Semester 2</b> <b>2007-08</b> Eng 10B=	<b>Semester 1</b> <b>2008-09</b> Eng 11A=			

*If student meets one or more of the three criteria then recommendation for reclassification can continue to the next step.*

*If student does not meet all of the above three criteria for reclassification then they do not reclassify*

Reclassification Recommended (Circle One)      YES      NO

Principal's Signature \_\_\_\_\_ Date \_\_\_\_\_

### ~~4. Parent Opinion and Consultation~~

After reviewing the above information, we would like to inform you that your child,  
 \_\_\_\_\_ has been recommended for reclassification as Fluent-English Proficient.

\_\_\_\_\_ *has not been recommended for reclassification as Fluent-English Proficient.*

PARENTS PLEASE MARK ONE AND SIGN BELOW

\_\_\_\_\_ I agree with the information as indicated above.

\_\_\_\_\_ I do not agree with the information as indicated above. I would like to schedule a conference with the school designee to discuss this information.

\_\_\_\_\_ Parent's Signature/Date

**Gifted Students.** The entire school community is committed to designing learning experiences that differentiate for different populations of students including gifted or talented students. We agree with Kathy Checkley when she states teachers must use assignments that "allow different levels of complexity in students' responses" to better serve all learners including gifted students. Differentiation does not imply that teachers must use a different curriculum, but that the complexity and depth of assignments differ to meet the student's need in increasing their knowledge base. Instead of assigning busy and extended work, lessons are crafted to challenge the students to think more critically and engage in the content in depth.

PUC Schools is a member of the California Association for the Gifted (CAG). PUC teachers keep up to date with the research and methods of teaching that best serve the diverse community of gifted students. The following are examples of differentiation strategies our teachers will use to accelerate curriculum for students. Differentiation strategies modify what students will know (content), how students will think (process), and how students will summarize and share their learning (products). One example is using different dimensions of depth and complexity in all lesson plans. Differentiation will also be facilitated through flexible groupings and regrouping of students for different tasks. The groupings will also be based on need, interest, and ability. Students will have the opportunity to experience the content by going on expeditions that allow them to see how scholars use the content they learn in class in a real-life context. In addition, teachers will offer differentiated independent research projects as a strategy to challenge these students to increase their learning. Teachers will use advanced learning opportunities that allows students to participate in out-of grade-level activities using

and selecting resources beyond grade level when appropriate. The teachers will also adjust the time needed to learn, noting that some students learn more quickly than others.

As an early college model, the road is paved for students who are excelling academically. Students, as they are ready and demonstrate desire, are able to enroll in college level courses to further challenge themselves while earning dual and or college credit.

**Special Needs.** Special needs students will be integrated into the mainstream classroom to the extent possible. Special needs can vary widely, and may range from classroom modifications, interventions, special instructional strategies and special programs. Each special needs student will be given support for his or her unique learning style. Special needs students will receive daily support and individual instruction on a case-by-case basis. If teachers and/or parents determine that a student may need additional support or resources, then an IEP (individual education program) or declaration of intent process will begin. The general program of instruction for students with disabilities will be responsive to required courses and related curricular activities provided for all students in the school. We will conduct assessment and standardized testing of students with disabilities using state and district guidelines. Meetings will be arranged with parents to monitor progress and concerns. IEPs will be designed and revised as data from testing and assessments are gathered. The schools will adhere to all provisions of the Individuals with Disabilities Education Act (IDEA) and its amendments, Section 504 of the Rehabilitation Act, AB 602, ADA, the modified consent decree and the Chandra Smith Consent Decree.

**Academically Low Achieving (At-Risk) Students.** The Accelerated Schools Model contends that “at risk” students are those who are unlikely to succeed in schools as schools are currently constituted. These students are deemed at risk because they bring a different set of skills, resources and experiences than those on which school success is traditionally based. “At risk” students are caught in a mismatch between the experiences they have at home, with family or community on the one side, and what schools traditionally expect for their success on the other. Once educators cease to view the child as “at risk” and instead view the situation the child is placed in as at risk, we can then change the situation. (VPPCHS, 2003).

PUC Schools provide every student, and in particular those who are placed in at risk situations, with a powerful, engaging and accelerated curriculum that will enable them to succeed. Our goals for student success are as follows:

- The educational program enables pupils to become self-motivated, confident, and life-long learners.
- Pupils master the basic and augmented skills in context, develop concepts and become critical thinkers and problem solvers.
- Pupils receive an enriched curriculum in language arts, mathematics, science, social studies, technology, health, physical education, and performing and visual arts.
- Pupils develop an attitude of self-respect, respect for others, and an appreciation for the strength of diversity.
- Pupils demonstrate cooperative pro-social behavior with a sense of responsibility to their school, home, and community. Students will display this sense of responsibility by being of service to their school and community. For example, students will continue to conduct canned food drives for local shelters and continue their activities with the residents of a local Senior Citizens Home (entertaining them on holidays, etc.)

- Pupils are exposed to career and post-secondary opportunities to develop personal and professional life goals.
- Pupils establish long-term, post-secondary goals and identify strategies, resources and support to help them achieve these goals.

We also implement an extensive preventative intervention program that works to identify students who are likely to struggle before they fail as modeled by Alan Blankstein's Six Principles that Guide Student Achievement in "Failure is Not an Option" (2004). This approach has been newly implemented after an internal data review process that involved feedback from students, parents and teachers. Within this intervention program students are identified before they fail, supported through in-class intervention practices and after school tutoring to lead to the eventual success with achieving the standards expected of the course. This approach provides the safety net particularly for our ELLs, special needs and low SES students in addition to any student showing signs of struggle.

**Students of Poverty.** While systematic research has not found a direct correlation between socioeconomic status and school achievement in a way that can lead to a pedagogical generalization, our experience serving students from a high poverty background has led us to conclude that certain practices are more effective than others. Our college ready focus, for example, is a positive source of inspiration and motivation. Our whole day program, including before- and after-care, accommodates working families and supports students in learning in and out of school. Furthermore, our practice of utilizing projects and products has been corroborated by research studies on socioeconomically disadvantaged children that have indicated that the use of projects and work products: (1) increases their motivation for learning academic skills and the opportunity to meaningfully practice these skills, (2) helps children see themselves "as learners and problem solvers" and develops their self-esteem, (3) strengthens positive relationships between teachers and families, and (4) helps families become aware of resources available in their communities (Helm and Lang, 2003).

**d. Instructional Strategies.** *Describe the instructional strategies that will be implemented at your proposed school to support the Instructional Program. Explain why these strategies are well suited to address the needs of the student population you plan to serve.*

Teachers employ a variety of instructional strategies to help students meet the high expectations. Instruction is guided by a process called the Learning Cycle. This cycle was developed from research on cognitive science applied to how students learn. All learning begins with the accessing of prior knowledge (APK), continues with extension of prior knowledge (EPK), follows with an application of the new knowledge (Application), and concludes with a reflection on learning (Reflection). This process was developed to ensure that students are ready for learning, that they have sufficient opportunities to practice new skills, that they have a meaningful application task, and that their retention is improved by the opportunity to reflect. These practices are implemented across all PUC schools, and teachers are held accountable to these practices through an extensive Performance Management System.

In addition to benefiting from the learning cycle, students learn best when they are engaged. Curricular choices (described above) are intended to maximize student engagement.

Furthermore, we believe that generalizations about learning, even when applied to identifiable 'special populations', are only part of the picture in ensuring effective teaching. Our teachers, with support from their Instructional Leaders and the Home Office Instructional Team, utilize data and observation in order

to respond to their *individual students' needs*. Through these efforts they can adjust pacing of lessons as needed, maximize classroom time, balance procedural and conceptual learning, and involve all students equally in learning.

The broad categories of our Instructional Strategies are listed below:

*A Reflective Learning Community:* Our teachers have focused time to share best practices and reflect on their lessons, student work, and the improvement of student learning. These meetings are consistent and structured. Teachers conduct *peer observations* to use actual practice in the classroom as a data tool for reflection towards improvement. Coaching cycles will be driven by inquiry and strategically facilitated to improve teacher practice.

*Data-driven Decision Making:* The school will have grade level and school wide action plans based on data from PUC assessments, grades, and other pertinent sources. Teachers will use this data to reflect and modify instruction consistently. Decisions will be driven by the Cycle of Instructional Improvement.

*Data-Driven Instruction:* The charter schools with the most impressive results in elevating student achievement use assessment to diagnose student needs and the effectiveness of their teaching strategies to meet those needs. *The teacher analysis of the assessment allows for a pattern of continuous reflection and improvement; a key element contributing to the success of the schools that have a similar population as CALS ECHS.*<sup>1</sup> By establishing consistent school-wide assessments and administering them on a consistent basis, teachers can always determine which performance standards students have mastered and which are still to be addressed.

*Student Interventions and Differentiation* : The school will have structured and immediate interventions for at-risk students both within and beyond the classroom. These interventions will be implemented consistently and focused on bridging knowledge gaps and providing multiple paths for learners to gain conceptual knowledge and skills.

*Collaboration w/ Resource Specialist (Part of Student Interventions and Differentiation):* Teachers will work directly with the Resource Specialist to design instruction that directly incorporates the IEP goals for all RSP students in their classroom. Staff members will co-teach with the Resource Specialist and receive feedback on their instruction in relation to their RSP students.

*Parent Engagement:* Parents are to be engaged in their students' learning as the "primary educators"; they will be given specific-doable strategies that will enable them to support their children. They will be informed when assessments or big projects are given and the results will be shared with them. Furthermore, they will be encouraged to share their questions and interests, lead in the implementation of cultural celebrations and festivals at the school, and join in the celebration of their children's presentations and curricular as well as extra-curricular achievements.

Each parent is encouraged to spend one day per year shadowing their child during academic classes. They are welcome to observe classes any day, at any time they deem necessary, and to give feedback on instructional programs. Also, they are invited to attend breakfast forums in which they discuss their

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<sup>1</sup> Innovation in Education: Successful Charter Schools. U.S. Department of Education Contract No. ED-01-C0-0012, Task Order D010, with West Ed. Rod Paige, Nina S Rees, Michael J. Petrilli and John Fiegel. [http://www.uscharterschools.org/pub/uscs\\_docs/scs/full\\_print.htm](http://www.uscharterschools.org/pub/uscs_docs/scs/full_print.htm)

collective observations of classroom visits. In addition, parents participate in Family Meetings throughout the year where they discuss school and home strategies to improve academic achievement of their students.

*Backwards Planning:* Unit designs reflect all three stages in the backward planning process. Units are inclusive of all relevant concepts and each unit (or lesson) links sequentially to the next. The skills and/or concepts within each unit (or lesson) are broken into multiple steps or pieces (scaffolded) so there are connections to bigger concepts. The units are guided by enduring understandings and essential questions.

*Independent Practice linked to Mini-Lessons (EPK):* Independent student work will reflect the concepts and skills addressed through direct instruction or mini-lectures. Students will be given time to practice in class so the teacher can ensure students are not practicing “wrong” or reinforcing misconceptions. Sufficient varied practice will be incorporated into instruction to reach successful application. This is aligned to the essential elements of common strategies.

*Cumulative Assessments Aligned to Lesson Activities (Application):* Teachers will develop assessments (in a variety of formats) that include exercises practiced in class from the onset. These assessments will be cumulative and reflective of state standards and aligned to essential elements of common strategies. The Cycle of Instructional Improvement will be evident in the use of these assessments.

*Relevant and Cumulative Do-Now and Homework (Can be part of the Learning Cycle):* The do-now exercises and homework connect to the lesson and are presented in a variety of formats, including multiple choice, short answer, and open response. The do-now exercises and homework is cumulative. The work is aligned to the essential elements of the common practices.

*Basic Skills Practice:* Students will practice the basic skills necessary to succeed in the discipline daily. The work is aligned to the essential elements of the common strategies.

*Maximizing Student Engagement:* Teachers will adjust the pacing of the lessons as needed to ensure the engagement of students in learning activities. Teachers will incorporate wherever possible connections between the standards and the individual and cultural lives of the students. The sharing of best practices across PUC schools will allow our new teachers to build on these successful engagement techniques currently in use at schools serving the same population of students. Lessons balance developing procedural, factual, and conceptual understanding. Lessons address the “why” behind the learning. Teachers use effective questioning to deepen classroom conversations and to probe students’ thinking. A variety of dialog structures (pair/share, whole group, small group, etc.) is integrated into the lessons. Collaborative group work is included strategically.

*Reading, Writing, and Speaking in the Discipline:* The use of formal vocabulary is used throughout the lessons by both teacher and students. There is active use of the word wall to support vocabulary and concept development. Students are engaged in deep, academic conversations. “Accountable talk” is being utilized by both the teacher and students. The students and teachers are using reading and writing as tools to help students access and assess learning of skills and concepts. The students’ access to rigorous texts is scaffolded purposefully by the teacher. Strategies to access text are explicitly taught by the teachers and used independently by students.



*Expect Excellence:* We aim to emulate the very strongest schools in expecting its students to work for and achieve the most rigorous academic standards. The school is founded on the belief that students rise to meet the high bar that is set for them. We hire teachers and staff who share that belief and work ceaselessly to encourage its students and their parents to own that belief as well. Deep down, students want to be pushed by adults because they see it as a sign of caring. This was most recently articulated by inner-city adolescents in interviews with education researchers Dick Corbett and Bruce Wilson. Students said that the best teachers, the ones they preferred, were not those who let them off the hook, but those who nagged and pressed for the very best, who tolerated no excuses.<sup>2</sup>

*Scaffold and Accelerate, Not Remediate:* A school that sets a higher bar has an even greater responsibility to work toward moving all students over that bar. One accomplishes this not by lowering the standard, but by giving students every possible chance to learn. Rather than placing students into lower or higher tracks we will provide students with the same rigorous content and scaffold the support. The students who need more support will receive the necessary assistance to ensure that every student is performing at grade level.

*In addition,* we have a partnership in place with CSU Northridge to train our English teachers in specific strategies to support students to pass the college entry-level English tests. Within this training, teachers learn new ways to teach writing and develop units that incorporate a significant amount of non-fiction text.

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<sup>2</sup> Corbett and Wilson. *Listening to Urban Students: School Reform and the Teachers They Want* (State University of New York Press, 2001).

### 3. School Culture and Climate (4 pages + attachments if applicable)

**a. Description of School Culture:** *Describe the culture and climate envisioned for the proposed school, particularly as it relates to academic achievement, student motivation to succeed, personalization and safety. Identify specific rituals, routines, activities, structures, etc. that will support the achievement of the culture and climate envisioned. Discuss how you plan to introduce and implement the rituals, routines, activities and structures with students, teachers, parents and other staff.*

The culture and climate of a PUC school is a collaborative community of learners in which educators from the school site and the home office work with students and families in order to ensure that all students learn, graduate, and attend college. The rituals, routines, activities and structures that have been successful in building and maintaining such a nurturing and achievement-oriented culture at other local PUC schools will be implemented, as they have demonstrated effectiveness.

The use of the **Community Circles** from the *Tribes* program supports PUC schools in creating and sustaining an environment that provides a sense of belonging, support, connection to others and to ideas and values that make young lives meaningful. The Community Circle has demonstrated a positive impact on *achievement, motivation, personalization and safety* in our schools and in research studies across the country. Community Circles are introduced at the onset of school with students and during Teacher Induction over the summer.

The Community Circle creates mini-communities that use a series of collaborative skills and help each other honor four positive agreements (norms): attentive listening, appreciation/ no put-downs, the right to participate or to pass, and mutual respect. These norms assure appreciation and respect for each other. A sense of community becomes a reality as people work together on meaningful goals, tasks and challenges. No one fears to talk, all respect each other and themselves. It is safe enough to ask questions – safe enough to learn. Another benefit of this practice: when students meet in a community circle in the morning, teachers can identify students who have arrived at school not feeling well, either physically or psychologically, and address their needs immediately.

A **professional community of learners** is also inherent to our school structures as we have found that collaboration and sharing of best practices and expertise across schools, faculty, leaders and educational experts results in increased *academic achievement* and *personalization* of the school experience for our students. Leaders from our schools meet weekly and receive support from the Home Office's Instructional Team as they design site-specific professional development for their teachers. This community of learners permeates the school culture and models collaboration for faculty and students.

Another essential aspect of our school culture that focuses on *academic achievement* and student *motivation to succeed* is our **College Entry** goal. All staff members possess a deep commitment to ensuring that each and every student not only graduates from the high school but also enters college prepared for college success. The school is small enough to allow staff members to work toward this goal by identifying student needs and addressing them through intervention in class, zero periods, seventh periods, lunchtime, extended day, Saturdays, and during the summer.

We promote our vision of college entry by: discussing college goals on a daily basis, displaying college-related artifacts, prominently posting our mission and vision, designing our college center to be the heart of the campus and a favorite "hang out" spot for students, and by teachers sharing details about their own college experiences. We post the names of students in the lobby of the school as they are accepted to college. Parents attend free workshops from the time their child enters high school in order

to prepare them for their child's eventual entry into college. During their high school years, our students visit a number of colleges and universities.

In a community where the high school dropout rate exceeds 50%, the better than 90% graduation rate and college entry rate at our schools can no doubt be attributed to the college going culture and **Early College Program** that is described in greater detail below.

Another structure that has been successful in supporting our *student achievement* relates to our **Attendance Policies** which result in 96%+ attendance rates. Policies in **Appendix V**, Student Handbook.

**b. Student Support and Success:** *Describe exactly what student success means at your proposed school. How will your school motivate kids to come to school and stay in school?*

At our PUC high schools, we consider our students 'successful' if they are embracing and moving toward the goal of graduating high school, prepared for successful completion of college. A number of practices and support structures exist to motivate our students to come to school and stay in school. We believe these practices can be considered effective, judging by our 96%+ attendance rates and the plurality of students we see on campus every day at 6 PM, reluctant to leave our school.

We have a culture of success in which students are nurtured, their needs are met and their relationships with each other and with staff are supported. Teachers are expected to promote strong, respectful, caring relationships with students, constantly reminding them that their success is our *raison d'etre* and that they must express their needs and challenges so we can work together.

We have a team of counselors for students and their families (**Section 3. School Culture, c.**). We also provide outside referrals to vetted organizations that can provide additional support services. School structures such as our small size, collaborative culture, Advisory system, and ongoing **Community Circles** (described in **3. School Culture, a.**) in which students can safely open up about their thoughts and challenges, enables our staff to identify students and families and bring them into the care of the appropriate service provider in a timely fashion.

Furthermore, we have designed an engaging, extended day program (sports, art, enrichment, clubs, interest-based activities) that motivates students and results in their *wanting to stay on campus*.

**c. Social and Emotional Needs:** *Describe the programs, resources and services (internal and external) that your proposed school will provide in order to meet the social and emotional needs of the students you serve. Explain how individual students will be identified and monitored on an ongoing basis at the school. Describe how the effectiveness of these programs will be measured.*

All PUC schools offer students, families and faculty/staff clinical counseling services. We provide access to marriage and family therapy interns at the school site, supervised by fully licensed clinical therapists, through our partnerships with universities' MFT and PPS credential programs. In addition, PUC employs three experienced, certificated senior counselors to train, supervise, and *monitor* the university students who complete their internships by serving our students and families. PUC takes responsibility for monitoring the in-house counseling system. Our continuous feedback loop involves fully licensed therapists monitoring counselors, students evaluating the services they are receiving, the PUC organization monitoring reports from the licensed therapists. When any aspect of the monitoring reveals problems, adjustments are made to allow the PUC organization to deem the student/family involvement in the counseling to be moving in a positive direction.

The **first point of identification** of our students and families who could benefit from counseling is most often a teacher – the advisory system is an especially effective arena as advisors develop close relationships with students - but any staff member can bring a case to the attention of our counselors. Parents are made fully aware of our services and often approach administrators and teachers to seek counseling for themselves or their children. Students (and sometimes their parents) may be referred for counseling as a result of a Family Support Team meeting which is held if a student is struggling in school academically and/or behaviorally and interventions have been implemented with no apparent results.

**d. College and Career Readiness:** Describe the specific programs that your proposed school will provide to expose students to college and career opportunities as well as support them to be successful in whichever pathway they choose.

**Early College.** Every student enrolled at our school will develop an Individualized College-course Plan (ICP) no later than the second semester of the 9<sup>th</sup> grade year. Some college classes are taught on campus while some courses require students to attend the college campus - either Los Angeles Trade Technology Community College or Los Angeles Community College. Each student works with a college advisor to create an ICP that considers: a student's academic interest, ability to obtain high school course credit based on the LAUSD-LA Community College District Dual Enrollment Agreement and the transfer agreement between LA Community College District and U.C., and the transfer agreement between the LA Community College District and the Cal State system. The college advisor, student and parent will be responsible for monitoring a student's progress through his/her ICP.

PUC schools will pay all costs associated with college course tuition/ fees and textbooks any fees for consumable items will be paid for by the student. Financial aid in the form of grants for consumable items will be awarded based on a student's need.

We maintain communications with all of the colleges attended by our alumni in order to inform our educational program and make adjustments in areas our students require remediation. For this reason, we have joined the College Ready Promise and are utilizing the Gates Foundation Grant to investigate student needs that colleges identify and the best way to develop teacher effectiveness in these areas.

**Career Readiness.** Our students take a series of questionnaires and surveys (through our college counseling Naviance system) to help them determine learning styles and college/career interests. They benefit from internship and employment opportunities with local businesses, non-profits, and various government agencies. Furthermore, as the State standards in social studies courses regularly refer to jobs and the economy, we identify those lessons as learning opportunities to bring in guest speakers and provide students with practical answers to their questions about career paths and options.

**e. Parent Involvement:** *Discuss strategies to authentically and meaningfully engage parents and guardians in their child's education. Describe in detail the programs or resources that the proposed school will provide for parents and guardians.*

The philosophy at all PUC Schools is that parents are our most important partners. We communicate this message continuously, during meetings, in newsletters, 1-to-1 and through any means available. Parents are also constantly reminded that the school belongs to them as it does to the staff and students and that we are a team on a level playing field, all shooting together for the same goal. The culture at PUC is such that parents must be treated with honor and respect at all times. They are welcome to observe classes at any time and give feedback on instructional programs. They are invited by the Instructional Leader to attend breakfast forums to share their collective observations of classroom visits.<sup>3</sup>

<sup>3</sup> Learning Walks: Family and community members are invited to join teachers and students in Learning Walks that provide a view into daily instruction in all our classrooms. The Learning Walk team visits all classrooms observing for instructional indicators in alignment with our vision

Parents participate in monthly Family Meetings – led collaboratively by administrators and parents and, at times, teachers and students. These meetings cover: school and home strategies to improve academic achievement, review of assessment results and follow-up action plans, parenting adolescence, college entry. It is also a time for our schools to learn from parents by hearing their concerns, ideas and questions. Our average attendance at these meetings is 80%, a significant percentage given the demands on our parents' time. Noticeably, parents have responded positively to these meetings and many have stated in parent surveys that they have become inspired to pursue college degrees.

All parents are placed in randomly selected Learning Circles utilized to engage in in-depth discussions around supporting student learning, sharing in governance decisions, and developing leadership capacities within the school. School administrators, in collaboration with a teacher committee devoted to Learning Circles, provide resources, support and facilitation for these groups at monthly meetings. Through this process, parents are empowered to advocate for their students needs and for their education during their time at a PUC school and beyond.

Additionally, the School Advisory Committee meets monthly and sets school improvement goals. This committee of faculty, parents, and administrators is described in greater detail below (**Governance 10. c. ii.**) and possesses genuine authority to identify, evaluate and design programmatic changes to the school's programs. A Parent Activities Committee works tirelessly, raising approximately \$20,000 annually, to provide extra funding for arts instructors and to support arts activities for the school.

**f. School Calendar/Schedule:** *Provide a copy of and describe the proposed school calendar and daily schedule for both faculty and students. In your response, please discuss how students and faculty will be grouped for instruction; the target class sizes and teacher-student loads; and how the proposed schedule promotes student achievement.*

*i. Autonomy: Describe how the school will use scheduling autonomy to maximize learning time for students and collaborative planning and professional development for the faculty and staff.*

**Appendix IV** contains our calendar and bell schedule. We implement a schedule to maximize learning and provide 10 professional development days on top of the 176 student days. As an independent charter school, we have the autonomy to provide extended periods of learning for students and ample planning time for teachers in the same subject AND the same grade level. Transparent scheduling makes students aware that teachers collaborate, modeling for students who are also required to collaborate with one another. The flexibility afforded to charter schools in terms of changing bell schedules as needed in order to better meet the needs of students is embraced by PUC schools. For example, in response to data we have elongated particular class periods, inserted periods and held Saturday classes.

We do not track (group) and allow any student who is interested to enroll in A.P. courses. The student load for a teacher is 100–120 in comparison with 150+ in a traditional public school setting. High school class sizes vary from 18-28.

**g. Policies: For Independent Charter Schools Only**

Describe and/or attach the proposed school's policies as they relate to promotion, graduation and student discipline.

**Handbook in Appendix V.**

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and instructional philosophy. After each classroom, the team lists the indicators that they saw and generate questions to prompt thinking around the indicators that were absent. These findings are shared with the staff and used to prompt action planning and improvement goals.



#### 4. Assessments and School-wide Data (4 pages)

**a. Assessment Philosophy:** *Explain the proposed school's philosophy on student assessments. Provide evidence that proposed school's assessment philosophy is research-based and is aligned with the schools proposed Instructional Program.*

If the vision of academic and personal success for each student is to be achieved, measurements must begin immediately, appropriate follow-up must follow, and further assessments with accompanying analysis must occur on a regular and ongoing basis. We believe that students' learning gaps must be filled as soon as they are identified. Therefore, assessments will begin for entering students at the onset of the academic year, in order to immediately identify and appropriately address strengths and weaknesses. These gaps will be identified through a variety of assessments and filled through the application of a variety of strategies described in *section 2*.

Research on charter schools has demonstrated the correlation between the schools with the most impressive results in elevating student achievement to the use of assessment to diagnose student needs and adjust teaching strategies to effectively meet those needs. *The teacher analysis of the assessment allows for a pattern of continuous reflection and improvement; a key element contributing to the success of the schools that have a similar population as our proposed school.*<sup>4</sup> By establishing consistent school-wide assessments – both formative and summative - and administering them on a consistent basis, teachers can always determine which performance standards students have mastered and which are still to be addressed.

Given our emphasis on data driven instruction, we believe in the importance of triangulating assessment data to determine students' progress towards end goals and to validate the various assessment tools that have been implemented. This practice is supported in research by Mike Schmoker, Larry Lezotte and Douglas Reeves in that they each advocate that students are pre-assessed and then given specific benchmark exams along the way that are evaluated and analyzed by different stakeholder groups including teachers, administrators and parents and students to determine additional supports needed to meet the end goal by June.

The triangulation of data occurs between the CST, CAHSEE, and student grades in their courses. Student grades reflect both student performance on tests and student demonstrations of their achieving learning standards by producing products, solving problems and making written and oral presentations. Every graduate will compile a performance portfolio that summarizes and presents samples of achievements, projects completed, competencies gained, examinations passed and credit earned.

During the summer months teachers and administrators review the CST results and match these results to the grades students received for achievement of standards addressed in the scope and sequence of each course. When reviewing students' grades, students who either passed the course but did not earn proficiency or students who did not pass the course but did earn proficiency will be reviewed to determine the cause of contrary results. In addition, the teacher will review the scope and sequence along with major assessments to determine alignment and make adjustments for the subsequent year. The data review process will then lead into a goal setting process for the year.

**b. Autonomy:** *Describe how the school will use assessment autonomy to maximize student learning.*

<sup>4</sup> Innovation in Education: Successful Charter Schools. U.S. Department of Education Contract No. ED-01-CO-0012, Task Order D010, with West Ed. Rod Paige, Nina S Rees, Michael J. Petrilli and John Fiegel. [http://www.uscharterschools.org/pub/uscs\\_docs/scs/full\\_print.htm](http://www.uscharterschools.org/pub/uscs_docs/scs/full_print.htm)

As an independent charter school, we have the autonomy to empower teachers to design and implement a variety of assessments in order to form a complete picture of student skills and knowledge. We also have the autonomy to create a culture of collaboration, a schedule of multiple meetings each week, and a support system including trained Instructional Leaders and the Home Office Instructional Team. These practices work together and allow us to quickly gather assessment data, analyze, and respond to student needs through appropriate intervention in order to maximize student learning. In addition to the above, PUC schools has developed benchmark assessments in all content areas which will also be utilized at the new school. Home office personnel

Our school-wide emphasis on producing products, solving problems, making written and oral presentations can all provide formative assessments (drafts, in-class individual work, group work in-class, practice runs of presentations, etc.), thus allowing teachers to support students prior to a summative assessment. By identifying gaps and needs on a daily basis, teachers can prevent poor performances on summative assessments. In addition, by evaluating students on a daily basis, teachers can gather formative data prior to summative data to share with colleagues, Instructional Leaders and the Home Office Instruction Team in weekly meetings – thereby gaining additional ideas for adapting classroom lessons to maximize student learning.

**c. Student Assessment Plan:** *Describe the school-wide assessment plan for the proposed school. What formative and summative measures will you use to determine student progress and success? Include a table that details specific authentic formative and summative assessments (benchmark assessments, developmental screenings, unit exams, state-required exams, portfolios, etc.) that will be used for each grade level, the timing of their administration, the rationale for their selection and their intended purpose.*

Our approach to assessment requires that faculty and staff closely monitor each student’s progress on a regular basis using the following strategies:

- Performance tasks and assessments including pre-assessments
- Publisher and teacher generated assessments that are standards-aligned
- Student/teacher conferences
- Parent/student/teacher conferences
- Student led conference evenings utilizing portfolios
- Ongoing teacher observation
- Collaborative teacher teams’ examination of student work
- Progress reports six times each year and two semester grade reports
- State mandated standardized tests including CST, CAHSEE, CELDT pursuant to Education Code Section: 60602.5
- Community College Assessment, PSAT, ACT and SAT
- In-house benchmark assessments in all subject areas developed and utilized PUC wide.

The table below describes our assessment plan in more detail:

Measurable Pupil Outcome	Measurement Instrument(s)/ Frequency
Students will have strong reading, writing, listening, speaking and presentation skills. Students will be able to effectively communicate ideas, opinion and information orally and in writing.	<ul style="list-style-type: none"> <li>Classroom Assessments (on-going)</li> <li>Senior Portfolios (twice per year)</li> <li>PUC Writing Assessment Benchmark (three times each year)</li> <li>STATE Tests: CST, CAHSEE, CELDT, EAP (once per year)</li> <li>Interdisciplinary Grade Level Projects (three-four times each year)</li> </ul>
Students will apply and understand civil responsibilities in and outside of their communities. Students will have civic, historical, economic and geographical knowledge of diverse cultures/peoples throughout the world.	<ul style="list-style-type: none"> <li>Classroom Assessments (on-going)</li> <li>Senior Portfolios (twice per year)</li> <li>PUC Writing Assessment Benchmark (three times each year)</li> <li>STATE Tests: CST, CAHSEE, CELDT, EAP (once per year)</li> <li>Interdisciplinary Grade Level Projects (three-four times each year)</li> </ul>
Students will develop abilities to reason logically and learn and apply mathematical concepts in abstract and real life situations including those within algebra, geometry, trigonometry and other mathematical subjects.	<ul style="list-style-type: none"> <li>Classroom Assessments (on-going)</li> <li>Senior Portfolios (twice per year)</li> <li>PUC Math Assessment Benchmark (three times each year)</li> <li>STATE Tests: CST, CAHSEE, CELDT, ELM (once per year)</li> <li>Interdisciplinary Grade Level Projects (three-four times each year)</li> </ul>
<b>Students will successfully utilize scientific research and inquiry methods to understand and apply the major concepts from various branches of science which may include physics, chemistry, biology, ecology, astronomy and earth sciences.</b>	<ul style="list-style-type: none"> <li>Classroom Assessments (on-going)</li> <li>Senior Portfolios (twice per year)</li> <li>STATE Tests: CST, CAHSEE, CELDT, EAP/ELM (once per year)</li> <li>Interdisciplinary Grade Level Projects (three-four times each year)</li> </ul>
Over the course of the charter, CALS Early College High School will meet or exceed its API growth target each year exceeding 770 within five years.	<ul style="list-style-type: none"> <li>Academic Performance Index (API) Rating</li> </ul>
Per the state mandate CALS ECHS will grow their AYP target by the state score at minimum.	<ul style="list-style-type: none"> <li>AYP Growth Target</li> </ul>

All content classes will administer a series of four benchmark tests throughout the year that are standards-based and aligned to the CST, ACT and SAT. The goal of this practice is to support students to earn the highest possible score on the state and college entrance exams along with the best grades in their classes. Currently students take a pre-assessment test in English and math and then subsequent benchmarks during the year to measure progress and inform the teachers as to specifically which concepts needed to be re-taught, reviewed or refreshed along with those that students have mastered. Student growth in writing, literacy skills and math knowledge is measured by standards based, PUC created benchmarks that are aligned to State blueprints for the courses. In-house, PUC wide benchmark assessments are being developed for every course.

Benchmark assessment results are stored on Data Director and students' progress can be measured over time and compared with their CST results. In addition, results are reviewed by department and with the instructional leader after each testing period. Once this review occurs, teachers re-work their scope-and-sequence to address the learning gaps displayed by their different classes and provide information back to the students so that they can individually work on their own specific gaps. This cycle occurs after every testing and students' levels of improvement are tracked and shared with parents.

**d. Assessment Development:** *If applicable, submit a timeline that outlines plans to develop curricula for the proposed school prior to school opening.*

**N/A:** We will utilize the curricula, scopes and sequences and lesson plans from our existing high school serving this proposed school's particular location and population.

**e. Data Collection and Monitoring:** *Describe the school-wide data collection and monitoring plan. What data, including ISIS will the school collect to measure student progress? How will the school use this data to inform programmatic and instructional decisions, assess student needs, intervene with students who need additional help, improve instruction, make adjustments to curricula and other school components and inform professional development?*

Summer professional development always begins with a review of the state testing results and the prior year's School Success Plan goals. The staff is led through a reflection and data analysis process that leads to new goals being set in alignment with required AMO's and the school's vision. This process

results in the creation of action plans. Progress towards achievement of action plan goals is analyzed throughout the year through ongoing discussions between teachers and administrators, with a focus on classroom assessment results, student work, benchmark assessment results, classroom observations, progress reports, semester grades, and finals. Technology such as Zoom Data (Data Director) and PowerSchool enables efficient uploading, analyzing and sharing of data. Teachers are supported in order to address students' learning gaps through the creation of intervention classes and professional development targeting classroom differentiation strategies. With each progress report, and at the conclusion of the first semester, teachers review data with students in order to analyze what is needed to increase student success. Simultaneously, the instructional leader engages in dialogue with teachers in order to revise their scope and sequence in response to students' needs. Goal setting then takes place for semester 2. Results of the goals will be measured at the end of second semester with a goal check mid-way at the ten week mark.

The PUC-Los Angeles Board of Trustees holds the school accountable to this review process in that the school success plan is reported at the beginning of the year and then interim reports are made throughout the year. This accountability process helps the entire organization be fully invested in the success of all students and always seek the road of improvement.

More detailed descriptions on the use of data to inform professional development and instruction can be found below in section **5. Professional Development, subsection b.**

**f. Graduation Requirements:** *For all middle and high schools, describe the proposed graduation requirements, including how student progress will be measured to determine readiness to graduate.*

Our graduation requirements surpass the minimum requirements to apply for college. Ten units equal a traditional one-year course. 220 units, with a passing result, are required for graduation.

*Course Requirements for Graduation:*

UC/CSU Reference	Content	# of total credits needed to graduate
A	History: World, US, Government/ Economics	30
B	English	40
C	Math: Algebra 1, 2, Geometry minimum + Trig and Calculus(students must be enrolled in math for all four years (minimum of three years)	30
D	Lab Science: Biology, Chemistry	20
E	Foreign Language: same language for two years minimum	20
F	Arts: music, dance, theatre, art (same course for two years recommended)	20
G	College Elective: Sociology, Psychology, second-year arts, or college class	10
Other	PE	10
Other	CAHSEE/ PSAT/SAT prep class	10
Other	Elective: arts, college class, advisory, 4 <sup>th</sup> year of math	30
	<b>Total</b>	<b>220</b>

*Note:* For A-G classes, students must earn credits for grades C and above.  
*Test Requirements:* Pass CAHSEE English and Math, Take the SAT 1 and ACT  
*Community and Other Requirements:* Community Service (40 hours total outside of school, with the exception of the recycling program), Apply to 3 colleges, Apply for FAFSA (if eligible), Complete personal

resume, Compose a portfolio either in a binder or digital

Students may *participate in graduation ceremony* with 210 credits along with meeting all the test requirements. Students will *receive their diploma* when they meet the test requirements and earned 220 credits. Students who complete the community and other requirements along with the required coursework of 220 credits will graduate with an exemplary status diploma.

## 5. Professional Development (7 pages)

**a. Professional Culture:** *Describe the professional culture you envision at the proposed school. Explain how the professional culture you envision reinforces the Instructional Program outlined above. Identify activities and structures that will support the achievement of the professional culture envisioned. Discuss how you plan to introduce the activities and structures to teachers.*

In keeping with our vision of a collaborative learning community, we believe it is important for all faculty and educational leaders to be comfortable sharing strengths and weaknesses, expressing concerns and questions, and both providing and accepting guidance. We begin introducing our envisioned culture through orientation programs prior to school opening that give faculty and leaders extended practice with the following activities and school-wide structures: **Tribes Community Learning Circles** (described in section 3.), **Critical Friends** groups, and **peer observations and analyses**. Detailed agendas describing our summer professional development programs can be found in **Appendix VI**. A week-long orientation for site leaders occurs over the summer, during which they experience professional development with the other PUC school Instructional Leaders and the Home Office Instructional Team. After this, each site leader will conduct a teacher orientation program with his or her staff. New faculty will always experience two weeks of orientation over the summer, as will new school leaders, while returning staff will join for only the second week. Prior to the school's first year, all staff will experience two weeks. This orientation will be led by the site-based Instructional Leader with the Home Office Instructional Team joining for specific activities. These professional development experiences are designed to be engaging, joyful, hands-on, and practical. Beginning with the **Tribes Community Learning Circles** (described in section 3.), sessions will draw out each teacher's existing strengths and provide opportunities for these teachers to take on leadership roles. This sets a tone for productive learning throughout the year in ongoing Learning Circles, **Critical Friends** groups, and **peer observations and analyses**.

Since our Instructional Program emphasizes data driven instruction, our professional culture will be one that embraces ongoing data analysis. School-wide data trends and teacher feedback (respected as a significant, qualitative data point) will form the basis of weekly staff development meetings. These meetings will focus on teacher collaboration, whole group learning, planning, and school wide updates. Time will also be allotted for continued planning supported by one-on-one coaching from the Instructional Leader. Departments will collaborate during the weekly staff meeting, allowing them to pursue department goals and projects. In addition, departments and whole staff inquiry groups will be scheduled that focus on presentation of teacher dilemmas that affect student achievement. The staff will use a **Critical Friends** protocol to discuss lessons, assessments, task lists, and student work.

**b. Professional Development:** *Describe what effective Professional Development (PD) will look like at your proposed school. Identify the school's goals and strategy for ongoing PD. Explain how the PD plan will be driven by data to build coherence and support the instructional program as well as build capacity to improve teaching and learning, school performance and student achievement. How will the PD program be differentiated to support teachers at various stages?*

**PD Plan.** The overall goal of Professional Development (PD) is to improve teaching and learning as measured by student work products (portfolios), student performance on assessments, feedback from colleges on our graduates' competence, and students' post-graduate dedication to pursuing college and career goals. Therefore, PD at our proposed school will be considered effective if teacher satisfaction surveys and student achievement data indicate a positive correlation between PD and student learning.

The specific goals and strategies of our PD are determined by our data-driven 'School Success Plan'. Each of our schools creates a School Success Plan in July when the Instructional Leaders review the school's state testing results. This process follows the Grant Wiggins Backwards Planning Practice where one begins with the end goals first. The Instructional Leaders will determine in which areas the school met the goals based on the various exam results and which areas the school did not meet the goals. The Instructional Leaders will analyze the data to determine which sub-parts presented a struggle for students. With these sub-parts identified the Instructional Leaders will create a draft of the School Success Plan and be sure that the identified sub-parts are identified in the key results that will be measured through internal assessments at the school site. Once this draft is designed, *the Instructional Leader will lead the staff in a professional development session during the summer that is focused around the school's results and the data.* This professional development includes the following steps:

- 1) The Instructional Leader meets with each teacher and shares with him/her the student data from the CSTs, CAHSEE and ELM or EAP. They look at the summary results along with the School Success Plan goals from the year before. The use of Data Director/Zoom helps make the data accessible to all team members and serves as an on-going reference point throughout the year. Together they check off what was achieved and celebrate these achievements. Then they identify areas that were not successful and reflect on why we did not achieve these results and what can be done differently in the coming year.
- 2) After these individual meetings, teachers design their scope and sequence for the year, making revisions from the year prior to address the areas where we did not achieve our goals.
- 3) Once everyone meets with the Instructional Leader, we share the school data and teachers within departments and as whole group reflect on the prior year and identify ways we can change our teaching practice to yield greater results. Action steps result from these meetings.
- 4) Next, the Instructional Leader shares a draft of the School Success Plan with the teachers and solicits input and modifications by department members based on the individual data sessions along with the department's collective data results. The department makes adjustments to the key results, action steps and time lines. The Instructional Leader will take these edits and revise the School Success Plan.
- 5) The Instructional Leader provides copies of the School Success Plan to the teachers by mid-September.
- 6) Following the summer professional development sessions, the staff revisits the School Success Plan and revises action steps while measuring growth towards our key results at least four more times during the school year. In addition, there are modifications made to the key results to insure that each is measurable and aligned to our necessary school outcomes to move the school from a good to a great design. Full day professional development sessions in the months of October, December, March and inquiry sessions in May and June provide the staff with the opportunity to review the internal data, measure progress on action steps and provide revisions to their own scope and sequence based on the data.
- 7) The PUC Board of Trustees holds the school accountable to this review process in that the School Success Plan is reported at the beginning of the year and then interim reports are made throughout the year. This accountability process helps the entire organization and each school to be fully invested in the success of all students and always seek the road of improvement.

**Targeted and differentiated.** In addition to this focused approach to PD, teachers will meet with the PUC Home Office Instructional Team, Regional Director and the Instructional Leader on a regular basis to:

- Share teacher concerns



- Communicate teacher requests
- Articulate program progress and effectiveness
- Assess overall student progress, achievement and needs
- Discuss concerns regarding individual student progress and needs

**Differentiation.** PD is informed by more than student data; needs assessments completed by teachers and an assessment of new hires also drives our PD. Each teacher works with the Instructional Leader to design a personalized Professional Growth Plan that consists of goals and a specific action plan to support those goals. Our schools have adapted a coaching model similar to what Hall and Simeral describe in “Building Teachers’ Capacity for Success” where the emphasis is reflection and self-awareness. The “continuum of self reflection” is key to determining topics and approaches for designing effective professional development. (Hall, P& Simeral, Building Teachers’ Capacity for Success; 2008).

In addition, our needs assessment led us to form partnerships focused on specific teachers and specific subject-type teachers. For example, we partnered with CSU Northridge to train our English teachers in specific strategies to support students to pass the college entry-level English tests. Within this training, teachers learned new ways to teach writing and develop units that incorporate a significant amount of non-fiction text. As another example, teachers have participated in the Loyola Marymount University Math and Science Teacher program, which is a year-long PD. This PD was designed in modules and included a monthly training, observation and feedback in addition to on-going coaching designed around improving math instruction and making it more about proficiency based.

To further support classroom instruction and resource students, teachers meet with the Resource Specialist who also conducts professional development sessions for staff throughout the year. During these meetings, the resource specialist discusses PD topics based on the disabilities represented in the school population. Teachers discuss recipe cards, delineating each resource students’ disabilities, as well as strategies to support, the progress, accommodations used, and support needed to meet the needs of students with IEPs. Teachers also discuss students with academic challenges who do not have an IEP and the types of interventions that can be used to support those students’ academic challenges. A scope and sequence for professional development with the Resource Specialist is developed and given to all teachers for feedback. Professional development topics include recipe cards, grading, support strategies, referral process, and intervention.

**c. Teacher Orientation:** *Describe the induction program for new and existing teachers. Discuss how this program will prepare teachers to deliver the proposed curriculum, utilize the instructional strategies and differentiate instruction.*

During the summer, all new teachers to PUC come together and engage in 5 full days of professional development that are designed specifically to meet their needs and provide them with a thorough orientation regarding all aspects of PUC and also prepare them for a successful school year ahead in terms of facilitating student growth and achievement. One half of each day is spent in a classroom lab setting with children and a master teacher. The teachers are instructed in advance regarding what they are specifically to observe (such as opening and closing routines, engaging students, assessments, classroom management, etc.) and debriefing occurs each day following observations. This portion of the week is led by the Chief Academic Officer of PUC who is extremely experienced and a renowned expert in teaching and learning. The other half of each day is spent engaged in orientation regarding all other aspects that are important to the new teachers such as a greeting from the CEO who tells the history of

PUC and explains the mission, vision, commitments, etc., interfacing with the human resources team who tell them about payroll, benefits, due process, etc., interfacing with members of the IT team who tell them about computer usage and explain how to use programs and systems utilized by PUC such as PowerSchool and Data Director, interfacing with the PUC Director of Special Education who teaches them about IEP's, meeting the needs of students, etc. and more. The new teachers also spend one additional week at their own school site engaged in professional development with the existing teachers. During the site specific week, leaders and teachers discuss the attributes of a culture of high expectations and they make plans to implement and maintain this culture during the upcoming year. They review the most recent CST data for all students and collaboratively analyze and design action plans (School Success Plan) to fill learning gaps. Schedules and calendars are discussed, committees are arranged, goals for the year are determined, classroom and school-wide procedures are determined in order to ensure: consistency for the students, ELL and special education student needs are met, counselors at schools are appropriately utilized, differentiation is implemented in the classroom, and any other data driven issues.

At PUC, we fully realize that the abilities and effectiveness of our school leaders will be a key lever to our teachers reaching their potential and achieving high levels of effectiveness in terms of facilitating college readiness in 100% of our students. In order to ensure excellence and effectiveness in our leaders, we also provide them with professional development during the summer. New leaders to PUC come together for one week to engage in professional development tailored specifically to meet their needs as new leaders to PUC. During that week they learn about the culture, expectations, mission and vision of PUC, review the employee handbook and interface with members of the PUC human resources team in order to learn about expectations and benefits, etc., learn what is required in terms of compliance and reporting to the home office, learn about expectations regarding leadership, study the attributes of effective leadership, learn about the support they can expect to receive from the home office, discuss how to maintain an assessment based and data driven culture, how to coach teachers effectively, how to have difficult conversations with teachers, and many other topics. The new leaders also engage in one additional week of professional development with the existing leaders at PUC during which time they build relationships and network with colleagues, further reflect on and describe leadership practices to establish and sustain foundations of excellence, discuss programs and supports that build a culture of excellence, make plans for how they will engage their teachers in developing and sustaining a culture of success, etc.

**d. PD Calendar:** *Provide a tentative PD calendar/schedule that illustrates your allocation of time for PD activities throughout the year, including summer and collaboration time during the school day(if applicable). The calendar should include the areas of focus in support of the instructional program and the format of the PD. Additionally, discuss how the school calendar, daily schedule, interim assessment process, and staffing plans align with this calendar.*

**Appendix VI** contains a sample Professional Development Calendar – in use at our high schools – and a sample Teacher Schedule. The Sample Teacher Schedule identifies times to ‘plan’, times to possibly meet with a ‘coach’ or Instructional Leader, department meetings, grade level meetings, full staff meetings, etc.

As indicated in the attached Professional Development Calendar, intensive time is devoted to orienting new teachers in the summer, and orienting all teachers to the data-driven focus of our collaboratively-conceived School Success Plan. The Sample Teacher Weekly meetings in subject-specific departments for teachers, weekly full staff meetings led by the Instructional Leader, additional meetings <specific days/times/as needed> led by the Home Instructional Office Team related to specific needs of students for specific teachers focusing on those needs, ongoing coaching on a one-to-one basis.

**e. Program Evaluation:** *Describe how the PD program will be evaluated to assess its success and effectiveness on an ongoing basis. Discuss how the program will be modified to address areas of need that are identified.*

Steps 6 and 7 described in **section b. PD Plan** above describe the process of ongoing evaluation and modification as it relates to PD and our School Success Plan. In that same section, the **Targeted and Differentiated** subsection describes the way PD is personalized to specific teacher and student needs, demonstrating how our program has built in processes to enable immediate support when areas of need are identified. Furthermore, steps 1-5 in **section b. PD Plan** above describe the process of modifying the entire program between school years so as to continually build upon the previous year's successes and shortcomings. In addition to the School Success Plan, we use achievement data, observations, and coaching sessions to formulate objectives for the PD. To streamline the responsiveness of our PD, we use daily plus delta cards to evaluate all staff meetings. We use plus delta cards *and* survey monkey to evaluate full day PD. This data helps support the needs of the teachers in design and delivery of PD.

Most intrinsic to our culture of a collaborative community of learners, is a flexible approach to challenges throughout the year. Since PD is focused on identified student needs, if PD occurs and the students do not seem to advance in their learning, this realization will be recognized and addressed immediately. In this way, all faculty and instructional leaders are always evaluating the PD program and modifying it as needed.

**f. Autonomy:** *Describe how the school will use professional development autonomy to create a professional learning community in which faculty have time to collaborate to improve instructional practice and student learning.*

As described above, we exercise our autonomy to create: a schedule, calendar, explicit practices promoting a collaborative community of learners, a process of continually revisiting and revising the School Success Plan, a Small School and a leveraging of resources and talented educators across all of our schools. These all contribute to our generating an effective professional learning community.

## 6. Serving Specialized Populations (4 pages + attachments)

**a. Special Education:** *Explain how the proposed school will implement and monitor the special education compliance processes as well as instruction including assessment, Individualized Education Plans (IEP's) and the provision of special education supports and services utilizing the District's Special Education Policies and Procedures Manual as required by the Modified Consent Decree. Please complete the plan in Appendices C, D, & E.*

Please see **Appendix VII** for our complete Special Education Plan (from the RFP Appendices C,D, & E).

At PUC schools, we have the same vision for our special education students as we have for our students who are not identified as special education. That vision is that all PUC students will graduate from high school prepared for college success. A significant number of our PUC alumni who were identified as special education students during their years in PUC schools and received appropriate services accordingly, are now completing their course work towards Bachelor's degrees in 4 year universities. In alignment with our mission and vision, we believe all students will grow and excel, including those with disabilities.

For special education purposes, the school will operate as a school within Los Angeles Unified School District. The charter school will provide its own special education services and instruction to the students it serves, as set forth in the IDEA and in a similar manner to students enrolled in other public schools [California Education Code, Section 47646 (a)]. The school will provide each student identified with a disability; a free and appropriate public education in the least restrictive environment; an Individualized Education Program with an annual review and a 3 year re-evaluation; unbiased, comprehensive assessment conducted by an interdisciplinary team; all rights, protections and procedural safeguards specified in federal and state law and reiterated in local mandates and early identification of disability through "search and serve" procedures. Credentialed special education staff will provide all necessary services as detailed in each student's Individualized Education Plan (IEP).

We implement a full-inclusion program that has proven successful with our student population and work closely with the district to insure the school meets the quality assurance process for special education including verification reviews, coordinated compliance self-reviews complaints, and the local plan. Special education staff will assist the students in the understanding of the classroom material as it is delivered by the regular education teachers and will follow up class work and homework. All follow up support services that need to be delivered on a one to one or small group basis will be provided in a manner that will not interrupt instruction for the students in other core subject areas. Speech and language and counseling services will be delivered one to one and/or small group as is appropriate in order to meet individual student needs.

Prior to Los Angeles Unified School District ("LAUSD") Governing Board approval, we will either execute a Memorandum of Understanding ("MOU") by and between the Los Angeles Unified School District ("LAUSD") and our school regarding the provision and funding of special education services consistent with the requirements of the LAUSD Special Education Local Plan Area ("SELPA") Local Plan for Special Education or provide approved legal verification of membership in another state-approved SELPA with agreement to adhere to the LAUSD MCD requirements.

All Charter Schools chartered by the Los Angeles Unified School District ("LAUSD or the District") Governing Board are bound by and must adhere to the terms, conditions and requirements of the *Chanda Smith* Modified Consent Decree ("MCD") and other court orders imposed upon District pertaining to special education. The MCD is a consent decree entered in a federal court class action

lawsuit initially brought on behalf of students with disabilities in LAUSD. It is an agreement of the parties approved by the federal court and monitored by a court-appointed independent monitor. The MCD includes eighteen statically measureable outcomes and facilities obligations that the District has to achieve to disengage from the MCD and federal court oversight. All Charter Schools are required to use the District's Special Education Policies and Procedures Manual and Welligent, the District-wide-web-based software system used for online IEPs and tracking of related services provided to students during the course of their education.

As part of fulfilling the District's obligations under the Modified Consent Decree, data requests from Charter Schools that are not connected to the District's current Student Information Systems ("SIS") are made on a regular basis. The requested data must be submitted in the Office of the Independent Monitor's required format and are as follows:

- 1 The Independence Charter School Suspension/Expulsion Report, due monthly throughout the school year.
- 2 Paper SESAC Report and Welligent Student Listing Verification, due monthly throughout the school year.
- 3 CBEDS, which is due at the end of October of Each School Year.
- 4 All Students Enrolled December 1 of Each School Year, due at the end of December every school year.
- 5 Graduation Status of 12<sup>th</sup> Grade Students Enrolled on December 1, due at the end of June every school year.

The District is currently in the process of developing an Integrated Student Information System ("ISIS") as required by the MCD. Although most Charter Schools are not currently utilizing the District's current SIS, the MCD requires all Charter Schools to implement the use of ISIS once it is developed.

**7. Performance Management (2 pages + attachments)**

- a. **Performance Goals and Metrics:** Each applicant team is required to set clearly measurable student performance goals and mission-specific goals that will measure the success of your innovative school program. Schools will use the Performance Management Matrix, which will be available on the Public School Choice website in the coming month to provide this information.
- b. **Rationale:** Discuss why the proposed school will track the mission-specific indicators selected.

**TO BE COMPLETED AFTER FIRST ROUND OF APPLICATION – NOT DUE AT THIS TIME.**



## COMMUNITY INVOLVEMENT

### 8. Community Analysis and Context (3 pages + attachments)

**a. Description:** Describe the community you seek to serve. Include an analysis of the strengths, assets, values and critical needs of the community. Discuss your rationale for selecting this community and why the proposed school aligns with community needs and expectations.

Our rationale for selecting this community is entirely based on our experiences serving students and families in this region and our desire to respond to the many students on our wait lists who have asked us to expand opportunities for them to attend our small schools. PUC schools have been serving the Northeast Los Angeles area since 2000 when we opened CALS Charter Middle School. Three years later, we opened a high school (CALS Early College High School). In 2004, we opened a K-5 elementary school (Milagro Charter Academy) to serve students in this same area. Two years later, in 2006, local demand prompted us to open another middle school (Excel Academy Charter), followed by yet another one three years after that (Santa Rosa Charter Academy). CALS Charter Middle School and CALS Early College High School received the California Distinguished Schools Award in 2009. Milagro Charter School was awarded the California Distinguished Schools Award and the Title I Academic Achievement Award in 2010.

Since our schools have long waitlists and regularly outperform the local neighborhood schools, we believe our program would be a welcome addition to this region. Furthermore, in a community where the high school dropout rate exceeds 50%, the better than 90% graduation rate and college entry rate at our schools indicates that our Early College Program model could effectively address community needs.

The table below summarizes the local schools serving students in grades 6-12:

LAUSD Schools	# of students	Multi-Track School	Program Improvement?	Met Schoolwide Growth	Met Subgroup Growth	API Score	API State Ranking	Similar Schools Rank	Students Eligible for Free/Reduced	Major Ethnicity #1	Major Ethnicity #2	Major Ethnicity #3
CALS Early* College H.S.	345	N	N	Y	Y	732	6	10	80	Latino	African American	White
Franklin HS	2647	N	PI 5	Y	Y	639	1	6	73	Latino	Asian	Filipino
Lincoln HS	2777	N	PI 5	N	N	587	2	2	88	Latino	Asian	African American
CALS MS*	256	N	N	Y	Y	798	6	10	84	Latino	Filipino	Asian
Nightingale Middle school	1860	N	PI 5	N	N	690	2	2	100	Latino	Filipino	African American
Burbank Middle School	1462	N	PI 5	N	N	628	2	5	81	Latino	Filipino	Asian
Irving Middle School	1318	N	PI 5	N	N	692	3	5	86	Latino	Filipino	Asian

The Northeast area of metropolitan Los Angeles is comprised of 24 square miles with a resident population of approximately 241,400. Latinos make up 67% of the total population (Los Angeles Department of City Planning, n.d.). The 2000 census reported that of the total population over 24 years of age, 44.6% had an education attainment level of less than a high school diploma, 17.2% earned a high school diploma, 11.7% a college degree and 5.2% a graduate or professional degree. In 2000, the median income of the residents was approximately \$33,717 with 27.7% of residents earning below the poverty level (Los Angeles Department of City Planning, n.d.). According to the City of Los Angeles Department of City Planning, 98% of all households in the area speak a language other than English with 73.4% of all households speaking Spanish (Los Angeles Department of City Planning, n.d.).

If our current schools in the area are an accurate depiction of the proposed school's population, it can be anticipated that 94% of our students will be Latino, 2% African- American, 2% Caucasian, 1% Filipino

and 1% Asian. Eighty-nine percent of our students qualify for free or reduced lunch through the Federal Lunch Program.

We also anticipate similar demographics in relation to the educational level of our students' parents. By last measure, 40% of our parents did not graduate from high school, and fewer than 5% graduated from college or graduate school. In addition, most of our parents speak Spanish with little English.

While this community is in need of schools that can better support students in reaching proficiency at grade level standards and can better support students in preparing for and completing college, we do not view this community with a deficit mentality. On the contrary, an area that has traditionally been pointed to as challenge, is viewed by PUC Schools as an asset. Since parental engagement is considered essential to student success, Latino families' respectful distance from school authorities is often considered a challenge.

Research on Latino parents concludes that they traditionally believe that clearly-defined boundaries of educational authority exist. Barri Tinkler of the University of Denver outlined those perceived boundaries in his analysis of several studies:

*Latino parents see a sharp delineation between the role of the school and the role of the parents. The role of the parents is to provide nurturance and to teach morals, respect and good behavior. The role of the school is to instill knowledge. When parents are asked to take on responsibilities that they traditionally view as the domain of the school, they may be unsure of the role they are asked to play and they may feel that they are encroaching on the school's territory.*

Our founder, Ref Rodriguez, himself a Latino and native of Northeast LA, instinctively knew the power and value of *familia* in the Latino culture. He viewed this value as a strength and envisioned a school *familia* where parents, teachers, students and administrators worked together to achieve excellence for the predominantly first generation college-bound students. He knew that, if his schools could effectively connect with parents, the strength of *familia* could be harnessed and applied to the advantage of the students, families and entire community. In analyzing other schools, Mr. Rodriguez recognized that the traditional forms of parent involvement were not working. In fact, in many ways, he saw standard parental involvement programs as alienating toward parents who had little experience with the American school system or who had little formal education themselves.

In a collaboration effort of teachers and site-based Instructional Leaders, a strategy was created to empower parents and mobilize family support around the school's mission of college success for all students. This strategy consists of meaningful communication between parents and teachers, regular meetings of committed parent organizers, and integration of parent priorities into curriculum and school culture. This process was first introduced in CALS Middle School in 2004 and has been implemented in all of our schools as it successfully involved parents in a self-propagating cycle of increasing parental voice, involvement in the education of their children, and the creation of Expected School-Wide Learning Results that become central to the school's identity.

The broad steps are outlined below, but are described in greater detail in our WASC-related documents.

- 1) Identify parents who wanted to organize, not simply "active" parents who regularly showed up for school functions, but individuals who understood the power of relationships.
- 2) Personally invite these parents to conversation groups (community circles), a PUC schools tradition often used during orientations and school-wide meetings. Ask parents one simple but powerful question: "What do you believe is a healthy relationship between you and your child's

teacher?” Facilitators (administrators, teachers, parents, and office staff) guide the dialogue process. Each facilitator works with a group of parents and charts their responses to the question. One representative from each group presents responses, and parents speak in the language they are most comfortable speaking. Translators are provided.

- 3) During a PD day, teachers are led through similar conversation groups. They are asked to:
  - Reflect on personal experiences with parent engagement.
  - Identify the essential elements in creating relationships.
  - Identify what CALS had already done to build relationships with parents.
  - Create strategies and activities to be implemented during the school year.
  - Provide evidence showing how these strategies would be implemented per grade level.
- 4) Teachers connect their personal experiences to definitions of relationships between the school and its families. Next, teacher groups define key elements of meaningful relationships with parents and students. Faculty examine parent responses and match the key elements. This leads to meaningful understandings about parents and families. Teachers look at the entire picture, synthesize parent responses, teacher responses and discoveries from their meetings.
- 5) Strategies are developed for each grade level to address parent engagement in a meaningful way. Each grade level team commits to a number of engagement strategies such as: letter-writing, small team meetings with families of no more than 25 students, personal invitations to visit the school, and grade-level newsletters.
- 6) These efforts culminate with the first parent organizing meeting of the year. Two parent organizers are selected for each school team of 25 students. During this meeting, parents are asked “What does a parent organizer do?” Afterward, the administrative team sends personal thank you cards to parents for their participation.
- 7) At monthly meetings throughout the year, parent organizers define and refine their roles, expand a web of relationships between organizers and families and organize themselves around events of their choice. Events include:
  - **Back to School Night:** Parent organizers introduce themselves individually and as a group at this event, then facilitate a parent sign-up for classroom visits.
  - **School to Home Communication:** Organizers create a phone tree, e-mail group and a “yellow envelope” day during which parental consent signatures are carried home by students and returned.
  - **Parent Organizer Network:** The group incorporates a Parent Organizers write-up in the monthly newsletter and a roster of parent organizers’ names and contacts to travel home in the yellow envelopes.
  - **Parent-Faculty Creation (refinement) of Expected School Wide Learning Results**

This strategy led to WASC accreditation success as the reviewers documented the connection between parent engagement and achievement. In addition, this process shifted power to parents who progress into leadership roles – leading conversation groups, school orientations, et al.

**b. Background/Support:** *Describe your team’s history and experience serving this or a similar community. Demonstrate any existing connections or partnerships that your team has established within the community. Provide a list of community leaders, groups, organizations, institutions, or individuals that have pledged support for the proposed school.*

As described above, PUC schools have been serving the community since 2000. Over the years, we have worked closely with community organizations, leaders, institutions and individuals to join resources and best serve our students and their families. **Appendix VIII** lists organizations and individuals who we have worked with and intend to continue working with for this proposed school.

## 9. Community Engagement Strategy (2 pages)

**a. Engagement Plan:** *Explain the team's vision for engaging the community and the underlying theory that supports it.*

**b. Key Community Partnerships:** *Discuss the specific ways in which community members will be included in the ongoing success of the proposed school. Describe the role of key community partnerships throughout the first five years of the school and explain 1) how such partnerships will further the mission and vision of the school, and 2) who will be responsible for managing the cultivation of these partnerships.*

As the name of the organization (Partnerships to Uplift Communities) implies, internal and external partnerships are essential to our work. Central Region High School # 13 will benefit from PUC Schools' long history in cultivating partnerships with community based organizations and institutions that serve the area. As a community-based organization, we understand the importance of seeking out and cultivating partnerships. However, we are also aware that taking on too many partnerships all at one time can overwhelm a professional learning community and ultimately take the focus away from its primary mission. Therefore the school design team has been strategic in its approach to developing external partnerships. The team sees a three-pronged approach to developing the means of creating and sustaining the charter school by tapping into the following resource groups: 1) parents and the community at large (individuals, businesses, civic and cultural organizations); 2) higher education and other educational institutions and non-profits; 3) the charter community in Los Angeles and across the state.

Parents will choose to send their children to the PUC School at CR HS #13 because they believe in the school's philosophy and goals for students. As full partners in the school, parents will commit to participate in the development of the school by providing time, service, and/or resources, according to their resources. Parent representatives will serve on the governing board, participate in before- or after-school programs, facilitate service projects, or contribute services related to their professions or special talents. The PUC Schools leadership team has broad and deep experience in the educational and school reform arenas, specifically within the charter school movement. However, we see ourselves as a small piece of the collaborative tapestry which will develop and sustain the community-based charter school. The design team – led by the Regional Director working in collaboration with the CEO - will continue to meet with and work in collaboration with outside community agencies that already work with other charter schools the communities located in Northeast Los Angeles and who believe in the mission and vision of the school. These community organizations include the Los Angeles Boys and Girls Club, The Office of Councilmember Ed Reyes, the Northeast Education Strategy Group, the local parks and recreation centers specifically the State Park at Taylor Yard, One LA, and the Los Angeles River Center.

In terms of higher education and professional educational organizations, PUC Schools is focused on further building its partnerships with the Loyola Marymount University (LMU) School of Education, Center for Community Based Learning at Occidental College, Los Angeles Trade Tech College, and the National Council of La Raza (NCLR). The LMU School of Education has been a long time partner of PUC Schools. Dr. Ref Rodriguez, co-founder of PUC Schools developed the Charter School Leadership Academy at LMU which specifically trains educators for leadership positions in charter schools. Both he and Dr. Jacqueline Elliot currently teach in the program. The Center for Math and Science Teaching at LMU (CMST) currently works with the high schools in the PUC portfolio through the Math and Science Teaching (MAST) and Los Angeles Math and Science Los Angeles Math and Science (LAMS) residency programs. The MAST system institutionalizes an active culture of math and science teaching within a classroom, school and organization. The learning environment is transformed through active learning, active and shared assessment, and learning for long-term retention and cognitive understanding. MAST

embraces complexity and the interaction of academic content, pedagogy, and andragogy where the disciplines of math or science are at the core of all interactions. The LAMS program is an innovative and rigorous year-long teacher training partnership program that integrates practice, content, theory, and pedagogy through an in-field apprenticeship model within The College Ready Promise (TCRP) schools in the Los Angeles region. The PUC School at CRHS # 13 will benefit from the existing and expanding work with the LMU Center for Math and Science Teaching. We will expand our current partnership with Los Angeles Trade Tech College to offer early college courses at the new high school site. In addition we will begin to explore a dedicated partnership with Los Angeles City College which has plans to operate a satellite campus at the Van de Kamp site located a walking distance from CR HS #13. The community college has been unable to open the satellite campus due to severe budget cuts and is currently leasing the space to a charter school and city agencies. The National Council of La Raza has supported the work of PUC Schools for more than 10 years. Most notably, NCLR was the intermediary responsible for supporting (both financially and through technical assistance) the development of the Early College model utilized by our high schools. Currently, NCLR focuses its investment in the areas of early childhood education and high school reform, where the disparity between Latinos and other groups is greatest. The organization addresses the issue of education through a complementary, two-part approach that includes direct services to community-based organizations as well as advocacy for policy outcomes that will make the nation's public school system more responsive to the needs of Latino children. NCLR's programmatic division, housed under its Education Programs Component, provides capacity-building assistance including curriculum, program, and professional development to support and strengthen education programming at the community-based level.

The third approach to external partnership will focus on the charter community, including but not limited to LAUSD, Charter Schools Office, California Charter Schools Association, Charter Schools Development Center, Families that Can, and charter school peers in and around the Los Angeles area. Because most of the members of the design team have been involved in other charter schools, the design team has a solid and collaborative working relationship with the sponsoring district, LAUSD. We will continue to seek assistance and guidance from district personnel who have knowledge and experience in the areas particularly related to: special education, instruction and assessment, Title I compliance, budgets and finance, and facilities development.

## **GOVERNANCE, OVERSIGHT AND LEADERSHIP (5 pages + attachments)**

**a. School Type:** *Briefly explain the rationale for applying to operate your school as a traditional, Pilot, Expanded School-Based Management Model (ESBMM), Network Partner, Affiliated Charter or Independent Charter school?*

The PUC organization operates 12 independent charter schools and is seeking the opportunity partner with the district to implement another much-needed independent charter high school. Since our model requires a degree of flexibility and autonomy that aligns with this school type, we do not wish to digress from the program that has already engaged the community and is advancing student achievement in the region. At the heart of our program is the innovative Early College program that enrolls students in college courses while still attending high school and the empowerment and support of teachers as architects of student learning, permitting them access to any curricular resources and pedagogical methods that engage students in achieving standards-based academic success. In terms of governance, our collaborative and power-sharing model that includes parents and teachers and emphasizes accountability without organization-wide mandates lends itself to Independent Charter school status.

**b. Applicant Team Capacity:** *List the members of applicant team filing this proposal. Please be sure to include each person's affiliation with the school (e.g., principal, teacher, parent, community member, etc.). Include a brief biography of those persons who will take a significant leadership role in the proposed school. Provide evidence to show why the team has the collective capacity to successfully lead/transform a school.*

The following people are the members of the applicant team:

8. Dr. Ref Rodriguez – Co-founder of PUC Schools, founded all schools in NE Los Angeles and gave support to Dr. Jacqueline Elliot for the founding of PUC schools in NE San Fernando Valley
9. Dr. Jacqueline Elliot – Co-founder and CEO of PUC Schools, founded all PUC schools in the NE San Fernando Valley and gave support to Dr. Rodriguez in the founding of the schools in NE Los Angeles
10. Nik Orlando – Regional Director for NE Los Angeles PUC Schools, has worked with PUC for 10 years and supported the founding of all PUC schools in NE Los Angeles
11. Kelly Montes De Oca – Chief Academic Officer of PUC Schools has given academic and professional development support for all PUC schools on an ongoing basis, has worked with PUC for 9 years.
12. Dr. Kaye Ragland, Ed.D. – Serves as Director of Special Education for PUC and is an expert in all aspects of special education, has worked with PUC for 6 years.
13. Mara Simmons, Ph.D. – Instructional Leader of CALS Early College High School has been responsible for leading the instructional program at CALS Early College High School for the past four years. She was founding principal of Animo Leadership, the first school in the Green Dot Public Schools network.
14. Veronica DeLeon – A founding student of CALS Charter Middle School and CALS Early College High School and 2010 graduate of Occidental College.

### **c. School Governance and Oversight:**

**i. Autonomy:** *How will you use governance autonomy to create a culture of shared leadership and decision-making focused on high student performance?*



PUC-Los Angeles encourages all groups to participate in and share responsibility for the educational process and educational results. Our governance autonomy enables us to implement an organizational structure that will ensure active and effective representation of interested parties, including but not limited to parents (guardians), teachers, and students. This is accomplished in a number of ways that include the formation of School Advisory Councils at each of the PUC-Los Angeles school sites, a variety of targeted outreach activities to encourage involvement, and an ongoing emphasis on our culture of collaboration and shared decision-making. The School Advisory Council and our targeted outreach activities to gain faculty/family/student input are described below. Another significant effect of our autonomy is our ability to respond to concerns, questions and disinterest by changing our approaches and activities in order to maximize stakeholder involvement.

**ii. School Level Committees:** *Describe the decision-making bodies and general areas of decision-making responsibility for each body that will exist in the school. Detail how your school governance structure allows for a real and meaningful impact on school decision-making, and how they will interact with each other? Describe the process for gaining input from all stakeholder groups into decisions.*

The School Advisory Council consists of parents, students, community members, teachers and school site administrators. Each school's council will participate in developing recommendations for school policies and share in efforts to engage the support of the community. The council will make recommendations and decisions about issues related to the school and participate in reviewing parental and community concerns. The site-based Instructional Leader will be responsible for communicating all Council policy meeting notes and policy recommendations to the PUC-Los Angeles Board of Trustees. The Advisory Councils meet at least once per month and reports and minutes from the meetings and policy recommendations from the Site Advisory Councils are forwarded to the PUC –Valley Board of Trustees. School Advisory Council members are encouraged to attend the Board meetings. While its powers are 'advisory', if there is an unwillingness of school administrators to appropriately respond to this 'advice', PUC becomes involved if stakeholder surveys reveal a lack of genuine collaboration as befitting our mission.

**Process to Ensure Parent Involvement.** We believe that parent involvement translates into increased student achievement. Our philosophy is to encourage, honor and respect the parent voice. Parent involvement and the inclusion of the parent voice will be ensured in the following manner:

- Parents will elect 1 member per grade level to the School Advisory Council.
- School parent meetings will be held regularly and more frequently, if necessary, in order to facilitate the communication process between parents and the governing board.
- Parents will be encouraged to serve on the School Site Advisory Council.
- Parents will be consulted and advised regarding the school's educational programs and student progress through meetings and informational bulletins on an ongoing basis.
- A school web site will facilitate the dissemination of information on areas of specific interest to parents.
- Parents shall be informed regarding progress of students through student led and parent/teacher/student conferences, monthly progress reports, graded report cards, evaluations on portfolio projects and ad hoc meetings and access to PowerSchool.
- Teachers and administrators will have access to electronic mail to facilitate communication with parents who have e-mail accounts.
- Parents will be encouraged to provide service to the school in areas that will enhance the educational development of their children. Service opportunities will include but not be limited

to assistance in classrooms, tutoring, supervision, communications facilitation, clerical support, and supervision of student field trips. Service selections will be based on the strengths and preferences of parents and on student and school needs. Details of the type and times of service will be requested during parent/staff conferences held prior to the onset of each school year.

- Parents will also be encouraged to spend at least one full day per school year in the classrooms with the child.
- The school will provide parent workshops and education classes at times that are conducive and suitable for both stay home and working parents. Workshops may include the following:
  - Monitoring Your Child's Use of the Internet
  - Adolescent Psychology and Behavior
  - Helping Your Child with Homework
  - Planning Educational Family Outings
  - Planning Your Child's Educational Future (High School and College)

The content of these workshops will be designed to assist parents in the educational development of their children. We believe that if given the proper tools, parents will become equal partners with the school in the education of their children. We also believe that these workshops will help parents feel connected to each other and the school community.

**Process to Ensure Faculty Involvement.** One of the purposes for establishing a charter school is to allow teachers to become more involved in the governance and instructional program of the school. We recognize the importance of teacher input in matters that directly involve student achievement. To this end, the school's governance structure is set up to be inclusive of the teacher's voice. Teachers will elect two representatives to serve on the School Site Advisory Council. The elected teachers will represent the voice of the teaching staff and will act as a liaison between the teachers and the Advisory Council and visa versa. Teachers will meet on a weekly basis to collaboratively design standards-based curriculum and instruction, and analyze student work. Teachers will work in "lesson study" teams to deepen their knowledge of curriculum content and strengthen instruction. Teachers will meet with the PUC-Los Angeles Instructional staff, Regional Director and the Principal on a regular basis to:

- Share teacher concerns
- Communicate teacher requests
- Articulate program progress and effectiveness
- Assess overall student progress, achievement and needs
- Discuss concerns regarding individual student progress and needs

The administrators and the Board of Trustees will, at all times, honor and respect the teacher voice and welcome teacher input. Teachers will support and advise one another in the spirit of collegiality, on an ongoing basis.

**Process to ensure Student Involvement.** We believe that involvement of students will result in an increased sense of connectedness to the school community and instructional program, increased feelings of self worth and increased student achievement. Student involvement will be ensured in the following manner: Students will elect a student body president who will serve on the School Advisory Council. Students will also make presentations to the Board of Trustees. In this manner, the student body president will represent the voice of the students and support communications between the students and the School Advisory Council and Board. A student government body will also be set up at the school. A teacher will serve as advisor and mentor to the student government body. Students will

plan and implement student activities, fund raising events, and community service projects. Students will be encouraged to serve on any advisory council formed through a recommendation from the Board. Students shall be encouraged at all times to communicate freely and openly with the administrators, teachers and staff regarding concerns related to particular situations, conditions or the overall school program. Students will take an active role in articulating their needs and preferences related to the instructional program.

**iii. Governing Council:** *Describe the composition of the Governing Council and the process for membership selection.*

Our proposed school is governed by the Board of Trustees of Partnerships to Uplift Communities–Los Angeles and consists of nine (9) regular members (maximum) plus one seat for the sponsoring district. It is responsible for the governance, compliance and fiduciary health of the school. The process for membership selection is described in the by-laws. The Board establishes broad policies that affect all PUC-Los Angeles schools including staff hiring, benefits and compensation, conditions for student suspension or expulsion, controversial issues that affect more than one school site and teacher, and site principal and staff compensation criteria. Members of the Board also participate in raising funds, investing funds and increasing public awareness of PUC-Los Angeles’ work. The Board has assisted, and will continue assisting, in the raising of capital for developing the centralized services which support schools and for identifying and securing financing for permanent sites. Finally, the Board provides an external group that assists with our organizational goal setting, monitoring programmatic implementation, and setting a strategic vision.

The Board is led by Chairman John Biroc, Treasurer Ed Palmer, Secretary Jacqueline Elliott, and additional board member Dr. Jeanne Adams. Chairman Biroc brings clinical and educational expertise to the organization. He has received his Ph.D. in Counseling Psychology and a master’s in Education from USC, and has been an adjunct professor at UCLA, CSUN, Pierce College and Antioch University. Ed Palmer, Senior Vice President of Industrial Services Group at Grubb & Ellis, brings finance and real estate expertise to the organization. Dr. Jeanne Adams brings educational and nonprofit board development expertise. A former teacher, professor and administrator, she has founded and served on the board of several high performing charters in Southern California, leading successful capital campaigns that resulted in quality permanent sites. Her multiple realms of expertise include education, finance, fundraising, nonprofit governance and development. Another multi-asset member of the board, Dr. Jacqueline Elliot has been a teacher, administrator and the visionary founder of PUC schools located in the Northeast San Fernando Valley. She brings expertise in education, governance, school finance and operations.

PUC-Los Angeles encourages all groups to participate in and share responsibility for the educational process and educational results. The organizational structure of our schools is designed in a manner that will ensure that there will be active and effective representation of interested parties, including but not limited to parents (guardians). This is accomplished in a number of ways that include the formation of School Advisory Councils at each of the PUC-Los Angeles school sites. The Board reads minutes of the Advisory Council’s monthly meetings and analyzes survey data to ensure that the school administrators are appropriately responsive to all stakeholders.

## 11. School Leadership (3 pages)

**a. Principal Selection:** *Describe the criteria for selecting a leader for the proposed school, and explain how these characteristics align with your school's unique mission and vision. Additionally, describe the process that will be used to select the school leader. Please attach a job description for the Principal. If a candidate has already been identified, explain why this person is qualified to lead the proposed school.*

**Appendix X** contains the detailed job description for the Principal (site-based Instructional Leader). The leader of this proposed school will be a unique person as we require someone with both the expertise and outlook of a PUC school leader as well as a genuine desire to collaborate with others since this school will be occupying the site of several small schools. At a minimum, the Site-based Instructional Leader must:

- Hold a Bachelor's degree
- Hold an advanced degree or actively pursuing one (administrative credential preferred but not required).
- Have demonstrated leadership in curriculum design and implementation
- Have worked with students of diverse backgrounds and socioeconomic status

The Site-based Instructional Leader will:

- Be a member of the Instruction Team. He or she will be responsible for the instructional program of the school
- Along with the Regional Director, evaluate instructional staff effectiveness
- Ensure that all measurable pupil outcomes (as outlined in this charter) are met
- Provide opportunities for staff development and professional growth
- Oversee induction of new teaching staff
- Discipline students along with teachers
- Collaborate with other school models occupying the same site

**b. Leadership Team:** *Identify any leadership positions beyond the principal position. Discuss the role the leadership team will play in the development, implementation and evaluation of the Instructional Program. Discuss how the leadership team will collaborate with the faculty and staff to set goals, develop and implement the curriculum, assess progress in meeting goals and hold each other accountable for meeting such goals.*

In addition to the principal (site-based instructional leader) the school will have an Assistant Principal and a Dean. Job descriptions for these roles can be found in **Appendix X**. A PUC high school already has this formation of leaders and, several years of analysis have revealed the strengths of this structure.

Since the Instructional Program will be the same as the one in use at other PUC high schools, the leadership team will play the role of facilitator rather than developer/implementer, passing documents between teachers at CALS ECHS and their school, and creating opportunities for teachers at CALS ECHS to speak/email/meet with their teachers. Since the schools use the same SIS and shared servers, it is possible for faculty at both schools to access each other's lesson plans easily precluding the need for emailing/faxing.

It should be noted that the PUC School emphasis on data driven instruction will ensure that the Instructional Program is not a mere replication effort. As teachers evaluate students through multiple assessments (formative, benchmark, summative, work products, etc.), they will share their findings with

the leadership team at the school. Instructional Leaders will also share this data in their weekly professional development meetings with other PUC Instructional Leaders and Home Office staff. In this way, very quickly a collaborative effort will occur by which teachers and leaders identify student needs and strengths and adapt the curriculum and lessons accordingly. Standards-based assessments in the forms of standardized tests and a portfolio of student work will provide ongoing sources of data and the leadership team will implement professional development to target gaps as they arise.

**c. Principal Evaluation:** *Describe the annual process by which the principal will be evaluated. Please be sure to include the governing body or persons responsible for evaluation.*

Evaluations will be performed twice a year. The first evaluation will result in an action plan and the follow-up evaluation will refer back to this plan. The site-based Instructional Leader will be evaluated by the Executive Director based on:

- Completion of required and enumerated (from job description) job duties
- Implementing the charter and maintaining adherence to its guiding principles and requirements
- Overall successful school academic program and achievement of educational goals
- High parental and community involvement
- Creation of a school atmosphere of enthusiasm, warmth, and cooperation among all parties

Assessment tools will include staff and parent surveys, site visit, portfolio presentation and a rubric.

## 12. Staffing (5 pages)

**a. Staffing Model:** *Discuss the academic and non-academic staffing needs of the school from start-up through year five. Include all personnel along with the number and type of positions. Explain how the proposed staffing model aligns with the mission, vision and Instructional Program of the proposed school. Additionally, discuss how your staffing model ensures adequate instruction and services to special education and EL students.*

Administrators: Principal/Inst Leader, AP, Dean	3.00	3.00	3.00
Core Teachers	15.00	20.00	20.00
Art	2.00	2.00	2.00
PE	2.00	2.00	2.00
Academic Counselors	2.00	2.00	2.00
Resource Specialist/SpEd	2.00	2.00	2.00

Total Certificated FTEs

26	31	31
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office manager	1.00	1.00	1.00
Clerical	2.00	2.00	2.00
Supervision	3.00	4.00	3.50
Custodial	2.00	3.00	3.00
SpEd Assistants	2.00	3.00	3.00
Social/Emotional Counseling Interns	2.00	3.00	3.00

Total Classified FTEs

12.00	16.0	16.0
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Our staffing model in years 1-5 reflects the growth the school will experience from a school of 375 students in grades 9-11 to full enrollment in year 2 of 500 students in grades 9-12. From year 2 onward, the staffing model does not change.

The proposed staffing model for the PUC high school at CR HS #13 was designed based on previous years of experience in operating charter high schools and the unique needs of this particular site. We anticipate hiring a total of 26 certificated and 12 FTEs in year one when the school enrolls approximately 375 students in grades 9-11. Staffing will grow in year two to 31 certificated and 16 classified FTEs in year 2 when the school is at enrollment capacity serving 500 students in grades 9-12.

The staffing model assumes 10% of the students enrolled will qualify for special education services. In year one, we anticipate hiring 2 full-time certificated special education teachers and two full-time special education assistants. In year two, we will add an additional full-time assistant. Understanding our responsibilities to serving students with special needs, this staffing model may change to accommodate the number of students served and the various types of services needed. Staffing autonomy allows us to remain nimble with our staffing practices in order to best meet the needs of the students enrolled.



- b. Recruitment and Selection of Teachers:** Describe the criteria the proposed school will use to select teachers, and explain how the criteria align with your school's unique mission and vision. Discuss the schools planned mix of experienced and new teachers as well as any unique considerations needed to support the school design.

PUC schools are committed to recruiting and hiring a community of professionals who are dedicated to the best practice education of all students. Regardless of their role in the school, people hired by PUC Schools will actively help to promote the curricular philosophy, instructional program and the school community's guiding principles. All our employees must have potential or demonstrated effectiveness in working with students and parents from diverse backgrounds.

## **PROCESS**

The Instructional Leader will select his/her own staff and will not discriminate against any employee on the basis of race, color, age, gender, sex, national origin, actual or perceived sexual orientation, marital status, affiliations, political or religious beliefs, medical condition (cancer-related), physical disability or in retaliation. To best meet families' needs and the school's mission, employee recruitment will seek to create a bilingual, multicultural staff. All staff is expected to be sensitive to the linguistic and cultural needs of students, and to participate in staff development to enhance their skills in this area. For teacher candidates to be offered positions, the Instructional Leader will observe the teacher (either at current place of work or engaged in 'model' lesson at a PUC school), speak to references, and confirm resume.

The PUC Human Resources Department and the site-based Instructional Leader will recruit potential employees. A personnel committee will be formed each year and will have the responsibility of interviewing and making a recommendation to the Instructional Leader and the Executive Director on hiring employees for any vacant positions at the school site. The Executive Director is ultimately responsible for hiring employees on behalf of the school's board of trustees.

We require each employee to submit to a criminal background check as required by Education Code Section 44237. We will adhere to California laws, including fingerprinting, and prohibitions regarding the employment of any person who has been convicted of a violent or serious felony. We agree to comply with the provisions of NCLB as they apply to certificated and paraprofessional employees of charter schools. Prior to employment each employee must furnish an up-to-date Mantoux Tuberculosis (TB) test result, and documents establishing legal employment status. The school director and/or administrative designee will monitor and be responsible for maintaining records of tuberculosis and criminal investigation clearances, according to California and Federal laws, for all site-based employees.

## **CRITERIA**

PUC Schools comply with all minimum teachers' qualifications as defined by state and federal law, including California's definition of *Highly Qualified* under No Child Left Behind. At minimum, teachers at a PUC School:

- Hold a Bachelor's degree (Sec. 3.2.1)
- Hold a California Credential or an Intern Credential or Certificate for no more than three years (Sec. 3.2.2)
- Demonstrated core academic subject competence by: (1) Exam: pass a subject matter examination approved by the CCTC in each subject taught; or (2) Coursework: in each core subject area taught completed a) CCTC approved subject matter program, or b) Major, or c) Major equivalent – 32 semester units or the equivalent or d) graduate degree; (3) Advanced

Certification: National Board Certification in the core area; or (4) HOUSSE: Complete California's High Objective Uniform Standard of Evaluation. (Sec. 3.2.3)

- Have worked with students of diverse backgrounds and socioeconomic status
- Adhere to all requirements as specific in No Child Left Behind (NCLB).
- Demonstrate commitment to our mission and embrace multiple ways of teaching, assessing and mentoring our students

Ideal candidates possess the following qualities:

- Skill in utilizing Backward Design techniques in planning lessons and creating curriculum
- Commitment to the preparation of students for college success
- Experience in data driven instruction – analyzing multiple assessments, identifying student gaps and collaborative problem-solving to remedy student needs
- Enthusiasm for our culture of a collaborative community of learners, and interest in teaching in partnership with colleagues, students and families

Teachers at PUC Schools will:

- Provide a quality, enriching curriculum
- Provide continual assessment of student progress and maintain records
- Continually evaluate classroom performance to meet the changing needs of students
- Provide an effective classroom environment that reflects and facilitates the academic program
- Continue to work on professional growth
- Provide for open communication with all members of the school community
- Be a participating member of the Teacher Advisory Council
- Adhere to all school policies as established by governing councils

In terms of a balance between experienced and new teachers, our proposed school intends to open with a relatively equal balance. Wisdom that comes with years of experience and enthusiastic energy of the newly-committed teachers ensures an innovative, collaborative environment.

- **Autonomy: How will you use staffing autonomy to create optimal learning-centered cultures for students? For Pilot School applicant teams, please attach a copy of your draft Elect-to-Work Agreement that teachers will be required to sign.**

Staffing autonomy enables us to hire our own teachers who we believe will complement and enhance our vision of a relational culture committed to the success of each and every child. Since we believe in teacher autonomy and respect them as professionals who can design effective lessons and make appropriate curricular choices, we require staffing autonomy with at-will contract to ensure we hire and maintain a faculty capable of embracing this autonomy with dedication and maturity. While there are certain design elements that we at PUC believe are essential to productive and effective teaching and which the leaders will look for in lessons such as a *Do Now* when students first enter the classroom, accessing prior knowledge, extending prior knowledge, etc., even within this structure the individual teacher has a great deal of autonomy and room for creativity and personalization of how he/she teaches a particular lesson.

**Evaluation:** Describe the evaluation process for teachers. For internal applicant teams only, please discuss how your proposed evaluation process connects to and/or furthers the recommendations of the District’s Teacher Effectiveness Task Force.

Employees at the site will be evaluated utilizing a process and system developed by a Personnel Evaluation Committee, made up of faculty, staff, Instructional Leader and home office employees. Beyond evaluating an employee, the process will ensure individual professional growth. The evaluation format will incorporate a self-reflection, a peer evaluation, an administrative evaluation and the analysis of student achievement data (when appropriate). The site-based Instructional Leader is responsible for the evaluation of staff. The policies, procedures, and expectations for employee performance and evaluation will be enumerated in our employee handbook. The employee handbook will be developed in a collaborative process including members of the Board of Trustees, administrative staff, certificated staff, classified staff and community members with expertise in human resources, law, and personnel evaluation. The expectations outlined in the evaluation process will be designed to support the mission and vision of the school and to comply with applicable state and federal laws. Should it become necessary to terminate an employee for cause, the employee shall have the right to due process as enumerated in the school’s employee handbook. In the event a grievance is filed, we will adhere to the procedures enumerated in the employee handbook.

The procedure that will form the model for evaluating teachers, but may be adjusted with input from faculty after school opening, is as follows:

- Step 1: Teachers *collaboratively* select areas of focus based on the school-wide vision and annual instructional goals, known as the Minimum Expectations Evaluation.
- Step 2: The Instructional Leader makes periodic visits to classrooms and documents teachers' performance in each of the focus areas.
- Step 3: After several visits into a classroom, the Instructional Leader meets with the teacher and shares documentation. The teacher and Leader work together to develop professional development goals and objectives for which the teacher will be formally evaluated.
- Step 4: The Leader continues to observe and provide feedback based on the professional development goals and objectives developed in order to facilitate growth in the focus areas.
- Step 5: The Leader provides the teacher with a formal evaluation and, together, they develop goals and objectives for the following school year.

To prevent any confusion between evaluation of and support for teachers, evaluation will be specified and implemented explicitly. In a school that values collaboration, it is essential that teachers are comfortable requesting help in the form of professional development, teaching strategies, best practices and advice. Classroom doors should be open to all and, by separating evaluation from the daily lives of teachers, the instructional leader and organizational leaders can enter the classroom with only a positive effect. Our process of ensuring this involves the creation of a “Minimum Expectations Evaluation” – a school-wide set of indicators used for all staff members during evaluation sessions. The “Professional Growth Plan”, on the other hand, drives individual coaching and consists of individual teacher goals collaboratively developed with the instructional leader and a specific action plan in support of those goals.

### 13. FINANCES (3 pages)

- a. **Financial Sustainability:** Discuss how your school will sustain its vision, mission and goals relying only on regular District funding or charter funding.
- b. **Additional Funding:** To the extent that the implementation of your proposal requires additional resources beyond existing District or charter funding, please specify how the school plans to raise additional funds.

The PUC High School at Central Region High School # 13 will be self-sustaining in year one of operation. PUC Schools lean financial model ensures that 93% of revenue remains at the school site. Home office operations are offset by school contributions equivalent to 7% of revenue. Financial sustainability is possible in year one because unlike other schools in the PUC network the high school at CR HS #13 will not be required to pay anywhere from 12-15% of revenue for facilities costs on an annual basis. The school will not pay for any tenant improvements to convert a facility into a school. In addition, the school will operate at 75% enrollment capacity in year one and reach enrollment capacity in year two of operation. New schools in the PUC network generally depend on philanthropic support for the high costs of tenant improvements, the annual facility lease or mortgage, and the ability to grow one grade level at a time. By not adhering to this trend, the high school at CRHS #13 will be able to allocate most of its financial resources to programmatic operations in direct support of the vision, mission and goals of the school.

Below is a macro view of the annual operating budget for the high school in its first three years of operation. Extremely conservative estimates were used in the preparation of the budget. This includes no COLA increases in State revenue in the first three years of operation. The school will generate a surplus of revenue each of the three years. Ultimately the school site leadership team in collaboration with the site based governance council will make a recommendation to the Board of Trustees if it wishes to reinvest funds into the school once the school has reached a level of financial stability. PUC Schools recommends that a school have cash on reserve to cover 4-6 months of operating expenses.

Preliminary cash flow estimates reveal that that if the State continues to defer revenue the school will require a total of \$300,000 in cash through to its second year of operation in order to meet its financial obligations. The school will have access to a bridge loan through Broadway Federal Bank and will be able to pay back 100% of the loan in November of Year 3. PUC Schools has access to a line of credit from which to draw upon for purposes of supporting this school should it be required due to unanticipated deferrals in State revenue.

	2011-2012	2012-2013	2013-2014
<b>Revenue</b>			
Revenue Limit	2,186,306	2,915,075	2,915,075
Sources			
Federal Revenues	323,700	431,600	431,600
Other State Revenues	715,610	879,146	804,146
Local Revenues	7,780	15,560	25,840
<b>Total Revenue</b>	<b>3,233,396</b>	<b>4,241,381</b>	<b>4,176,661</b>

<b>Expenses</b>			
Certificated Salaries	1,468,500	1,805,460	1,834,038
Classified Salaries	190,800	206,108	255,778
Benefits	407,258	491,689	503,113
Books and Supplies	409,181	533,512	543,250
Operating Expenses	313,588	409,147	409,866
Capital Outlay	71,000	71,000	71,000
Fixed Costs	143,756	184,758	185,008
<b>Total Expenses</b>	<b>3,004,083</b>	<b>3,701,674</b>	<b>3,802,054</b>
<b>NET</b>	<b>\$229,313</b>	<b>\$539,707</b>	<b>\$374,608</b>

### IMPLEMENTATION PLAN

PROPOSAL ELEMENT	TIMELINE	RESPONSIBILITY	RESOURCES	EVIDENCE OF SUCCESS	EVALUATION PROCESS
What element of your proposal program will be implemented	In what year will you implement this element of your proposal?	Who will lead the implementation of this element?	What resources are needed for a successful implementation?	How will you know you are making progress post-implementation?	What mechanisms will you use to measure progress?
Hire staff	Prior to opening, prior to second year, and ongoing as needed	Principal	PUC Human Resources Department	Completion of hiring process for all positions filled appropriately with highly qualified individuals	Ongoing dialogue between PUC HR team, PUC CEO, Principal, and Regional Director
Recruit students	Prior to opening	LAUSD and Principal	Outreach efforts to community delivered by PUC staff in collaboration with LAUSD	Full enrollment	Data base of enrollees
Engage all staff in professional development	During summer prior to opening	PUC home office staff and school leaders	CAO, PUC instructional team, Regional Director, High School Director, school leaders	Attendance at PD, evaluations of PD delivery, use of practices and strategies learned	Evaluation of meaningfulness of PD completed by staff
Build college going culture	one and ongoing	All staff	Regional Director, High School Director, experienced PUC staff	Behaviors and attitudes of students	Academic achievement, graduation rate, college entry
Implement high quality instruction	one and ongoing	teachers	Effective teachers and effective teacher coaches	Student achievement	Classroom observations by Principal, CAO, and Regional Director
Deliver high quality coaching to teachers	one and ongoing	Principal	PUC CAO, Regional Director, High School Director, and Principal	Progress of teachers regarding increased effectiveness	Regional Director and CAO observe principal coaching teachers
Design and implement exemplary after school program	one and ongoing	Dean of students	Experienced PUC personnel	Attendance and full engagement of students in all after school components	Student surveys and attendance rosters
Assess students and respond to assessment results with timely intervention	one and ongoing	School leaders and teachers	School leaders and staff and High School Director	Increased student achievement by intervention students	Regional Director, High School Director, and Principal observations of intervention delivery, student surveys



# **Central Region High School #13**

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## ASSURANCES FORM

*Please check the school model that you have selected for your proposal:*

- ☐ Traditional
 ☐ Pilot
 ☐ Network Partner
 ☐ ESBMM  
☒ Independent Charter
 ☐ Affiliated Charter

Name of School Central Region High School #13

Name of Applicant Group/Applicant Team Partnerships to Uplift Communities

Lead Applicant Dr. Jacqueline Elliot

Title of Lead Applicant Co-founder & CEO, Partnerships to Uplift Communities

Mailing Address 111 North First Street, #100, Burbank, CA 91502

Phone Number 818-559-7699 Fax Number 818-559-8641

Email Address j.elliott@pucschools.org

Website (if available) www.pucschools.org

**By signing this Assurance Form, you agree that you will comply with and/or provide supporting information for the following assurances:**

**1. Assurance that an Applicant Organization/Applicant Team is NOT a For-Profit Entity**

*Please check one of the following statements.*

- ☐ The Applicant Organization/Applicant Team listed above is comprised of a *FOR-PROFIT* ENTITY.  
☒ The Applicant Organization/Applicant Team listed above is a *NOT-FOR-PROFIT* entity.  
*Documentation and certification of not-for-profit status (e.g. 501c3 form) must accompany this proposal.*  
☐ The Applicant Organization/Applicant Team listed above is *ONLY* comprised of LAUSD internal employees, departments, etc. (e.g. teacher teams, local districts).  
☐ The Applicant Organization/Applicant Team listed above is comprised of LAUSD internal employees, departments, etc (e.g. teacher teams, local districts) *IN PARTNERSHIP WITH ONE OR MORE NOT-FOR-PROFIT ENTITIES. Documentation and certification of not-for-profit status (e.g. 501c3 form) must accompany this proposal.*

**2. Assurance that an Applicant Organization is Solvent**

*(For External Organizations Only)* Assurance that a Not-For-Profit Applicant will provide documentation that demonstrates its solvency.

**3. Assurance of Enrollment Composition Compliance**

The Applicant Group/Applicant Team agrees that the student composition at a new or underperforming school will be reflective of the student composition at the schools it is intended to relieve (in terms of demographics, including but not limited to race/ethnicity, gender, socio-economic status, English Learners, Standard English Learners, students with disabilities, foster care

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placement), with ongoing review mechanisms in place to ensure retention and student composition at each school continues to reflect that of the overall school community.

**4. Assurance to Sign Separate “Service Plan for Students with Disabilities Assurances”.**

In accordance with the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act of 1973, the Applicant Group/Applicant Team listed above agrees to sign the Assurance Form entitled "Public School Choice Service Plan for Students with Disabilities" included with this RFP. Signing the Service Plan for Students with Disabilities Assurance Form assures that the awarded PSC school will abide by the conditions and requirements of the Chanda Smith Modified Consent Decree that includes: using the Welligent IEP Management System, using the LAUSD Elementary or Secondary Student Information System (either ESIS, SSIS or ISIS upon implementation), operating a compliant Special Education Program using the *LAUSD Special Education Policies and Procedures Manual*, and the annual completion and submission of the “School Self Review Checklist” for programs serving students with disabilities. Signing the Service Plan for Students with Disabilities Assurance Form also assures that operators of the awarded PSC school agrees to review Title 5, California Code of Regulations Section 3052, relative to the provision of behavior intervention plans and agrees to comply with all discipline practices, procedures for behavioral emergency intervention and prohibitions consistent with the requirements. The PSC school operators further agree to protect the rights of children with disabilities and their parents or guardians relative to 1) prior notice and consent, 2) access to records 3) confidentiality, and 4 due process procedures. The school will maintain a written description of the annual notification process used to inform parents/guardians of the policies regarding Nondiscrimination (Title 5 CCR 4960 (a)), Sexual Harassment (EC 231.5 (a) (b) (c), Title IX Student Grievance Procedure (Title IX 106.8 (a) (d) and 106.9 (a)) and Uniform Complaint Procedures (Title 5, CCR 4600-4671. Procedures must include a description of how the school will respond to complaints and how the District will be notified of complaints and subsequent investigations.

**5. Assurance that Independent Charter School Operators will sign and execute the Facilities Use Agreement**

*(For Independent Charter School Operators Only)* If selected to operate an independent charter school on a PSC campus, independent charter school operators agree to sign and execute the Facilities Use Agreement as provided by the District.

**6. Resident Enrollment and Attendance Boundary Compliance**

- *(For Independent Charter School Operators Only)* In accordance with the Attendance Boundary Waiver for Public School Choice Charter School Operators, operators of independent charters schools agree to provide first choice attendance to resident students from the corresponding attendance boundary established by the District if selected to operate a Public School Choice campus. Thereafter, any remaining available seats will be filled with any student who wishes to attend the PSC campus pursuant to the requirements of Sections 47605(d)(1) and 47605(d)(2)(B) of the California Charter Schools Act. The District’s waiver from the State Board of Education codifies these requirements.



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While PSC independent charter schools can initiate a lottery and/or enroll students outside the school's attendance boundary at any time, operators of independent PSC charter schools may not refuse any resident students unless the resident enrollment exceeds the District's established maximum enrollment for the school in question. Independent charter school operators understand and accept that the attendance boundary configuration is subject to change at the discretion of Los Angeles Unified School District and that the maximum number of resident student enrollment will be defined for a period of five years and that the requisite number will equal the planning capacity for the Public School Choice campus based on 2008-09 District norms.

If a parent or guardian no longer wants their child to attend an independent PSC charter school, the charter school operator must also agree to adhere to the District's "Enrollment Process for Charter Schools Selected to Operate a Public School Choice School." The "opt-out" decision is only valid for one academic school year. Once a parent has exercised his/her right to opt-out, he/she is unable to re-enroll the child in the charter school for the remainder of the school year, unless there is capacity at the school as designated by LAUSD and term of the charter. At the completion of each academic school year, parents have the opportunity to enroll their student at their neighborhood school again.

**7. Assurance that Independent Charter School Operators Will Cooperate with LAUSD in Attaining Applicable Waivers from the State Board of Education**

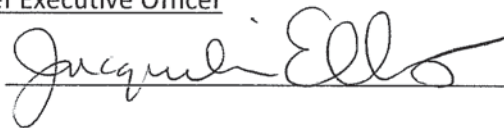
*(For Independent Charter School Operators Only)* In accordance with the Charter Schools Act of 1992 and its implementing regulations, independent charter school operators approved to operate a Public School Choice campus will be required to cooperate with the District in attaining any and all applicable waivers from the State Board of Education. Additionally, independent charter school operators must agree to waive their rights under Education Code 47614 ("Proposition 39") for a period coterminous with their Board-approval to operate a Public School Choice campus.

*By signing this Assurance Form, you agree that you will comply with and/or provide supporting information for the above assurances:*

Name of Lead Applicant Dr. Jacqueline Elliot

Title of Lead Applicant Chief Executive Officer

Signature of Lead Applicant



Date 11/30/2010

Name of Board President\* John Biroc

Signature of Board President\*



Date 11/30/2010

*\*The additional name and signature of the Board President is only applicable to organizations with*

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## LETTER OF INTENT

The Letter of Intent will provide formal notice to LAUSD regarding an applicant's intention to submit a proposal to operate a school on one of the new campuses or one of the Focus Schools mentioned above beginning in September 2011. The information presented therein is non-binding; specific details provided below may be finalized in the proposal submission.

Applicants must submit this Letter of Intent no later than **6:00pm on Wednesday, June 30, 2010**. If you have any questions about any of the requirements listed in the Letter of Intent, please contact LAUSD at 213.241.5104. Letters of Intent must be submitted to [psc@lausd.net](mailto:psc@lausd.net).


APPLICANT TEAM INFORMATION			
<b>Name of Applicant Team</b> <i>(If you are an organization, please include the legal name of the organization. If you are an internal applicant team, please list the name of the primary contact person.)</i>			
Partnerships to Uplift Communities Los Angeles (as part of the Northeast Collaborative for Quality Schools at Taylor Yard)			
<b>Address:</b> 111 North First Street, Suite 100 Burbank, CA 91502	<b>Phone Number:</b>		
<b>Website (if applicable)</b> <a href="http://www.pucschools.org">www.pucschools.org</a>	<b>Email Address:</b> <a href="mailto:m.simmons@puschools.org">m.simmons@puschools.org</a>		
<b>School site for which your team is submitting a Letter of Intent</b>	Central Region High School # 13		
<b>School type for which your team is applying</b>	Charter School	INDEPENDENT	
<b>List the name and contact information of your design team members below:</b>			
<b>Name:</b>	<b>Phone:</b>	<b>Email address:</b>	<b>School/Affiliation</b>
1. Mara Simmons		<a href="mailto:m.simmons@pucschools.org">m.simmons@pucschools.org</a>	PUC Schools
2. Nik Orlando		<a href="mailto:n.orlando@pucschools.org">n.orlando@pucschools.org</a>	PUC Schools
3. Leslie Chang		<a href="mailto:l.chang@pucschools.org">l.chang@pucschools.org</a>	PUC Schools
4. Catalina Saenz		<a href="mailto:c.saenz@pucschools.org">c.saenz@pucschools.org</a>	PUC Schools
5. Ref Rodriguez		<a href="mailto:rrodriguez@partnersdevelopingfutures.org">rrodriguez@partnersdevelopingfutures.org</a>	Partners for Developing Futures
6. Sascha Robinett		<a href="mailto:s.robinett@pucschools.org">s.robinett@pucschools.org</a>	PUC Schools
7. Connie Rivas		<a href="mailto:c.rivas@pucschools.org">c.rivas@pucschools.org</a>	PUC Schools
8.			
9.			

### APPENDIX III

#### Process for WASC Accreditation

PUC schools have successfully navigated the WASC accreditation process. Eight schools are currently accredited. Two schools that opened in the fall 2009 are entering the process. Two schools that opened this past fall (2010) are operating under the assumption that they will begin the process in 2011.

Below is the official document from WASC outlining the process:



## Steps for WASC Affiliation

**Step 1. Complete and Submit Request for WASC Affiliation**

Interested schools and supplementary education programs should complete the Request for WASC Affiliation form and return it to the WASC office. A \$150.00 application fee is required and should accompany the completed form(s).

Forms and additional information are available on the Getting Started with Accreditation page of the WASC website or by contacting the WASC office. If you have any questions regarding the accreditation process, please feel free to contact the WASC office.

**Deadlines:** Request for WASC Affiliation forms must be received no later than April 30 to schedule a fall visit and no later than September 30 to schedule a spring visit.

**Step 2. Complete and Submit Initial Visit School Description Report**

If after reviewing the Request for WASC Affiliation it is determined that your school or program is eligible for affiliation, you will be sent an Initial Visit School Description report template to complete. If your school or program is not deemed eligible for affiliation, the application fee will be refunded.

Please send two hard copies and three CDs of the completed form. Include one additional hard copy of any information that is not available on the CDs.

**Deadlines:** Initial Visit School Description reports must be received no later than September 30 for fall visits and no later than December 31 for spring visits.

**Step 3. Initial Visit Fee Invoice**

An Initial Visit will be scheduled and you will be invoiced a \$600.00 Initial Visit fee. Please visit our website or contact the WASC office for further fee information.

**Step 4. On-site Initial Visit**

A Visiting Committee will be sent to your facility to review the information contained in the Initial Visit School Description report and to gather additional information. A mutually acceptable date for the visit will be selected by the school and the Chairperson of the Visiting Committee.

**Step 5. Commission Action**

The Visiting Committee will provide a report and recommendation to the WASC Commission. The Commission will make a final determination whether to grant Initial Accreditation, Candidacy for Accreditation, or to deny WASC affiliation.

**Step 6. Notification**

You will be notified in writing of the Commission's action and you will receive a copy of the Visiting Committee report. The Commission meets at the end of January, April, and June.

Northern Office: 533 Airport Boulevard, Suite 200, Burlingame, CA 94010 Phone: (650) 696-1060 Fax: (650) 696-1867  
Southern Office: 43517 Ridge Park Drive, Suite 100, Torrance, CA 90500 Phone: (951) 693-2550 Fax: (951) 693-2551  
mail@acswasc.org • www.acswasc.org

Below is the timeline in operation at the two schools currently in the process, it provides a template for this proposed school which will embark upon the process in its first year of operation:

8/27 Review WASC Initial Visit School Description w/ Teams and clarify roles

9/3 - Contact WASC to ensure application has been received

9/29 – Meeting with Jackie and send update to leaders.



11/1: WASC 1st draft from JE

11/1 – 11/15: Collect data based on written report (JE, EV, HO, Site Leaders)

11/1 - 11/15: WASC 2nd draft due from JE & EV to sites

11/15 – 12/3: WASC Initial Visit School Description – teachers and SAC review and provide questions / feedback

12/3 - 12/17: WASC Initial Visit School Description – complete final by JE

12/17: Send 2 hard copies and 3 CD's to WASC – EV

Note that the main points of contact – JE and EV – represent the PUC CEO and the Regional Director. This enables the school site-based instructional leader (principal) to focus on the students and teachers and ensure the primary tasks related to teaching and learning are not disrupted by the WASC accreditation process. On the contrary, the reflection and teacher involvement in WASC coincide with our emphasis on collaboration, data driven instruction, and reflective teaching practices. Thus the burdensome aspect of the process (editing, writing, and other paperwork) is supported by the CEO and Regional Director, while teacher reflection and sharing of best practices, creation of scope and sequences, etc. – all part of daily life at a PUC school – can take place and be incorporated into the WASC process.

## BELL SCHEDULE

<b>Grade 9</b> [60 credits]	<b>Grade 10</b> [60 credits]	<b>Grade 11</b> [60 credits]	<b>Grade 12</b> [60 credits]
<b><u>Period 1:</u></b> <b>8:20 – 9:05</b>  (b) English 9 (10)	<b><u>Period 1:</u></b> <b>8:20 – 9:05</b>  (a) World History (10)	<b><u>Period 1:</u></b> <b>8:20 – 9:05</b>  (a) U.S. History (10)	<b><u>Period 1:</u></b> <b>8:20 – 9:05</b>  (g) American Government (sem.) (5) & Economics (sem.) (5)
<b><u>Period 2:</u></b> <b>9:30 – 10:30</b>  (c) Algebra 1 (10) or (c) Algebra 2	<b><u>Period 2:</u></b> <b>9:30 – 10:30</b>  (b) English 10 (10)	<b><u>Period 2:</u></b> <b>9:30 – 10:30</b>  (b) American Literature (10)	<b><u>Period 2:</u></b> <b>9:30 – 10:30</b>  (b) English Language and Composition (10)
<b><u>Break:</u></b> <b>10:30 – 10:45</b>	<b><u>Break:</u></b> <b>10:30 – 10:45</b>	<b><u>Break:</u></b> <b>10:30 – 10:45</b>	<b><u>Break:</u></b> <b>10:30 – 10:45</b>
<b><u>Period 3:</u></b> <b>10:50 – 11:50</b>  (d) Biology (10)	<b><u>Period 3:</u></b> <b>10:50 – 11:50</b>  (c) Algebra 2 (10) or (c) Geometry	<b><u>Period 3:</u></b> <b>10:50 – 11:50</b>  (c) Algebra 2 (10) or (c) Pre-Calculus or (c) Geometry	<b><u>Period 3:</u></b> <b>10:50 – 11:50</b>  (g) Pre-Calculus (10)  <i>or Other Elective</i>
<b><u>Period 4:</u></b> <b>11:55 – 12:55</b> (f) Music, Dance, Drama, or Art (10)	<b><u>Period 4:</u></b> <b>11:55 – 12:55</b>  (d) Anatomy & Physiology (10)	<b><u>Period 4:</u></b> <b>11:55 – 12:55</b>  (d) Chemistry (10)	<b><u>Period 4:</u></b> <b>11:55 – 12:55</b>  (g) AP Environmental (10) OR (g) AP Physics (10) OR Elective (10)
<b>LUNCH</b> <b>12:55 – 1:40</b>	<b>LUNCH</b> <b>12:55 – 1:40</b>	<b>LUNCH</b> <b>12:55 – 1:40</b>	<b>LUNCH</b> <b>12:55 – 1:40</b>
<b><u>Period 5:</u></b> <b>1:45 – 2:45</b>  Math Support Elective: (10)	<b><u>Period 5:</u></b> <b>1:45 – 2:45</b>  (e) Spanish 1 (10)	<b><u>Period 5:</u></b> <b>1:45 – 2:45</b>  (e) AP Spanish Lang (10)  <i>OR Elective</i>	<b><u>Period 5:</u></b> <b>1:45 – 2:45</b>  (g) AP Spanish Lit (10)  <i>OR Elective</i>
<b><u>Period 6:</u></b> <b>2:50 – 3:50</b>  ELA Support Elective : (10)	<b><u>Period 6:</u></b> <b>2:50 – 3:50</b>  CAHSEE Prep (10)	<b><u>Period 6:</u></b> <b>2:50 – 3:50</b>  ACT/SAT Prep (10)	<b><u>Period 6:</u></b> <b>2:50 – 3:50</b>  Physical Education (10)

## TOTAL DAYS OF INSTRUCTION

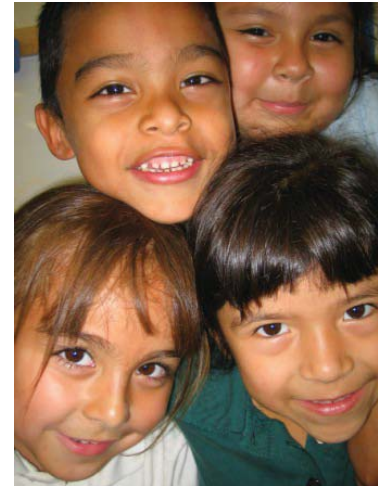
**\*\* LH = LEGAL HOLIDAY**  
**\*\* PD = PROFESSIONAL DEVELOPMENT / Pupil Free Day**  
**-MD = MINIMUM DAY**

<i>Professional Development Dates</i>
9/6/11
10/21/11
11/10/11
12/9/11
12/16/11
1/30/12
3/16/12
3/19/12
3/29/12
3/30/12



Partnerships to Uplift Communities

**P U C**  
**SCHOOLS**



## General Policies & Guidelines

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# Educational Model

## MISSION STATEMENT

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*“Our mission is to ensure every student graduates from high school prepared for college success.”*

## CORE VALUE

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We are a community dedicated to closing the achievement gap for our students. We are accountable, to our students and their parents, for results. We commit to our work with a **SENSE of URGENCY**.

## SCHOOL DESIGN PRINCIPLES

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The PUC Schools design principles serve as our “road map” to create schools that demonstrate high levels of success in accomplishing the dual agenda of *supporting* and graduating academically struggling students while preparing all students to college-ready standards. These design principles are based on the work of Donna Rodrigues, a reformer and accomplished educational leader, at University Park Campus School in Worcester, Massachusetts. The principles were honored and put into practice at the University Park Campus School, a school that has consistently demonstrated the capacity to achieve college-readiness for all its students, regardless of their initial ability levels.

PUC Schools is privileged to adopt and adapt these design principles in order to fulfill our mission with a sense of urgency.

### **Design Area 1: Academic Program**

*An Untracked Academic Program that prepares Every Student for College Work*

- 1) Honors-level program of study for all
- 2) Standards-based curriculum that holds all students to high expectations
- 3) Engaging instruction that emphasizes learning through inquiry
- 4) Academic catch-up program combining basic skills with advanced concepts
- 5) Differentiated instruction that meets the learning needs of each student
- 6) Immersion for English language learners and inclusion for special education students
- 7) School-wide literacy program across the curriculum
- 8) Daily schedule and yearly calendar structured to extend learning opportunities
- 9) Scaffolded exposure to college-level instruction and college courses



**Design Area 2: School Culture**

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*A School Culture that Won't Allow Any Student to Fail*

- 1) Clear student behavioral norms based on professional norms
- 2) Formal induction and mentoring of new students
- 3) Faculty commitment to "break down" complex material
- 4) Multiple modes of academic support
- 5) Consistent adult modeling of core values
- 6) Faculty commitment to motivate and inspire students
- 7) Construction of peer culture that supports each other's success
- 8) Family involvement that supports student success
- 9) University partnership that reinforces college-going culture

**Design Area 3: Organizational Practices**

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*Formal Organizational Practices that Support the Academic Program and School Culture*

- 1) Data-driven approach to curriculum, instruction, and school design
- 2) Hiring and development of faculty with skills and values to fulfill school mission
- 3) Shared leadership and collective decision-making
- 4) Student role in shaping school direction
- 5) Use of external standards to prevent erosion of internal standards
- 6) Development of common tools to ensure consistent academic expectations
- 7) Multi-faceted staff development that continuously improves teaching quality
- 8) Use of school-wide literacy program to focus staff on achieving school mission
- 9) Formal organizational arrangements that maximize university partnership
- 10) Deployment of staff and other resources in flexible and creative ways
- 11) Leader who serves as "keeper of the flame" reinforcing mission and culture

# Contact Information

Jacqueline Elliot, Ed.D., Co-Founder and Chief Executive Officer  
Ref Rodriguez, Ed.D., Co-Founder

## Elementary School

Milagro Charter School  
1855 North Main Street  
Los Angeles, CA 90031

323-223-1786 Phone  
323-223-8593 Fax  
Sascha Robinett, M.A., Principal  
Martha Moran, Operations Leader

## Middle Schools

Community Charter Middle School  
11500 Eldridge Ave  
Lakeview Terrace, CA 91342

818-485-0933 Phone  
818-485-0940 Fax  
Ron Alatorre, Ed.D., Principal  
Max Valadez, Operations Leader

CALS Charter Middle School  
7350 N. Figueroa Street  
Los Angeles, CA 90041

323-254-4427 Phone  
323-254-4099 Fax  
Nancy Villagomez, Principal

Lakeview Charter Academy  
11465 Kagel Canyon Street  
Lakeview Terrace, CA 91342

818-485-0340 Phone  
818-485-0341 Fax  
Manuel Ponce, Principal  
James Pasto, Operations Leader

Excel Charter Academy  
1855 North Main Street  
Los Angeles, CA 90031

323-222-5010 Phone  
323-222-5148 Fax  
Suzanne Edwards-Acton, Operations Leader  
Andres Versage, Instructional Leader

Triumph Charter Academy  
919 Eighth Street  
San Fernando, CA 91340

818-837-6221 Phone  
818-837-6222 Fax  
Lonnie Yansurak, Principal  
Karman Mak, Instructional Leader

Santa Rosa Charter Academy  
7350 N. Figueroa Street  
Los Angeles, CA 90041

323-254-1703 Phone  
323-254-0958 Fax  
Ingrid Anderson, M.A., Principal

Nueva Esperanza Charter Academy  
1445 Celis Street  
San Fernando, CA 91340

818-256-1951 Phone  
818-256-2397 Fax  
Jonathan Stewart, Principal  
Adriana Abich, Assistant Principal

## High Schools

CALS Early College High School  
700 Wilshire Blvd., 4<sup>th</sup> Floor  
Los Angeles, CA 90017

213-239-0063 Phone  
213-239-9008 Fax  
Connie Rivas, Principal  
Mara Simmons, Ph.D., Instructional Leader

Community Charter Early College High School  
11500 Eldridge Ave  
Lakeview Terrace, CA 91342

818-485-0951 Phone  
818-485-0952 Fax  
Brian Wagner Ed.D., Principal  
Jennifer Reyes, Ed.D., Instructional Leader

Lakeview Charter High School  
14019 Sayre St.  
Sylmar, CA 91342

818-559-7699 Phone  
818-559-8641 Fax  
Jonathan Erickson, Principal

Triumph Charter High School  
14019 Sayre St.  
Sylmar, CA 91342

818-559-7699 Phone  
818-559-8641 Fax  
Lori Rosales, Principal

PUC Schools Home Office  
111 North First Street, Suite 100 Burbank, CA 91502  
818.559.7699 Phone    818.559.8641 Fax    [www.pucschools.org](http://www.pucschools.org)

# Expectations

## GENERAL CONDUCT

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1. Students shall show by their conduct consideration for the rights and privileges of others and will demonstrate cooperation with all members of the school community.
2. Students shall evidence respect for constituted authority by following rules and regulations of the school, by attending regularly, and by complying with those provisions of civil and criminal law that apply to the conduct of juveniles or minors.
3. Students should assume the responsibility for diligent work in order to profit from the educational experiences provided.
4. Students shall be helped in all ways possible to enable them to take advantage of their educational activities.
5. Partnerships with parents, community organizations, and institutions of higher education will contribute to the achievement of our students.

# Areas of Responsibility

## PARENT OR GUARDIAN

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The Parent/Guardian Shall:

1. adhere to existing policies governing the conduct and education of their children.
2. comply with Compulsory Education Laws which state that:
  - a. A person between the ages of 6 and 16 years, not exempted, is subject to compulsory full-time education.
  - b. A person between the ages of 16 and 18 years shall attend school in an approved program unless he/she has received a high school diploma or its equivalent.
3. be liable for any misconduct resulting in injury or death to any student, or to any persons employed by or volunteering for the school.
4. be liable for any defacement or injury to any real or personal property belonging to the school.
5. be liable for all property belonging to the school which is loaned to the student and not returned upon demand of an employee of the school.
6. ensure compliance with policies regarding bicycle and automobile and pedestrian regulations in the vicinity of and on school property.

## STUDENTS

---

The student shall:

1. attend school punctually and regularly;
2. conform to the regulations of the school;
3. obey promptly all the directions of his/her teacher and others in authority;
4. observe good order and propriety of deportment;
5. be diligent in study;
6. be respectful to his/her teacher and others in authority;
7. be kind and courteous to schoolmates;
8. refrain entirely from the use of profane and vulgar language.
9. comply with all safety rules and regulations (e.g. use of bicycle helmets).

## **SCHOOL ADMINISTRATORS**

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The School Administrator shall:

1. initiate and enforce a set of school rules to facilitate and promote positive attitudes and habits of good citizenship.
2. communicate the rules of student discipline to all students at the time of their enrollment.
3. support the classroom teacher in his/her efforts to promote improved and acceptable behavior of students.
4. notify parents/guardians of student, by telephone, letter or in person, of offenses as needed.
5. maintain documented records of student behavior as a means of helping in the guidance of the students, as a record for parental conferences, as reference for authorized agencies and for supporting evidence where suspension or expulsion may become necessary.
6. cooperate with law enforcement personnel.
7. always remain cognizant of his legal and professional responsibilities to the school and to the students.
8. be responsible for the administration, management, instructional program, and operation of the school.

## **TEACHERS**

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The Teacher shall:

1. conduct a well-planned and effective classroom program.
2. initiate and enforce a set of classroom regulations that facilitate effective learning.
3. cooperate with administrators and other classroom teachers in enforcing general school rules and appropriate campus behavior.
4. follow procedures outlined in each school's handbook in handling discipline problems for which he/she is directly responsible.
5. make prompt referrals when a student's conduct and record indicate that additional supports are needed.
6. remove any student whose behavior seriously disrupts the learning atmosphere of the class, and cooperate with the administrator in his/her effort to promote improved and acceptable behavior of students.



# Disciplinary Policies

We recognize that each student is an individual and that control and correction of student misconduct must be handled on an individual basis. The following procedures may be used for disciplinary purposes by the school administration. Please review and be familiar with the school wide disciplinary procedures for your child's school.

## Conferences

Misconduct indicates the need for a comprehensive look at the student's behavior to determine possible causes and probable corrective measures. Conferences may involve some or all of the following people: students, teachers, psychologists, counselors, attendance officers, school administrators, and parents.

## Family Support / Student Study Teams

Misconduct of a continuing nature indicates the need for a comprehensive look at the student's behavior to determine possible causes and probable corrective measures. The Student Study Team which may include some or all of the following people: student, teachers, psychologist, counselors, attendance officer, school administrator, and parents will review the student's behavior, develop and monitor a plan for assistance.

## Behavioral Contract

A behavioral contract may be written before or after disciplinary action for any act of misconduct, including non-diligence in studies. Parents will be provided with a copy of the contract when this action is taken.

The school encourages the use of performance contracts, whereby student/school-determined goals in academic/behavior areas are specifically and expressly stated. The student is held accountable for the achievement of these mutually agreed upon goals.

## Removal From Class

A student who creates a safety hazard in class or commits severe disruptive infractions in class may be administratively removed from that class.

## Probation

A student may be placed on probation before or after disciplinary action for any act of misconduct, including non-diligence in studies. Parents will be notified in writing when this action is taken.

## Exclusion

The school may exclude from attendance on regular school classes any child whose physical or mental disability is such as to cause his attendance to be detrimental to the welfare of other students such as:

- when a student displays filthy or vicious habits.
- when a student has a contagious or infectious disease.
- for lack of proper immunization for up to five (5) days.
- when a principal determines that the continued presence of the child would constitute a clear and present danger to the life, safety, or health of pupils or school personnel.

# SUSPENSION

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## Grounds for Suspension

A student may be suspended or expelled for any of the acts enumerated in this section and related to school activity or school attendance that occur at any time, including, but not limited to, any of the following:

1. While on school grounds.
2. While going to or coming from school.
3. During the lunch period whether on or off the campus.
4. During, or while going to or coming from, a school-sponsored activity.
5. Students who habitually fail to comply with these policies and/or who present an immediate threat to the health and safety of others may also be suspended or expelled.

A pupil may be suspended from school by the principal or administrative designee of the school in which the pupil is enrolled, if it is determined that the pupil:

- a. (1) Caused, attempted to cause, or threatened to cause physical injury to another person or (2) willfully used force or violence against another person, except in self defense.
- b. Possessed, sold or otherwise furnished any firearm, knife, explosive, or other dangerous object.
- c. Is under the influence of any controlled substance, an alcoholic beverage, or an intoxicant of any kind.
- d. Unlawfully offered, arranged, or negotiated to sell any substance, including an alcoholic beverage, or an intoxicant of any kind and then either sold, delivered, or otherwise furnished to any person another liquid, substance or material and represented the liquid, substance, or material as a controlled substance, alcoholic beverage, or intoxicant.
- e. Committed or attempted to commit robbery or extortion.
- f. Caused or attempted to cause damage, including tagging and graffiti, to school property or private property. As used in this section, school property includes, but is not limited to, electronic files and databases.
- g. Attempted to steal or stole school property or private property. As used in this section, school property includes, but is not limited to electronic files and databases.
- h. Possessed or used tobacco, or any products containing tobacco.
- i. Committed an obscene act or engaged in habitual profanity or vulgarity.
- j. Unlawfully possessed, offered, arranged, or negotiated to sell any drug paraphernalia.
- k. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties.
- l. Knowingly received stolen school property or private property.
- m. Possessed an imitation firearm, which is defined as a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- n. Committed or attempted to commit a sexual assault, or committed a sexual battery.

- o. Harassed, threatened or intimidated a pupil who is complaining witness or eyewitness in a school disciplinary proceeding for the purpose of either preventing that pupil from being a witness or retaliating against that pupil for being a witness or both.
- p. Engaged in, or attempted to engage in, hazing.
- q. Committed sexual harassment sufficiently severe or pervasive to have negative impact on the victim's academic performance, or to create an intimidating, hostile, or offensive educational environment. (This section does not apply to students in kindergarten through third grade.)
- r. A pupil who aids or abets, as defined in the infliction or attempted infliction of physical injury to another person.
- s. Caused, attempted to cause, threatened to cause, or participated in an act of hate violence.
- t. Intentionally engaged in harassment, threats, or intimidation, directed against school personnel or pupils.
- u. Made terrorist threats against school officials or school property, or both.

## EXPULSION

---

"Expulsion" means removal of the pupil from (1) the immediate supervision and control, or (2) the general supervision of school personnel as those terms are used in E.C. 46300 and 48925.

### Recommendation for Expulsion

Students may be immediately recommended for expulsion from a PUC School for any of the following reasons pursuant to the standards established by the State Department of Education Code under Section 48915 and outlined below:

1. Causing serious physical injury to another person.
2. Possession of any firearm, knife, explosive, or other dangerous object.
3. Unlawful possession of any controlled substance listed in Chapter 2 of Division 10 of the Health and Safety Code, an alcoholic beverage, or an intoxicant of any kind.
4. Robbery or extortion.
5. Harassment, assault or battery upon any student or school employee.

### **Expulsion Procedures**

1. Pupils recommended for expulsion are entitled to a hearing to determine whether the pupil should be expelled. Unless postponed for good cause, the hearing shall be held within 30 school days after the principal determines that the pupil has committed an expellable offense. The school will be responsible for providing the student with appropriate educational opportunities, while the student is on suspension and awaiting an expulsion hearing.
2. The expulsion hearing will be presided over by the Board of Trustees or designees. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three (3) days prior to the hearing.

3. Written notice of the hearing shall be forwarded to the pupil and the pupil's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include the following:
  - a) The date and place of the expulsion hearing
  - b) A statement of the specific facts, charges, and offenses upon which the proposed expulsion is based
  - c) A copy of disciplinary rules which relate to the alleged violation
  - d) Notification of the pupil's or parent/guardian's obligation to provide information about the pupil's status at the school to any other school district or school to which the pupil seeks enrollment.
  - e) The opportunity for the pupil or the pupil's parent/guardian to appear in person or to employ and be represented by counsel or an advocate.
  - f) The right to inspect and obtain copies of all documents to be used at the hearing.
  - g) The opportunity to confront and question all witnesses who testify at the hearing.
  - h) The opportunity to question all evidence presented and to present oral and documentary evidence on the pupil's behalf including witnesses.

### **Record of Hearing**

A record of hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

### **Presentation of Evidence**

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation to expel must be supported by substantial evidence that the pupil committed the expellable offense.

Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay, and sworn declarations may be admitted as testimony from witnesses of whom the PUC Board of Trustees or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his/her testimony heard in a session closed to the public.

The final decision shall be made within ten (10) school days following the conclusion of the hearing.

### **Written Notice Of Expulsion**

The principal, following a decision to expel shall send written notice of expulsion, including the findings of fact, to the pupil or parent/guardian. This notice shall include the following:

- a) Notice of the specific offense committed by the pupil;
- b) Notice that the pupil may have a right to appeal the expulsion to the County Board of Education and the date and process by which an appeal may be filed.
- c) Notice of the pupil's or parent/guardian's obligation to inform any new district in which the pupil seeks to enroll of the pupil's status with the school.
- d) Effective date of expulsion.
- e) Date that the student may be reviewed for readmission.

The principal shall send written notice of the decision to expel to the pupil's district of residence, the Chartering District (LAUSD) and the County Office of Education. This notice shall include the following:

- a) The pupil's name;
- b) The specific expellable offense committed by the pupil;
- c) Disciplinary Records.

## GUIDELINES FOR ADMINISTERING DISCIPLINE TO STUDENTS WHO HAVE VIOLATED STANDARDS OF STUDENT BEHAVIOR

Standards of student behavior shall be enforced at the discretion of the administration within the general guidelines as set forth below.

These guidelines reflect a spectrum of possible actions that shall be appropriate for a specific violation of law or district/school regulations. Within the minimum to maximum actions indicated in the guidelines, the administration shall determine the most effective action based upon knowledge of the facts of the incident and the concept of progressive discipline as an appropriate educational experience.

The listing of minimum and maximum actions does not imply or require that a "step-by-step" progression of increasing severity be employed by an administrator in dealing with a violation. Disciplinary action shall be dependent upon the situation and the previous behavior record of the student. Please refer to your child's school's specific disciplinary procedures.

The following actions are possible with an infraction of a regulation:

1. Conference regarding violation and a warning.
2. In-school probation or suspension from a specific class and/or activity.
3. Detention (or volunteer service in lieu of detention) ++
4. Parent conference
5. Parent/teacher conference
6. Suspension
7. Expulsion

The following represents samples of violations that may occur in the school. The asterisk(\*) indicates mandatory immediate Law Enforcement Agency notification. The double asterisk (\*\*) indicates that recommendation for expulsion is required under Education Code 48915 under certain circumstances. The number in the area of Disciplinary Action refers to the schedule of actions listed above.

		<b><u>Recommended Disciplinary Action</u></b>	
		<b>Minimum Action</b>	<b>Maximum Action</b>
A.	(1) Caused, attempted to cause, or threatened to cause physical injury to another person, or (2) Willfully used force or violence on the person of another, except in self defense.	6	7
*B.	Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object.	6	7**
*C.	Unlawfully posses, used, sold, or otherwise furnished, or been under the influence of, any controlled substance, Alcoholic beverage, or an intoxicant of any kind.	6	7**

*D.	Unlawfully offered, arranged, or negotiated To sell any substance, as listed Chapter 2 Commencing with Section 11053 of Division 10 of the Health & Safety Code, an alcoholic Beverage, or an intoxicant of any kind and Then either sold, delivered, or otherwise Furnished to any person another liquid, Substance or material and represented the Liquid, substance, or material as a controlled Substance.	6	7**
*E.	Committed or attempted to commit robbery Or extortion.	6	7**
F.	Caused or attempted to cause damage to school Property or private property. As used in this Section, school property includes, but is not Limited to, electronic files and databases	6	7
G.	Stolen or attempted to steal school property: As used in this section, school property Includes, but is not limited to electronic Files and databases	4	6
H.	Possessed or used tobacco, or any products containing tobacco.	4	6
I.	Committed an obscene act or engaged in Habitual profanity or vulgarity	1	6
K.	Disrupted school activities or otherwise Willfully defied the valid authority of Supervisors, teachers, administrators, School officials, or other school Personnel engaged in the performance Of their duties	1	6
L.	Knowingly received stolen school property or Private property. Threatening language to a Staff member	1	6
M.	Possessed an imitation firearm, which is Defined as a replica of a firearm that is so Substantially similar in physical properties To an existing firearm as to lead a reasonable Person to conclude that the replica is a firearm	5	6
N.	Committed or attempted to commit a sexual assault	5	7**
O.	Harassed, threatened or intimidated a pupil Who is a complaining witness or eyewitness In a school disciplinary proceeding for the Purpose of either preventing that pupil from Being a witness or retaliating against that pupil For being a witness or both	5	6



Q.	Engaged in, or attempted to engage in hazing as Defined in E.C. Section 32050	5	6
R.	Committed sexual harassment sufficiently Severe or pervasive to have negative impact On the victim's academic performance, or To create an intimidating, hostile, or offensive Educational environment (This section does Not apply to students in kindergarten through Third grade).	5	6
S.	A pupil who aids or abets, as defined in Section 31 Of the Penal Code, the infliction or attempted Infliction of physical injury to another person	5	6
T.	Caused, attempted to cause, threatened to cause Or participated in an act of hate violence as Defined in subdivision (e) of Section 33032.5 (E.C. 48900.3) (This section does not apply to Students in kindergarten through third grade)	5	6
U.	Intentionally engaged in harassment, threats Or intimidation, directed against school District personnel or pupils, that is Sufficiently severe or pervasive to have the Actual and reasonable expected affect of Materially disrupting class work, creating Substantial disorder, and invading the Rights of either school district personnel or Pupils by creating an intimidating or hostile Educational environment.	5	6
V.	Made a terrorist threat against school officials Or property, or both	5	6

#### Truancy

Any pupil subject to compulsory full-time education or to compulsory continuation education who is absent from school without valid excuse three (3) days in one school year or tardy without valid excuse in excess of 30 minutes on each of more than three days in one school year is truant and shall be reported to the attendance supervisor or the Executive Director of the school district.

Upon a pupil's initial classification as a truant, the school shall notify the student's parent or guardian, by first-class mail or other reasonable means, of the following:

1. That the pupil is a truant;
2. That a parent or guardian is obligated to compel the attendance of the pupil at school;
3. That parents or guardians who fail to meet this obligation may be guilty of an infraction and subject to prosecution.
4. That the parent or guardian has the right to meet with appropriate school personnel and/or the School Attendance Review Board (SARB) to discuss solutions to the pupil's truancy;
5. That the pupil may be subject to prosecution;
6. That it is recommended that the parent or guardian accompany the pupil to School and attend classes with the pupil for one day.

# Co-Curricular Policies

## ATTIRE AND GROOMING

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### Attire and Grooming Policy

The dress and grooming of students shall not interfere with the instructional program or create a health or safety hazard. All schools within the PUC network require students to wear uniforms. Each school will clearly communicate with parents and students its school uniform policy in writing.

A pupil who goes to school without proper attention having been given to personal cleanliness, neatness of dress, or uniform policy may be sent home to be properly prepared for school, or shall be required to prepare him/herself for the schoolroom before entering.

### Attire and Grooming Regulations

The school's uniform policy will adhere to the following guidelines.

1. The appearance of students or attire worn by students, disruptive to the educational process will be grounds for exclusion from classes. This provision shall include, but not be limited to, wearing of a color, style, or item of clothing, a particular hair style or jewelry, and symbols of identification associated with organizations not connected to or sponsored by the school.
2. Students shall not be permitted to wear attire which names, advertise, or promotes products that are illegal for minors, including items related to drugs, alcohol, and tobacco.
3. Students shall not be permitted to wear attire which features offensive and/or vulgar words, pictures, or drawings, including naming advertising, or promoting sexually related products or activities.
4. Students shall not be permitted to wear attire which includes words, phrases, or pictures that are derogatory regarding a person's ethnic background, national origin, religious beliefs, gender, or disability.
5. Students shall not be permitted to wear attire which is unduly revealing, or attire which distracts from the educational mission of the school.
6. For reasons of safety, students will not be permitted to attend in bare feet and must wear shoes or sandals.

The principal and staff of each school may establish reasonable additional regulations regarding student appearance and attire to be required of students who voluntarily engage in extracurricular or other special school activities

## PARTICIPATION IN CO-CURRICULAR ACTIVITIES

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### Student Grade Point Requirement

A “C” grade point average is the minimum required for participation in co-curricular activities with the following contingencies:

1. The grade point average is to be based upon the previous grading period and will include grades in all classes completed. A student must pass at least four (4) classes in the previous quarter to be eligible regardless of GPA.
2. Special Education students will be eligible if they are making satisfactory progress in their Individual Education Program (IEP) as determined by the school administration and teachers.
3. For eighth grade students interested in qualifying for high school co-curricular activities, the requirements of this policy shall apply to the eighth grade spring semester grades.

## BICYCLE RULES

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1. A student may not bring his/her bicycle to school before the third grade.
2. For safety: The bicycle must be walked on and off campus.
3. For security: The bicycle must be locked while on campus.
4. A student under the age of 18 must wear a bicycle helmet.

## BUS CONDUCT

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***Note: Rules related to the kind of bus service that is utilized or available at a school site is specific to each particular school site, the following is PUC Schools general policies on bus conduct.***

### School Bus Conduct Policy

Pupils transported in a school bus shall be under the authority of and responsible directly to, the driver of the bus, and the driver shall be held responsible for the orderly conduct of the pupils while they are on the bus or being escorted across a street, highway or road. Continued disorderly conduct or persistent refusal to submit to the authority of the driver shall be sufficient reason for a student to be denied transportation.

For continued disorderly conduct or persistent refusal to submit to his/her authority, a bus driver may deny transportation to pupils not to exceed three (3) days. Each case of pupil discipline by the driver shall be subject to review and modification by the principal or principal's designee who shall have authority to affirm, increase or decrease the length of time transportation may be denied.

### Bus Conduct Rules

1. Students must follow the directions of the bus driver.
2. Students shall not misbehave at bus stops.
3. Students are not permitted to enter a bus unless the driver is present.
5. Students shall enter and leave the bus in an orderly manner.
6. Students shall remain seated while the bus is in motion.
7. Students shall sit facing the front of the bus.
8. Students are required to share their seats with other students.
9. Students shall not put any part of their bodies outside of a bus window.
10. Students shall not use vulgar or profane language on the bus.
11. Students shall not engage in fighting or boisterous conduct, create unnecessary noise or commotion, or shoot or throw things while on the bus.
12. Students shall not eat on the bus.
13. Students shall not smoke or light matches on the bus.
14. Items which may jeopardize the safety of any person shall not be permitted on the bus.
15. No animals (except seeing eye dogs) shall be transported on a school bus. (Title 5, Section 14252)
16. Students shall not be permitted on buses wearing athletic footwear equipped with cleats or spikes.
17. Students must not leave debris of any kind on the bus.
18. Students must not tamper with the bus or bus equipment.
19. Students shall not cross a street or highway at the rear of the bus.

## **ACCESS TO THE INTERNET**

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Electronic communication provides access to vast and diverse resources. Through Local Area Networks (LANs), Wide Area Networks (WAN), and the internet, staff and students have access to individuals, groups, data and materials from all over the world. It is understood that much of the material available through electronic communication has no direct educational value for students, and some of the material available is not suitable at all for students. It is also understood that the school cannot completely control the content of the materials on a global network, nor can it fully protect students who misuse resources to electronically access materials.

Access to a LAN, WAN, or the Internet is a privilege, not a right.

To assure the appropriate use of resources for electronic communication, the following requirements shall apply to all staff and students.

1. All use must be in support of the educational mission, goals objectives, and/or curriculum grade level content standards adopted by the organization.
2. All use must be consistent with the rules of any network being accessed.
3. Unauthorized use of copyrighted materials is prohibited.
4. Distribution of material protected by trade secret is prohibited.
5. Threatening or obscene material is prohibited.
6. Use for commercial activities is prohibited.
7. Use for product advertisement or political lobbying is prohibited.
8. All staff and students using the LAN, WAN or Internet access shall sign an Acceptable Use Agreement acknowledging their agreement to abide by this Policy and any related regulations.

9. Violations of this policy will result in appropriate disciplinary action which may include loss of access, the full range of disciplinary consequences allowed by the Education Code, and criminal prosecution.

## **ELECTRONIC SIGNALING DEVICES**

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PUC Schools acknowledges that there are legitimate reasons for students to possess and use electronic signaling devices such as cellular phones and pagers while going to and from school, and before and after school related activities. However, electronic signaling devices will not be permitted to disrupt instruction, instructional programs, and/or school related activities. Therefore, the following regulation shall apply to the possession and use of electronic signaling devices.

1. Electronic signaling devices may not be used at any time that the use of the device would be disruptive to any instruction, instructional program, and/or school related activity.
2. Electronic signaling devices must be completely turned off during all classes.
3. The school assumes no responsibility for the protection, loss, or damage to any electronic signaling device.

# Promotion and Graduation

## PROMOTION POLICY

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### High School

A student must receive at least 50 credits to be promoted to the next grade. Students are allowed to make up 10 credits during summer school. Students who need to make up more than 10 credits may not be promoted. For any A-G courses, the make up class must be the same class that was failed. Students who fail non A-G elective classes will be allowed to choose another class, with the approval of the school principal, as long as it is of equal credit value.

### Middle School

In order to be promoted to the next grade level, a student must pass all courses, with a grade of D or better, in which he or she is enrolled, as evidenced on the final report card. Students who fail courses must enroll in an equivalent course in summer school (as deemed appropriate by the school principal) and present evidence of having passed the approved course(s) at the onset of the next school year. No middle school student will be promoted to the next grade level if he or she has failed more than two courses as evidenced in the final report card.

## PARTICIPATION IN GRADUATION EXERCISES AND PROMOTIONAL ACTIVITIES

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### High School

In order to graduate from a PUC Schools high school, a student must have:

1. earned a total of 220 credits with a passing grade of D or better. Beginning with the Class of 2009, a letter grade of D will not count as passing towards earning credits for a PUC High School in courses that qualify for the California A-G requirements. The A-G courses are required for graduation from a PUC School and for admission to the UC and CSU systems.

In order to participate in the graduation ceremonies of a PUC Schools high school, a student must have:

1. earned a minimum of 210 credits. These students must take summer courses to make up the additional 10 credits in order to receive their diploma.
2. met any additional requirements set by the school. Seniors may be denied participation in the ceremonies for disciplinary reasons.

The high school site principal will set guidelines for permitting students to participate in Senior Class Activities. Participation in Senior Class Activities is a Privilege not a Right.

### Middle School

In order to graduate from a PUC Schools middle school, a student must have:

1. passed all courses (in grades 6-8) with a grade of D or better.

In order to participate in the graduation ceremony of a PUC Schools middle school, a student must have:

1. met requirements for promotion as specified in the middle schools' promotion policy.
2. met any additional requirements set by the school. 8<sup>th</sup> grade students may be denied participation in the ceremonies and or 8<sup>th</sup> grade activities for disciplinary reasons.

Under no circumstances will a middle school student be allowed to participate in the graduation ceremony if he or she receives a Fail (F) in any class at the final semester report card (or final trimester for CALS Charter Middle School).



# Harassment Policy

## STUDENT GUIDE TO UNDERSTANDING, AVOIDING, AND REPORTING HARRASSMENT

All pupils have the right to participate fully in the educational process, free from discrimination and harassment.

A definition of harassment is the unwanted and unwelcome behavior from other students or staff members which interferes with another individual's life. When it is sexual in nature, then it is considered to be "sexual harassment". When it is racial in nature, then it is considered to be "hate-motivated behavior" or sometimes a "hate crime". Regardless, harassment in the schools or at the workplace is not tolerated at a PUC School. Disciplinary action will be taken promptly against any student engaging in unlawful acts of sexual harassment or hate violence. Examples of actions that interfere with a person's education that are prohibited for both students and staff include:

- |                      |                               |
|----------------------|-------------------------------|
| 1. Unwanted touching | 6. Sexual innuendos           |
| 2. Obscene comments  | 7. Gender specific comments   |
| 3. Physical threats  | 8. Requests for sexual favors |
| 4. Obscene gestures  | 9. Racial-specific comments   |
| 5. Indecent exposure | 10. Suggestive looks          |

### Why is this topic important?

Many people have been called rude or obscene names and maybe even been threatened because of their religion, race or simply because they are a boy or girl. This guide is designed to remind everyone that "harassment" of any kind is not acceptable behavior at any time and is against school rules. "Harassment" is not welcome in our schools!

**WE BELIEVE THAT EVERY STUDENT HAS THE RIGHT TO LEARN**  
**Without being called names and**  
**Without being threatened because they are a boy or girl, or from a certain religion**  
**or race or of a certain sexual orientation.**

### What is "harassment"?

Harassment is unwanted and unwelcome behavior from other students or staff members which interferes with another person's life. When it is sexual in nature, it is "sexual harassment". When it is racial in nature, it is "hate-motivated behavior" or sometimes a "hate crime". It is against the rules for students to make remarks that embarrass others or make them feel uncomfortable because of actions or remarks that are sexual or racial in nature.

### What are some actions that interfere with a person's education and are not allowed?

- |                   |  |
|-------------------|--|
| Unwanted touching | Sexual Innuendos   |
| Obscene comments  | Gender specific comments                                       |
| Physical threats  | Request for sexual favors                                      |
| Obscene gestures  | Racial-specific comments                                       |
| Indecent exposure | Suggestive looks   |
|                   | Derogatory comments referring to a person's sexual orientation |

### What should you do if you feel that you have been harassed?

1. Tell a teacher, counselor, or a school administrator.

When telling what happened, be specific. ANY REPORT YOU MAKE IS PRIVATE. You may bring a parent or guardian with you, if you would like. The information you give is private and will not be made public, unless you

talk about it yourself with others. Any witnesses will be told to keep the information about the situation to themselves, too.

2. Don't worry about someone "getting even" with you for telling

The school will support you and investigate your concern quickly. School administrators will do their best to make sure no one tries to "get even"

3. Tell the truth

Any student who falsely accuses another student or staff member of sexual or racial harassment is subject to disciplinary action.

**What happens next?**

Usually harassment complaints can be settled at the school, but sometimes it will be heard by personnel at the PUC Schools Home Office. An investigator may be assigned and may talk with people who can help sort out the facts. If an investigator is assigned, he or she will determine whether harassment has occurred, prepare a report about the situation and give the information to your principal. Your principal will then suggest a solution or remedy. Finally, if things are not settled, you have the right to submit your concern to the PUC Schools Home Office to the attention of Ms. Jacqueline Elliot or Dr. Ref Rodriguez, Co-CEOs of PUC Schools.

# Nondiscrimination Policy

PUC Schools does not discriminate on the basis of race, color, national origin, sex, sexual orientation, disability, or age in any of its policies, procedures or practices, nor does it tolerate sexual harassment, in compliance with the Americans With Disabilities Act of 1991, Title VI of the Civil Rights Act of 1964 (pertaining to race, color, and national origin), Title IX of the Education Amendments of 1972 (pertaining to sex), Section 504 of the Rehabilitation Act of 1973 (pertaining to handicap) and the Age Discrimination Act of 1975, (pertaining to age).

## **APPENDIX VI**

### **Professional Development Calendars, Detailed Agendas**

The following pages are the exact, detailed agendas used for professional development at PUC high schools, and will be the model for this proposed school. Please note that this Appendix contains documents representing FOUR distinct PD weeks over the summer. The first is for *new* PUC school leaders. The second is for *all* PUC school leaders. The third is for *new* PUC school teachers (of which all in a new school fit in this category). The fourth document represents a full faculty of summer professional development, new and returning teachers together.

This document also includes the PD calendar for one of our high schools, this will provide the model for our proposed school.

## Leadership Institute: Facilitator Notes

Leaders will...

- Build relationships and network with colleagues.
- Reflect on and describe leadership practices to establish and sustain “Foundations for Excellence”
- Reflect on and describe leadership actions that establish and sustain “Key Drivers of Excellence”
- Reflect on and describe practices that “Support Growth Toward Excellence” at a PUC school
- Reflect on and describe “Systems for Excellence” at a PUC school.
- Describe programs and supports that build a “Culture of Excellence”

# Leadership Institute: Facilitator Notes

Monday August 2, 2010 Foundations for Excellence Instructional Leaders / Operational Leaders CA Endowment: Mojave		
<b>Breakfast</b>		8:00 – 8:30
<b>Welcome &amp; Ice Breaker</b> <i>Jackie Elliot</i>		8:30 – 9:00
<b>Framing Activity:</b> Relentless Pursuit of Excellence to Achieve the “College Ready Promise” <i>Kelly Montes De Oca &amp; Jackie Elliot</i>		9:00 – 10:00
<b>Strategic Leadership:</b> Practices that Achieve Excellence <i>Nik Orlando &amp; Ed Vandenberg</i>		10:00 – 12:30
<b>Lunch</b> ( <i>on own</i> )		12:30– 1:30
<b>Strategic Leadership:</b> Enroll, Develop, and Sustain your SSP <i>Nik Orlando</i>		1:30– 2:30
<b>Strategic Leadership:</b> Establishing and Sustaining the school vision through positive relationships and feedback <i>Malena Otero &amp; Ed Vandenberg</i>		2:30 – 3:45
<b>Strategic Leadership:</b> Communicating and Collaborating <i>Kelly Montes De Oca &amp; Jaime Serrano</i>		3:45 – 4:15
<b>Reflection &amp; Debrief</b> Plus / Delta / Questions / Needs HomeFun: Post school site SSP GO & Read Lemov sections		4:15– 4:30
<b>Bowling @ Pickwick Bowl</b>		5:00 – 7:00

## Leadership Institute: Facilitator Notes

<b>Tuesday August 3, 2010</b> <b>Key Drivers of Excellence</b> Instructional Leaders / Operational Leaders CA Endowment: Mojave 8:00 – 4:30		<b>Tuesday August 3, 2010</b> <b>Foundations for Excellence</b> SBOM / OM River District Campus: Instructional Office 8:00 – 4:30	
<b>Breakfast &amp; Welcome</b> Review feedback Review Agenda	8:00 – 8:30	<b>Breakfast &amp; Welcome</b> <b>Quick ICE Breaker</b> <i>HR Team</i>	8:00 – 8:30
<b>Performance Management as a Driver of Excellence</b> <i>Kelly Montes De Oca &amp; Malena Otero</i> <b>PUC Induction: Alignment to PM</b> <i>Glenda Aleman</i>	8:30 – 12:00	<b>PowerSchool/Data Submissions</b> Calendar and how to do all submissions in a year <i>Jahaira Blanco, Jaime Serrano, and Kennedy Hilario</i>	8:30 – 11:30
<b>Lunch</b>	12:00 – 1:00	<b>Lunch</b>	11:30 – 12:30
<b>Data as a Driver to Achieve and Maintain Excellence</b> <i>Kelly Montes De Oca &amp; Matt Goodlaw</i>	1:00 – 4:00	<b>Customer Service</b> <i>Eddie Torres-Zometa, HR Team, and Matt Luker</i>	12:30-2:30
<b>Reflection &amp; Debrief</b> Plus / Delta / Questions / Needs	4:00 – 4:30	<b>Reflection &amp; Debrief</b> Plus / Delta / Questions / Needs	2:30 – 3:00



## Leadership Institute: Facilitator Notes

Wednesday August 4, 2010 Supporting Growth Toward Excellence Instructional Leaders CA Endowment: Mojave 8:00 – 4:30		Wednesday August 4, 2010 Systems for Excellence Operational Leaders / SBOM / OM River District Campus: Instructional Office 8:00 – 5:00	
<b>Breakfast &amp; Welcome</b> Review feedback Review Agenda <b>Coaching</b> <i>Kelly Montes De Oca</i> Videotaping protocol Video Anchors <b>Lunch</b> <b>Language Acquisition</b> <i>Kelly Montes De Oca</i> <b>Reflection &amp; Debrief</b> Plus / Delta / Questions / Needs	8:00 – 8:30	Breakfast & Welcome Quick ICE Breaker –Nikki	8:00 – 8:30
	8:30 – 12:00	Delineation of Roles Malena HR-give pre-work in order to get IL input	8:30 – 10:30
	12:00 – 1:00	Break	10:30 – 10:45
	1:00 – 4:00	Time Off, Wage & Hour (Scenario) Malena Otero	10:45– 11:15
	4:00 – 4:30	Time Sheets (Scenario) Maylen Naranjo	11:15-11:45
		Mileage Reimbursement Maylen Naranjo& Sarah Hahn Ned OL present	11:45-12:15
		Purchase Order (Scenario) Sarah Hahn	12:15 – 12:45
		Lunch	12:45-1:45
		Check Request (Scenario) Sarah Hahn	1:45 – 2:15
		Fundraising Maylen Naranjo& Sarah Hahn	2:15-2:45
		Break	2:45-3:15
		Lunch Regulation (Scenario) Jackie D	3:15– 3:45
		Approved Vendors (Scenario) Eddie	3:45-4:15
		Attendance (Scenario) Liz/Paola	4:15-4:45

# Leadership Institute: Facilitator Notes

Thursday August 5, 2010  
**Systems for Excellence**  
 Instructional Leaders / Operational Leaders / SBOM / OM  
 CA Endowment: Mojave  
 8:00 – 4:30

<b>Breakfast &amp; Welcome</b> <b>Quick ICE Breaker</b> <i>Nikki Dashti</i>	<b>8:00 – 8:30</b>
<b>PUC Operations Dashboard</b> <i>Kennedy Hilario</i>	<b>8:45 – 9:15</b>
<b>Budget/Fiscal Responsibility (P&amp;L / GL)</b> <i>Kennedy Hilario &amp; Maylen Naranjo</i>	<b>9:15-10:45</b>
<b>Break</b>	<b>10:45 -11:00</b>
<b>Emergency Preparedness</b> <i>Eddie Torres-Zometa</i>	<b>11:00– 12:00</b>
<b>Lunch</b>	<b>12:00 – 1:00</b>
<b>Worker’s Comp/ OSHA</b> <i>HR Team &amp; Eddie Torres-Zometa</i>	<b>1:00– 2:00</b>
<b>IT/HR/Data Policy Manual</b> <i>Jaime Serrano /Malena Otero</i>	<b>2:30 – 3:30</b>
<b>IT Overview</b> <i>Jaime Serrano</i>	<b>3:30-4:00</b>
<b>Reflection &amp; Debrief</b> <b>Review Meeting Schedule for Year Meetings SY10-11</b> <ul style="list-style-type: none"> <li>• 1 Instructional Leadership Course of Study (IL &amp; OL)</li> <li>• 3 Leadership Meetings (IL’s)</li> </ul>	<b>4:00 – 4:30</b>

## Leadership Institute: Facilitator Notes

<ul style="list-style-type: none"> <li>• 1 Leadership Meeting (OL's)</li> <li>• 1 Operations Meeting (OL's &amp; SBOM / OM)</li> <li>• Roll out at Leadership Inst Thursday 8/5</li> </ul> <p>Plus / Delta / Questions / Needs</p>	
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Friday August 6, 2010 <b>Building a Culture of Excellence for All</b> Instructional Leaders / Operational Leaders CA Endowment: Mojave	
<b>Breakfast &amp; Welcome</b> Review feedback Review Agenda	8:00 – 8:30
<b>Defining a Culture of Excellence for Students</b> <i>Kelly Montes De Oca</i>	8:30 – 9:30
<b>Literacy Initiative</b> <i>Lisa Tremain</i>	9:30 – 10:30
<b>SPED: Path to Special Education</b> <i>Kaye Ragland</i>	10:30 – 12:30
<b>Lunch</b>	12:30 – 2:00
<b>Clinical Counseling</b> <i>Christine Sartiaguda</i> <ul style="list-style-type: none"> <li>• Boundaries</li> <li>• Review of Clinical Counseling Program</li> </ul>	2:00 – 3:00

# Leadership Institute: Facilitator Notes

Include 15 minutes for application	
<div> <div>Closing</div> <div>Complete Survey Monkey Evaluation</div> </div>	3:00 – 4:30

## New Leader Institute Agenda

### OUTCOMES

Leaders will...

- Align personal beliefs with what PUC believes.
- Reflect on the importance of aligning beliefs, practices and actions
- Describe how their leadership will support achievement of the 3 Commitments and create a positive school culture.
- Describe how the use of systems thinking will support balanced decision making and preparation.
- Examine the PUC Schools SSP (School Success Plan) and articulate the purpose and components.
- Reflect on beliefs, practices and actions at high performing schools.
- Describe practices for managing and coaching of team members.
- Collaborate with Directors to be introduced to PUC operational practices
- Engage in purpose for Community Circle
- Collaborate with leader mentors

Tuesday July 6, 2010		Wednesday July 7, 2010	
<b>Breakfast &amp; Welcome</b>  <b>Ice Breaker</b> <i>Kelly Montes De Oca</i>  Over breakfast have a conversation about what “Everything Speaks” means to you?  Reflecting on “Everything Speaks,” what do you do in your everyday life that speaks loudly to others about who you are? (or what is important to you)  As we go through the week we will reflect on the implicit and explicit messages we send at our school site and what the learning experiences are saying about PUC.  Notes: Perception comes through <b>Agenda Overview</b> <i>Ed Vandenberg</i>		<b>Breakfast &amp; Introduction to Directors</b> <b>Quick Ice Breaker</b> <i>Malena Otero &amp; HR Team</i>	8:00 – 8:30

## New Leader Institute Agenda

<b>LE 1: Personal &amp; Organizational Alignment</b> <i>Jacqueline Elliot &amp; Ed Vandenberg</i> Break	8:45 – 10:00	<b>HR - Collaborating with the HR team</b> <i>Malena Otero &amp; HR Team</i>	8:30 – 10:00
<b>LE: 2 Guiding Principles for Leaders</b> <i>Nik Orlando</i>	10:00 – 10:10	<b>Finance – Introduction: Budget, Spending, Payroll</b> <i>Maylen Naranjo, Sarah Hahn</i>	10:00 – 11:00
<b>LE 3: Systems Triangle</b> <i>Nik Orlando</i>	10:10 – 11:10	Break	11:00 – 11:15
<b>Lunch w/ Mentor Leaders</b> (On Site – Lunch provided) Introduce Mentor Leaders  Icebreaker: Ask participant to come up with 3 questions they will ask 3 others in the group. Bring everyone back to together; each participant will then be described by their partners.  Karman ---- > Sascha Jonathan E -----> Emilio Lori ----- > Emilio Adriana ---> Jen Jonathan S ---> Manuel Brian --- > Connie Nancy ---->  EV <i>Something about your childhood that prepared you for your current position?</i> <i>What other jobs have you had and how do they relate to your position today?</i> <i>What are you passionate about and why?</i>  Took 1 hour and 10 minutes including lunch. Whip-around; each person who interviewed you chooses 1 thing to share.	11:15 – 12:15	Data Team - <i>Introduction to PS, Data Director, BIG 6</i>	11:15 – 12:15
	12:15 – 1:15	Lunch w/ Directors (brought in)	12:15 – 1:00



## New Leader Institute Agenda

<p><b>LE 4: 3 Commitments &amp; School Success Plan</b>  <i>Nik Orlando</i></p> <p><b><i>Reading in advance</i></b>  <i>Switch, Chip &amp; Dan Heath Chapter 6 “Shrink the Change” p.124 – 148</i></p> <p><b><i>Reading in advance</i></b>  <i>Conditions for Student Success; the Cycle for Continuous Instructional Improvement, Joan Weiss p.1 – 16</i></p>	<p>1:15 – 3:30</p>	<p><b>Operations -Attendance, Food Service, School Safety</b>  <i>Eddie Torres-Zometa, Jackie D, Paola</i></p>	<p>1:00 – 3:00</p>
<p><b>Reflection &amp; Debrief</b>  <i>Ed Vandenberg</i></p> <p>If “Everything Speaks,” what did these learning experiences say about what PUC believes?</p> <p>Plus / Delta / Questions / Needs</p>	<p>3:30 – 4:00</p>	<p><b>IT - HelpDesk, Communication Tools &amp; Intranet</b>  <i>Jaime Serrano</i></p>	<p>3:00 – 4:30</p>
		<p><b>Testing &amp; Accountability</b>  <i>Connie Rivas</i></p>	<p>4:30– 5:00</p>
		<p><b>Reflection &amp; Debrief</b>  <i>Kennedy Hilario</i></p>	<p>5:00 – 5:30</p>

Thursday July 8, 2010

Friday July 9, 2010

## New Leader Institute Agenda

<b>Breakfast &amp; Welcome</b> Review Agenda	8:00 – 8:30	<b>Welcome &amp; Breakfast</b> Review feedback	8:00 – 8:30
<b>Operations into Systems Triangle</b> <i>Nik Orlando</i> <ul style="list-style-type: none"> <li>Take one operations practice you learned about yesterday and address it using the systems triangle</li> </ul>	8:30 – 9:30	<b>Community Circle</b> <i>Ed Vandenberg</i> Topic Share an experience you have had when someone helped you grow as a person.(how does it make you feel and how do you deal with conflict) Review Tribe Norms & Reflection question <ul style="list-style-type: none"> <li>Tribes</li> <li>Define the processes and purposes for Community Circle</li> <li>Discuss effective practices for enrolling and supporting teachers</li> </ul>	8:30 – 9:30
<b>Community Circle</b> <i>Ed Vandenberg</i> <ul style="list-style-type: none"> <li><i>Describe a specific practice you would want to see at your school next year that speaks to your site based vision</i></li> </ul>	9:30 – 10:00	<b>Performance Management: Coaching &amp; Managing</b> <i>Kelly Montes De Oca</i> Describing the differences and interdependency between coaching and managing of team members. Agree on definition and purpose for coaching and managing Review PM Cycle	9:30 – 10:10
<b>LE 5: Beliefs, Practices, &amp; Actions at High Performing Schools</b> <i>Ed Vandenberg</i>	10:00 – 12:00	<b>Performance Management Cycle Stage 1 – 3</b> <b>Values, Job Expectations and Clear Measurable Expectations</b> <i>Ed Vandenberg &amp; Nik Orlando</i> Role Play a before year starts meeting: focus on Scholarly Culture from LE 5 Connection to PM Proficiency	10:15 – 11:00

## New Leader Institute Agenda

		<p><b>Daily Instruction</b></p> <p><b>Ensures students are actively learning</b></p> <ul style="list-style-type: none"> <li>• Hold students accountable to scholarly dialogue</li> </ul> <p><b>Learning Environment</b></p> <p><b>Establishes culture</b></p> <p><b>Maintains</b></p> <ul style="list-style-type: none"> <li>• Encourages students to take leadership</li> <li>• Encourages student to take risks</li> <li>• Maintains standards of behavior</li> </ul> <p>Role Play 1: new teacher (emphasis on coaching) (10 min &amp; 15 min debrief)</p> <p>Role Play 2: Returning teacher not on board - not bought in does not believe – during CST reflection days staff agreed regarding specific rituals and routines – in June not doing consistently – saw growth in other classrooms - gave rituals and routines reading to all.</p> <p>ESTABLISH RELATIONSHIP / ASSESS / CHALLENGE</p> <p><b>Do you believe?</b></p> <p><b>Lets see what it looks like and uncover why you are skeptical?</b></p> <p><b>What we believe at PUC...</b></p> <p><b>Can you do one thing?</b></p> <p>/ SUPPORT / RESULTS (emphasis on managing) (10 min &amp; 15 min debrief)</p> <p>At the end of the meeting need to get teacher to reflect on what it will look like and support provided</p> <p><i>Need to have teacher and teacher colleagues data</i></p> <p><i>Chart of students engaged / answering questions</i></p> <p><i>Calling on different students needs to occur</i></p> <p>Resources: PM Handbook, RACSR?</p>	
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## New Leader Institute Agenda

		List of promising practices for coaching & managing Updated Proficiency Criteria	
Lunch (supplied by vendor)	12:00 – 12:45	<b>Performance Management: Stage 4: Monitor and Determine Performance</b> <i>Kelly Montes De Oca</i>	11:00 – 11:30
<b>SSP Application</b> <i>Nik Orlando</i>  <i>Take one S.O. and create a draft for that objective. Include new learning from previous LE regarding high performing schools.</i>	12:45 – 1:45	Collecting qualitative and quantitative data Lunch (supplied by vendor)	11:30 – 12:15
<b>LE 6: Development of Team Members</b> <b>The role of Performance Management at PUC</b> <i>Ed Vandenberg</i>	1:45 – 3:30	<b>Performance Management</b> <b>Stage 4: Monitor and Determine Performance</b>  Collecting qualitative and quantitative data	12:15 – 12:45
<b>Reflection &amp; Debrief</b> <i>Ed Vandenberg</i>  If “Everything Speaks,” what did these learning experiences say about what PUC believes?	3:30 – 4:00	<b>Performance Management</b> <b>Stage 5: Feedback / Coaching</b> <i>Kelly Montes De Oca</i>  Practice DISC	12:45 – 2:15
Plus / Delta / Questions / Needs		<b>SPED: PUC Inclusion Model</b> <i>Kaye Ragland</i>	2:15 – 3:15
		<b>Reflection &amp; Debrief</b> <i>Ed Vandenberg</i>	3:15 – 4:00

## Summer 2010 Teacher Learning Lab

### Objectives

#### **Participants will:**

- Discuss and define what *Powerful Teaching and Learning* “looks like” in a PUC School;
- Articulate the criteria for quality implementation of the PUC Common Instructional Practices;
- Explore a variety of strategies that support quality implementation of the common instructional practices;
- Design a learning experience using the learning cycle and integrating other common instructional practices as applicable; and
- Generate a personal action plan for implementation of common practices.

Draft overview of the purpose of the learning lab  
Bio of lab teachers

Teachers need to bring their standards, an example of a lesson, how they already address scope and sequence

#### Questions:

- Where do I explicitly address TCRP as an initiative?
- Is it reasonable to expect a revised PM rubric by July 12?
- Is the emphasis on content right?
- Where is it necessary for leaders to attend?

## Summer 2010 Teacher Learning Lab

**Monday, July 12, 2009**

<b>Objectives:</b>	<ul style="list-style-type: none"> <li>• Discuss and define what <i>Powerful Teaching and Learning</i> “looks like” in a PUC School.</li> <li>• Articulate the criteria for quality implementation of the following common instructional practices: Backward Planning and the Learning Cycle.</li> <li>• Explore a variety of strategies that support quality implementation of the common instructional practices</li> </ul>
<b>8:00 – 8:30:</b>	<ul style="list-style-type: none"> <li>• Breakfast and Introductions</li> <li>• Review agenda and learning lab concept.</li> </ul>
<b>8:30 – 10:30:</b>	<p><b><i>Introduction to PUC Common Practices</i></b></p> <ul style="list-style-type: none"> <li>• PUC teachers are intellectual architects, reflective practitioners, highly relational, and relentlessly pursue excellence.               <ul style="list-style-type: none"> <li>◦ How do the PUC Common Instructional Practices support Powerful Teaching and Learning?</li> </ul> </li> <li>• Developing a Culture of Excellence               <ul style="list-style-type: none"> <li>◦ Doug Lemov Stations – No opt out, 100%, + 2 more</li> </ul> </li> </ul>
<b>10:30 – 10:45:</b>	<b>Break</b>
<b>10:45 – 12:30:</b>	<p><b><i>PUC Common Instructional Practice: Backward Planning</i></b></p> <ul style="list-style-type: none"> <li>• Backward Planning overview</li> <li>• Stage One: Identifying Desired Results               <ul style="list-style-type: none"> <li>◦ Designing a scope and sequence to map your year</li> <li>◦ Creating learning targets to drive individual learning experiences</li> </ul> </li> </ul>
<b>12:30 – 1:00:</b>	<b>Lunch</b>
<b>1:00 – 2:00:</b>	<p><b><i>PUC Common Instructional Practice: Backward Planning</i></b></p> <ul style="list-style-type: none"> <li>• Stage Two: Determine Acceptable Evidence               <ul style="list-style-type: none"> <li>◦ Designing summative unit assessments</li> <li>◦ Designing assessments for learning experiences</li> </ul> </li> </ul>
<b>2:00 – 3:30:</b>	<b><i>PUC Common Instructional Practice: Backward Planning and The Learning Cycle</i></b>



## Summer 2010 Teacher Learning Lab

<b>(built in break)</b>	<ul style="list-style-type: none"> <li>• Stage Three: Plan the Learning Experience               <ul style="list-style-type: none"> <li>○ Describe the stages of the Learning Cycle</li> <li>○ Articulate the physiological foundations of the Learning Cycle</li> <li>○ Focus on the alignment of the EPK and Application</li> <li>○ Correlate current instructional practices with the stages of the Learning Cycle</li> </ul> </li> </ul>
<b>3:30 – 4:00:</b>	Closing Reflection: 3.2.1. +1
<b>3:30 – 4:00:</b>	Home Fun: Read Assigned Lemov Strategies:

## Summer 2010 Teacher Learning Lab

	Tuesday, July 13, 2009	Wednesday, July 14, 2009
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>Articulate the criteria for quality implementation of the following common instructional practices: Reflective Learning Communities, Backward Planning and the Learning Cycle.</li> <li>Explore a variety of strategies that support quality implementation of the common instructional practices.</li> </ul>	<ul style="list-style-type: none"> <li>Articulate the criteria for quality implementation of the following common instructional practices: Reflective Learning Communities, Relevant and Cumulative Do Nows</li> <li>Explore a variety of strategies that support quality implementation of the common instructional practices.</li> </ul>
<b>Breakfast</b>	<b>7:45 – 8:00</b>	<b>7:45 – 8:00</b>
<b>Focus on Common Instructional Practices (15 min break)</b>	<p>8:00 – 11:00 : <i>Backward Planning and The Learning Cycle</i></p> <ul style="list-style-type: none"> <li>Revisit the Learning Cycle with a focus on APK and Reflection</li> <li>Introduce Instructional Alignment Templates (IAT) – Instructional leaders?</li> </ul>	<p>8:00 – 9:00: <i>Opening (Relevant and Cumulative Do Nows) and Closing Routines</i></p> <p>9:00 – 11:00: <i>The Engaged Classroom</i></p> <ul style="list-style-type: none"> <li>Managing a classroom focused on learning <ul style="list-style-type: none"> <li>Lemov Strategies: Tight transitions, Bell to Bell,</li> </ul> </li> </ul>
<b>Framing the Observations</b>	<p>11:00 – 11:30</p> <ul style="list-style-type: none"> <li>Introduction of the Learning Target</li> <li>The Learning Cycle</li> <li>Lemov Strategies</li> </ul>	<p>11:00 – 11:30</p> <ul style="list-style-type: none"> <li>Do Nows, Opening and Closing Routines</li> <li>Engagement</li> <li>Lemov Strategies</li> </ul>
<b>Lunch</b>	<b>11:30 – 12:30</b>	<b>12:00 – 12:30</b>
<b>Observation I</b>	12:30 – 1:25	8:30 – 9:45: Math
<b>Observation II</b>	1:40 – 2:35	10:00 – 11:20: ELA

## Summer 2010 Teacher Learning Lab

<b>Break</b>	<b>2:35 – 2:45</b>	<b>9:45 – 10:00</b>
<b>Debrief</b>	2:45 – 3:30:	12:30 – 1:00
<b>Closing</b>	3:30 – 4:00: <ul style="list-style-type: none"> <li>• Revisit Chalk Talk and Gallery Walk</li> <li>• Plus/Delta</li> </ul>	3:30 – 4:00: <ul style="list-style-type: none"> <li>• Revisit Chalk Talk and Gallery Walk</li> <li>• Plus/Delta</li> </ul>
<b>Homefun</b>	• Read Assigned Lemov Strategies:	Read Assigned Lemov Strategies:

## Summer 2010 Teacher Learning Lab

Thursday, July 15, 2009	
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>Articulate the criteria for quality implementation of the following common instructional practices: Reflective Learning Communities, and Reading, Writing and Speaking in the Discipline.</li> <li>Explore a variety of strategies that support quality implementation of the common instructional practices.</li> </ul>
<b>Breakfast</b>	<b>7:45 – 8:00</b>
<b>Focus on Common Instructional Practices (15 min break)</b>	<p>8:00 – 9:00 : Small group dialog based on questions from week</p> <p>9:00 – 11:00: <i>Reading, Writing and Speaking in the Discipline</i></p> <ul style="list-style-type: none"> <li>Word Walls</li> <li>Accountable Talk</li> </ul>
<b>Framing the Observations</b>	<p>11:00 – 11:30</p> <ul style="list-style-type: none"> <li>Use of Word Wall</li> <li>Accountable Talk</li> <li>Other Common Practices</li> </ul>
<b>Lunch</b>	<b>11:30 – 12:30</b>
<b>Observation I</b>	12:30 – 1:25
<b>Observation II</b>	1:40 – 2:35
<b>Break</b>	<b>2:35 – 2:45</b>
<b>Debrief</b>	2:45 – 3:30:
<b>Closing</b>	<p>3:30 – 4:00:</p> <ul style="list-style-type: none"> <li>Revisit Chalk Talk and Gallery Walk</li> </ul>

## Summer 2010 Teacher Learning Lab

	<ul style="list-style-type: none"> <li>• Plus/Delta</li> </ul>
<b>Homefun</b>	<ul style="list-style-type: none"> <li>• Finalize revisions on lesson and be prepared for inquiry groups</li> </ul>

## Summer 2010 Teacher Learning Lab

Friday, July 16, 2010	
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>• Discuss and define what <i>Powerful Teaching and Learning</i> “looks like” in a PUC School;</li> <li>• Articulate the criteria for quality implementation of the PUC Common Instructional Practices;</li> <li>• Explore a variety of strategies that support quality implementation of the common instructional practices and</li> <li>• Design a learning experience using the learning cycle and integrating other common instructional practices as applicable.</li> </ul>
<b>7:45 -8:00:</b>	Breakfast
<b>8:00 – 8:30:</b>	Review agenda
<b>Session I</b>	9:20 – 11:10: Modified Tuning protocol to give/receive feedback on lesson design (built in break)
<b>10:00 – 11:30?</b>	Lab Students - Finals
<b>Session II</b>	11:10 – 12:00: Learning Stations <ul style="list-style-type: none"> <li>• TBD based on need – use Lemov strategies as appropriate</li> </ul>
<b>Lunch</b>	<b>12:00 – 12:45: Celebration with Learning Lab Students!</b>
<b>Focus on Common Instructional Practices</b>	12:45 – 1:45: Data-driven Instruction and Decision Making <ul style="list-style-type: none"> <li>• Overview of the Continuous Cycle of Instructional Improvement</li> <li>• Review of Pre/Post data from lab classrooms</li> </ul>
<b>Closing Reflection I</b>	1:45 – 2:30: Wrap Up <ul style="list-style-type: none"> <li>• Revisit Common Instructional Practices charts: At first I thought; now I know...</li> <li>• Evaluation</li> </ul>



## Summer 2010 Teacher Learning Lab

<b>Closing Reflection II</b>	<p>2:30 – 4:00: Revisiting Our Big Idea</p> <ul style="list-style-type: none"> <li>• Artifact Creation</li> <li>• Share in regions</li> </ul>
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# Sample PD Calendar

August 16-20, 2010

Mon-Wed and Friday, 8:00am to 4:00pm

Thursday, 8:00am to 4:30pm

## Objectives

### **Participants will:**

- Discuss and define what a culture of high expectations looks like at CCECHS.
- Develop a greater understanding of their colleagues in support of collaboration.
- Develop norms of collaboration.
- Engage in articulation of Strategic Objectives and Key Results and development of Action Steps.
- Utilize year long calendar to plan Scope and Sequence in collaboration with Instructional Leader.
- Analyze data to inform School Success Plan
- Clarify protocols and procedures related to attendance, tardies, intervention and grading.
- Develop initial Performance Management goals.
- Clarify policies and procedures and set up gradebook for initial implementation of Standards-based Grading (SBG).
- Develop an artifact to frame the week and represent the experience.
- Brian to add outcomes for: PBIS, emergency, facilities, Special Ed, and any other.
- Develop as a school wide team

# Sample PD Calendar

Monday, August 16, 2010	
<b>Objectives:</b>	<p><b>Participants will:</b></p> <ul style="list-style-type: none"> <li>• Discuss and define what a culture of high expectations looks like at CCECHS.</li> <li>• Develop a greater understanding of their colleagues in support of collaboration.</li> <li>• Develop norms of collaboration.</li> </ul>
<b>8:00 – 8:30:</b>	<ul style="list-style-type: none"> <li>• Breakfast and introductions</li> <li>• Norms</li> <li>• Establish the theme for the week: Developing a culture of High expectations in a scholarly environment.</li> <li>• Review agenda</li> </ul>
<b>8:30 – 10:30:</b>	<p><b><i>Building a Culture of High Expectations</i></b></p> <ul style="list-style-type: none"> <li>• My commitment to the three commitments or what a culture of high expectations looks like in my class.             <ul style="list-style-type: none"> <li>○ Community Circle</li> <li>○ Implementing Community Circle within your class</li> <li>○ Norms posting ( have for distribution )</li> </ul> </li> <li>• Developing a Culture of High Expectations             <ul style="list-style-type: none"> <li>○ Begin Artifact</li> <li>○ Share CCECHS handbook</li> </ul> </li> </ul>
<b>10:30 – 10:45:</b>	<b>Break</b>
<b>10:45 – 11:45:</b>	<p><b><i>PUC Common Instructional Practice: Backward Planning</i></b></p> <ul style="list-style-type: none"> <li>• Handbook Review             <ul style="list-style-type: none"> <li>Attendance, Lunch program, Schedule, Calendar, After School Program, FST process, Discipline process</li> </ul> </li> <li>• Review common postings: Circle norms, School Wide Norms, emergencies</li> <li>• Expectations for content nights</li> <li>• Expectations for scope and sequence</li> </ul>
<b>12:00 – 1:00:</b>	<b>Lunch: Three Questions Ice Breaker</b>
<b>1:00 – 2:30:</b>	<p><b><i>The Learning Environment</i></b></p> <ul style="list-style-type: none"> <li>• Positive Behavior Intervention and Supports             <ul style="list-style-type: none"> <li>○ Classroom Procedures</li> <li>○ School-wide Procedures</li> </ul> </li> </ul>

# Sample PD Calendar

<b>2:30 – 3:45:</b> (built in break)	<p><i>PUC Common Instructional Practice: Aligned and Cumulative Assessment</i></p> <ul style="list-style-type: none"> <li>Standards-based Grading Workshop or Planning time for SBG</li> </ul>
<b>3:45 – 4:00:</b>	Closing Reflection: Plus/Delta, Burning Questions
<b>HomeFun!</b>	<ul style="list-style-type: none"> <li>Read Revised Performance Management Rubric/Criteria. Consider what 2-3 goals you would like to set within the framework. Come tomorrow with any questions.</li> </ul>

# Sample PD Calendar

<b>Tuesday, August 17, 2010</b>	
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>Engage in articulation of Strategic Objectives and Key Results and development of Action Steps.</li> <li>Utilize year long calendar to plan Scope and Sequence in collaboration with Instructional Leader.</li> <li>Analyze data to inform School Success Plan</li> <li>Develop initial Performance Management goals.</li> <li>SPED Objective</li> </ul>
<b>Breakfast</b>	<b>7:45 – 8:00</b>
<b>Using Data to Inform our Plans (15 min break)</b>	8:00 -- 9:00 New Teachers: Sources of Vision and Accountability  Returning Teachers: Planning Time for Scope/Sequence  9:00 – 11:00 Data Analysis Stations <ul style="list-style-type: none"> <li>Data Analysis Stations               <ul style="list-style-type: none"> <li>API calculation using CST data</li> <li>Strand Analysis of ELA CST data</li> <li>Individual College Plan data</li> <li>Behavioral and FST data</li> <li>Resource and EL data</li> </ul> </li> <li>Implications for SSP Strategic Objectives and Key Results</li> <li>Implications for Professional Development               <ul style="list-style-type: none"> <li>Academic Advisory Committee forms</li> </ul> </li> </ul>
	11:00 – 12:00: <ul style="list-style-type: none"> <li>Reviewing the revised Rubric and Criteria</li> <li>Generating Questions</li> <li>What to Expect: the PM Cycle, observations, and coaching meetings</li> </ul>
<b>Highly Effective Teachers: Performance Management</b>	
<b>Lunch</b>	<b>12:00 – 1:00 Departments add to artifacts on how their department will uphold a culture of high expectations</b>
<b>Planning time</b>	1:00 – 2:00 Scope/Sequence and PM Goals
<b>SPED P.D. (reflection built-in)</b>	2:00-4:00
<b>HomeFun!</b>	<ul style="list-style-type: none"> <li>Email ideas for PM goals and initial draft of Scope/Sequence to Jen by 8am Wed., 8/18</li> </ul>

## Sample PD Calendar

# Sample PD Calendar

<b>Wednesday, August 18, 2010</b>	
<b>Objectives:</b>	<p>Participants will ;</p> <ul style="list-style-type: none"> <li>• Discuss and develop plans for team building to support the common goals of a scholarly environment</li> <li>• Discuss and develop budget priorities for departments</li> <li>• Discuss and develop plans to support and facilitate the instruction of traveling teachers</li> <li>• Review and finalize concepts of the progressive discipline plan</li> </ul>
<b>Breakfast</b>	<b>7:45 – 8:00</b>
<b>Policies, Procedures, Protocols</b>	<p>8:00 -- 9:00 :</p> <p>Budget Review: Teachers will work through an activity to develop budget priorities and have a clear understanding of the budget situation. (department funding emphasis)</p> <p>Generate ideas for fund raising program</p>
	<p>11:00 – 12:00:</p> <p>Develop support for traveling teachers and creation of a scholarly environment for all learners in all classrooms.</p>
<b>Lunch</b>	<b>12:00 – 1:00 On our own (new teachers meet with mentor teachers)</b>
<b>PPDS</b>	<p>1:00 – 2:00 Review Positive Progressive Discipline System (VIDEO)</p> <p>Establishing school wide Scholarly Environment (Respond to articles)</p> <p>Develop priorities and buy-in for common operational practices</p> <p>What are the common and priority focus issues?</p>
<b>Emergencies/ facilities</b>	<p>2:00-4:00</p> <p>Child abuse reporting</p> <p>Student safety evacuation process</p> <p>Common language for the process</p> <p>Common expectations for students and staff during drills</p>
<b>HomeFun!</b>	•



# Sample PD Calendar

	<b>Thursday, August 19, 2010</b>	
	Home Office/Instructional Office Training	
<b>Breakfast</b>	<b>7:45 – 8:00</b>	
<b>HR</b>	8:00 – 9:00	
<b>Power School Data Team</b>	9:30- 10:30	
<b>Break</b>	<b>10:30 – 11:00</b>	
<b>Power School/Power Teacher (SBG) Data Team</b>	11:00-11:30	
<b>Lunch</b>	<b>11:30-12:30</b>	
<b>IT—Log In, Intranet, Calendar, Cyber Bullying</b>	12:30 – 2:00	
<b>Break</b>	<b>2:00 – 2:15</b>	
<b>Clinical Services</b>	2:15 – 2:30	
<b>Employee Reimbursement Accounting Team</b>	2:30 – 3:00	
<b>Instructional Strategies</b>	3:00- 4:30	

# Sample PD Calendar

Friday, July 16, 2010	
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>•</li> </ul>
<b>7:45 -8:00:</b>	Breakfast
<b>8:00 – 11:00</b>	SBG Workshop or Planning time <ul style="list-style-type: none"> <li>• Set up gradebooks</li> <li>• Complete survey monkey evaluation</li> <li>• ELD and SPED individual needs of students</li> </ul>
<b>11:00-12:00</b>	Closing: <ul style="list-style-type: none"> <li>• Artifact Completion</li> </ul>
<b>12:00 – 1:00:</b>	<b>Lunch with Counseling Department</b>
<b>1:00—4:00pm</b>	CPI

# Sample PD Calendar

## CCECHS Professional Development 2010-2011

### Draft Overview and Schedule

*The following summary and schedule overview are designed to give a general idea of the focus and configuration of the professional development for CCECHS teachers this year. As plans evolve, we will revise as needed.*

### Professional Development

Weekly and monthly professional development focuses in a rotating or as needed basis on the following priorities as reflected in our School Success Plan.

- **Assessment: Standards-Based Grading**
- **Data Analysis**
- **Instruction: Performance Management**  
Lemov book study and other research and techniques as needed
- **Content Literacy**  
A major goal for this year is to support students' literacy through collaboration of ELA teachers with departments of Science, Social Sciences, and Foreign Languages. Staff development with PUC Writing Rubric.
- **School Culture: Positive Behavior Intervention Supports and other initiatives as needed.** ESLRs goals. Parent Engagement (family rights)
- **Intervention:** Creating and maintaining a comprehensive pyramid of intervention.
- **Departmental Collaboration and Content-specific P.D.**  
Teachers will continue their vertical alignment efforts and engage in content-specific professional development
- **Grade-level Collaboration**  
Teachers will work together to establish grade-level norms, solve dilemmas, and meet the needs of students.
- **Resource Specialist Collaboration**  
We will work as a staff to successfully implement the co-planning model of resource collaboration.
- **School Committees**  
Teachers will work in committees as needed to plan and implement essential school events and programs, such as ESLRs, student behavior/recognition, parent engagement, test preparation, community circle, etc.
- **MAST Program**  
Our mathematics teachers will engage in an intensive professional development through the CMAST Program at Loyola Marymount University

### 2010-2011 Professional Development Draft Scope and Sequence

Date	PD Focus	Dept meeting focus
8/31 am	Operations; Emergency procedures Computer procedures	

# Sample PD Calendar

	School culture: Broken windows Dress code Intro to intervention	
8/31 pm	SBG: creating/revising first summative assessment Data committee meets to firm up SSP 1) Data Committee reports on SSP Get feedback from whole staff and assess readiness to commit to it.	
9/14 am	Jen explain role of data committee is to own the cycle of data analysis—that teachers will collect their own “dashboard” connected to the SSP and report to departments, which report to data committee, then creates a school dashboard and presents to all faculty and to RD and board of directors  2) Intervention:  Folders by period containing roster Data source customized by teacher Highlight tier two students Use intervention checklist to decide on first set of classroom interventions Identify supplemental needs (afterschool intervention, etc)	
9/14 pm	Instruction: Preparation for Goal-setting See connections between schoolwide non-negotiables and PM Lemov-checks for understanding	
9/21 am	Instruction: 4 M's (designing learning targets) Dept. Collaboration	All: any support needed in SBG or Powergrade
9/21 pm	Culture: Broken Windows Break into grade level teams. Intervention: Planning for intervention family night Family meeting expectations	Math: class set of student assessments (analyzed—high, med, low)

# Sample PD Calendar

9/24 PD Day	Pre-Assessment Data Analysis Committee meetings Data Director support available Intervention Dept. meeting times	
9/28 am	Intervention and Afterschool Program: Distribute FST Paperwork	All: shg needs Collect data for dashboard
9/28 pm	Checks for Understanding and 4 Ms Meeting in dept. teams	Math: review evidence cycle, provide support, schedule first evidence presentations, general support
10/5	Instruction: 4 Ms SSP revision? Commit! And Data presentation of dashboard	All: advance preparation for "40%" reporting for bmark I
	Differentiation for ELD students and the CELDT Dept. Collaboration	Math: evidence reports Matt and Christina
10/12	Family Meetings Planning	All: <ul style="list-style-type: none"> <li>discuss and report shg needs</li> <li>Look together at scope/sequences to compile departmental list of everybody's 40%. Ensure these can be clearly understood from scope/seq document as well.</li> <li>How are you doing with designing daily objectives to meet 4M's?</li> </ul>
	Writing Rubric Intro	Math: evidence reports Amy and Fernando. Also request everybody's 40%.
10/15 retreat	Intervention: FST Process and Student Roll Call Grade-level collaboration Special ed: one hour Benchmark I process SSP and pre-assessment data Committees	
10/19	Committees	Complete BI worksheets
	BI worksheets- last 10 min? dismiss	MAST PD

# Sample PD Calendar

	<p>others</p> <p>Instruction: Standards-based grading—open forum to prioritize needs—list concerns and rank them</p> <p>1-what wants going well/what is a struggle</p> <p>Pre-write reflect</p> <p>Share our successes</p> <p>Rank challenges</p> <p>Start discussion with easiest fixes/things that teachers do have ideas on</p> <p>More challenging questions that remain—report back</p>	
10/26	<p>Mavira announcements on intervention</p> <p>Ann: discipline address code</p> <p>PSJ</p> <p>Teachers select working group to be in</p> <p>Discipline working groups</p>	<p>Complete BI worksheets</p>
11/2	<p>SBG</p> <p>7:05-8:05</p> <p>Ann: Standards-based grading philosophy and Q and A with Dr. Pac</p>	<p>Math: Christina and Matt Evidence</p>
	<p>SBG- non-negotiables, schoolwide, teacher decisions</p> <p>Mixed faculty groupings</p> <p>SBG- draft of non-negotiables Communication to students</p> <p>Grade level meetings</p> <p>SBG—address burning questions and grading scenarios prior to meeting to continue working on Communication to students</p> <p>Explain about writing rubric—need a modified rubric to norm in next two</p>	<p>All other depts.:</p> <p>Math: Fernando and Amy evidence/Melissa practice through coaching)</p> <p>All other depts.:</p>
11/9		

# Sample PD Calendar

	<p>weeks.</p> <p>Reminder to update sharepoint with lesson plans and all formal assessments</p> <p>Bimarks—33-51 questions so far</p> <p>College-Ready promise</p> <p>Note all %s of Fs went down from 5-week!</p> <p>Time for College-Ready Promise baseline survey</p>	
11/16	<p>SBG—Common, Positive Communication to Students</p> <p>Grade-level collaboration.</p> <p>SBG continued.</p>	MAST PD
11/23	<p>FST process</p> <p>Completing FST referrals with CUM files and other data</p> <p>Just Desserts</p> <p>Grade-level collaboration.</p>	No math meeting or dept meetings (thanksgiving)



Los Angeles Unified School District  
Public School Choice 2.0  
Service Plan for Special Education

MCD Outcome	Component	School Plan
Federal requirement, District forms and publications are available	Search and Serve	<p>The Charter will adhere to the provisions of the Individual with Disabilities Education Improvement Act (IDEA) 2004 and state special education laws and regulations to assure that all students with disabilities are accorded a free, appropriate public education (FAPE). The Charter will comply with Section 504 of the Federal Rehabilitation Act, the American Disabilities Act, and all Office of Civil Rights mandates for students enrolled in the Charter School and will adhere to all Los Angeles Unified School District policies and procedures regarding special education. The Charter will also ensure that no student otherwise eligible to enroll in their charter school will be denied enrollment. As part of this responsibility, The Charter will have active “search and serve” procedures in place for identifying students who have or are suspected of having a disability and needing special education and related services.</p> <p>All schools will distribute the Are You Puzzled by Your Child’s Special Needs? brochure to every student to take home at the beginning of each school year. In addition, these brochures, as well as Section 504 brochures, will be prominently displayed in the main office of the school at all times, along with the Parent Resource Network posters in English and Spanish. Request for Special Education Assessment Forms, Student Information Questionnaire for Parents and Guardians, Parent Request for Reasonable Accommodations, and A Parent’s Guide to Special Education Services will be available in the primary language of the family in the school office.</p> <p>In order to ensure that students with disabilities, requiring special services, enrolling in the school are identified and promptly provided the appropriate services, questions designed to illicit the following information will be included on</p>

		<p>the enrollment forms filled out by all families enrolling their children in The Charter:</p> <ul style="list-style-type: none"> <li>• Did the student receive special education services at his/her previous school?</li> <li>• Did the student have an Individualized Education Program (IEP) at his/her previous school?</li> <li>• Did the student have a Section 504 Plan at his/her previous school?</li> <li>• Does the student have difficulties that interfere with his/her ability to go to school or learn?</li> <li>• Has this student been identified for Gifted and Talented Educational services?</li> </ul> <p>All staff members will be trained annually concerning “search and serve” and the processes involved in pre-referral and referral for Special Education assessment and are expected to be able to assist parents with the process.</p>
Outcome 2	Intervention Programs	<p>The entire school community will play an important part in ensuring that student outcomes are met and in meeting the needs of students who are not achieving at expected levels. If a student is not progressing in a manner consistent with academic success, the school will arrange immediate interventions. The Charter utilizes a preventative, proactive three-tiered Response to Intervention (RTI) approach, involving consultation and collaboration between the general education and special education staff in service of all students.</p> <p>Tier One consists of implementing core curriculum and universal interventions for all students, including differentiated instruction strategies and supports. At this level:</p> <ul style="list-style-type: none"> <li>• Benchmark assessment is conducted</li> <li>• Evidence based curricula and strategies are place for all students and differentiation of instruction is documented by general education teachers with in the general education classroom.</li> <li>• At risk students are identified in the areas of language, academics, and/or behavior</li> </ul>

	<ul style="list-style-type: none"> <li>• Students identified as at risk are monitored for a reasonable period of time, using curriculum-based measurement, observation and work samples to determine instructional effectiveness</li> <li>• The data is analyzed by the general education teacher, in consultation with administrators and/or special education staff, to determine if universal interventions should be continued or if there is a need to proceed to the increased intensity of tier two interventions.</li> </ul> <p>Tier Two consists of targeted group interventions provided for some students who are at risk based on assessment and observational data. The interventions are designed to be short-term and highly efficient. At this level:</p> <ul style="list-style-type: none"> <li>• Parents are notified through a conference, phone call or written notification that additional small group or individual instruction may be needed for student, including the interventions that will be implemented.</li> <li>• Interventions will include individual tutoring and small group instruction, which will take place before, during and after the regular school day. Teachers and tutors will implement tutoring clinics or Saturday academies, which will operate throughout the school year.</li> <li>• Progress monitoring is administered and the results documented frequently. Personnel collaborate and compare data over time, in order to identify areas of growth and concern, and implement strategies and interventions, accordingly.</li> <li>• If, after several progress monitoring checks, the data indicates regression or no progress, a decision is made regarding the need for more intensity in delivery time or instruction</li> </ul> <p>Tier Three is for the few students who require more comprehensive and intensive intervention. At this level”</p> <ul style="list-style-type: none"> <li>• The Family Success Team (FST) process is initiated by a teacher, resource person, administrator or parent. This process is comparable to what is commonly referred to as the Student Success Team (SST) and includes parents, administrators, teachers, and others as appropriate.</li> </ul>	
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		<ul style="list-style-type: none"> <li>• Parents or guardians will be formally contacted in writing by inviting them to attend an initial Family Success Team meeting.</li> <li>• Student Success Team will be assembled and a meeting scheduled. The Student Success Team will consist of at minimum the student's referring teacher, the Instructional leader, parent(s), student and any other teacher wishing to participate based on his/her knowledge of the student's academic proficiency (additional persons may be invited to be members of the FST, such as a resource specialist, counselor, community members as appropriate, etc).</li> <li>• This meeting will articulate a student's strengths, weaknesses and areas of concern and analyze the baseline and progress monitoring data from tier two.</li> <li>• The FST may determine the need for additional information on the student. This may include the use or administration of informal or formal measures to gather individual data on the area of concern.</li> <li>• Strategies and actions to be taken will be identified and assigned to persons present. A timeline will be developed to implement and document strategies and actions taken. A follow-up SST meeting will also be scheduled at this time.</li> <li>• If the child is making progress using the FST interventions, the interventions are continued for an agreed upon period of time.</li> <li>• If progress toward the goal is minimal, FST members will revise or change the intervention, including a timeline detailing how long interventions will be implemented and dates for progress monitoring.</li> <li>• If the intervention plan is successful, the FST will create a plan for reducing the level of support needed by the child to the tier two level, including a realistic timeframe for accomplishing this goal</li> <li>• The FST may make a referral to special education if the intervention plan and its revisions are not successful in helping the child meet the goals identified by the FST process</li> </ul>
Outcomes 5, 17 and 18 LAUSD Board	Discipline Foundations Plan and Behavior Support	<p>The Charter utilizes a preventative, proactive three-tiered Positive Behavior Support approach. All campuses have trained Behavior Intervention Case Managers (BICM) available for Functional Behavior Assessments and/or Functional Analysis</p>

Policy		<p>Assessments.</p> <p>Tier One consists of implementing a school wide Positive Behavior Program which clearly defines community norms and expectations for all students, including supports, responsibilities and consequences for not meeting the norms. The emphasis is on the positive shaping of all students' behavior, reinforcement of progress, family participation, and mutual respect amongst learning community members.</p> <p>Tier Two involves analysis of observational and academic data to determine behaviors that impede learning. Targeted interventions such as teaching additional behavioral, organization, study skills, or social skills, behavior contracts, or reinforcement programs designed to decrease problem behaviors and increase appropriate replacement behaviors are implemented. For students with IEPs or 504 plans, it is critical to ensure that accommodations are being appropriately and consistently implemented. Students may be referred for individual or group counseling.</p> <p>Tier Three interventions are for students whose behavior impedes learning on a regular basis and at a level that requires more intense intervention. For students without IEPs, the Family Support Team (FST) process may be initiated. Multiple means of data collection and analysis are used to identify the behavior that is impeding learning, the predictors of the behavior, what the child is gaining or avoiding by using the behavior, a replacement behavior the student can use in order to get his or her needs met, environmental factors that support the target behavior, skills that need to be taught, consequences and reinforcements to be used in order to increase the replacement behavior, and a behavior support plan is created. Progress is monitored by the team within reasonable timeframes. Referral for special education assessment is one possible outcome of this process. For students with IEPs, a Functional Behavioral Assessment or Functional Analysis Assessment is conducted by the BICM and a Behavior Support Plan or Behavior Intervention Plan is implemented as part of the IEP.</p>
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		<p>The Charter will ensure that it makes necessary adjustments to comply with the mandates of state and federal laws, including the IDEA and Section 504 of the Rehabilitation Act of 1973, regarding discipline of students with disabilities. Prior to recommending expulsion for a student with disabilities, the charter school will convene a manifestation determination IEP. The charter school will collect data pertaining to the number of special education students suspended or expelled and communicate this data to LAUSD, in accordance with policy.</p>
Required for Planning	Description of Student Population	<p>The District is approved to operate as a single-district SELPA under the provisions of Education Code § 56195.1(a). Charter schools authorized by the District are deemed to be public schools within the District. For the purposes of special education, The Charter shall be deemed a public school within the District. The District will determine the policies and procedures necessary to ensure that the protections of special education laws be extended to students at The Charter in the same manner as students in all District schools.</p> <p>As a public school of choice, The Charter is open to all students. It is expected that between 12 % and 15% of the students at The Charter will be students with special needs. The majority of these students are expected to be receiving special education services under the eligibility categories of Speech and Language Impairment, Specific Learning Disability, Other Health Impaired, Emotional Disturbance, and Autism, however: The Charter will be prepared to provide services to students receiving services under the less common eligibility categories such as, but not limited to Mental Retardation, Orthopedic Impairment, Traumatic Brain Injury and Visual or Hearing Impairment. A wide range of programs and services will be implemented in order to provide FAPE in the appropriate least restrictive environment for students with mild to severe disabilities, according to SELPA policies and regulations.</p>
Outcome 2	Special Education Program Description	<p>The school will provide to each student identified with a disability: a free and appropriate public education in the least restrictive environment; an Individualized Educational Program with an annual review and a 3 year re-evaluation; unbiased, comprehensive assessment conducted by an interdisciplinary team; all rights, protections and procedural safeguards specified in federal and state law and reiterated in local mandates; early identification of disability through “search and serve” procedures. The Charter will adhere to the requirements of the <i>Chanda Smith</i> Modified Consent Decree and court orders imposed upon LAUSD pertaining to special education. This also includes submission of documents and information, participating in</p>



		<p>reviews, and attending informational sessions and meetings.</p> <p>The Charter will provide a continuum of services within a collaborative inclusion framework, based on the following Inclusion Program Guiding Principles:</p> <p><b><u>Attitudes and Beliefs</u></b></p> <ul style="list-style-type: none"><li>• High standards for all students are the primary focus of the school community.</li><li>• School personnel are committed to accepting responsibility for the learning outcomes of students with disabilities.</li><li>• School personnel and students are trained and prepared to receive a student with disabilities.</li><li>• Parents are continuously informed and support the program goals.</li><li>• Special education and general staff is committed to collaborative practice in general education classrooms.</li></ul> <p><b><u>Service and Physical Accommodations</u></b></p> <ul style="list-style-type: none"><li>• Services needed by a student identified with exceptional needs are available (i.e. health, physical, occupational, or speech therapy).</li><li>• Accommodations to the physical plant and equipment are adequate to meet the student's needs (i.e. toys, building and playground facilities, learning materials, assistive devices)</li></ul> <p><b><u>School Support</u></b></p> <ul style="list-style-type: none"><li>• Adequate numbers of personnel, including aides and support personnel, are available.</li><li>• Adequate staff development and technical assistance, based on the needs of the school personnel, are provided (i.e., information on disabilities, instructional methods, awareness and acceptance activities for students and team building skills).</li><li>• Appropriate policies and procedures for monitoring individual progress, including grading and testing, are in place.</li></ul>
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	<p><b><u>Collaboration</u></b></p> <ul style="list-style-type: none"> <li>• Teaming approaches are used for problem-solving and program implementation.</li> <li>• General Education teachers and Resource/Inclusion Specialist Teacher collaborate to discuss observations and assessments, plan and modify curriculum, co-teach, and meet and support parents with learning at home.</li> </ul> <p><b><u>Instructional Methods</u></b></p> <ul style="list-style-type: none"> <li>• Teachers have and continuously develop the knowledge and skills needed to select adapt curricula and instructional methods according to individual student needs.</li> <li>• A variety of instructional arrangements are available (i.e., team teaching, cross-grade grouping, peer tutoring, and teacher assistance teams).</li> <li>• Teachers foster a cooperative learning environment and promote socialization.</li> <li>• Student support is provided on a weekly/daily basis within and outside of students' classroom based on assessed and observed needs by both the General Education teacher and the Resource/Inclusion Specialist Teacher.</li> </ul> <p>While the majority of special education services will be provided within the general education classroom with appropriate supports, some related services, such as speech/language, occupational therapy or counseling, are provided on a pull-out basis, as determined by the IEP team.</p> <p>The Charter will provide a Learning Center program for students who require additional support outside of the general education classroom. The IEP team will determine if a student qualifies for Learning Center services based on all compelling evidence including, but not limited to the following:</p> <ul style="list-style-type: none"> <li>• Recommended for SDC</li> <li>• Minimum of two years below grade level in ELA and Math</li> <li>• Failing Grades</li> <li>• Qualifies for CMA</li> </ul> <p>The Learning Center at The Charter will provide:</p> <ul style="list-style-type: none"> <li>• Small class size in order to meet individual needs</li> </ul>
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		<ul style="list-style-type: none"> <li>• Differentiated instruction designed to enable students to master challenging grade level academic content by varying the method of delivery, rather than the content of instruction.</li> <li>• Individualized pacing</li> <li>• Basic skills review and practice</li> <li>• Focus on IEP goals in service of achieving grade level standards</li> <li>• An atmosphere where students learn to understand their strengths and challenges and how to self-advocate.</li> <li>• A classroom environment where students are comfortable taking risks</li> <li>• Strong collaboration between the Learning Center, General Education, and RSP teachers</li> <li>• Pre-teaching and vocabulary support in subjects other than ELA and Math, such as social studies and science.</li> <li>• Strong, regular communication with parents regarding student progress and activities (newsletter, phone calls, email, notes home).</li> </ul> <p>Students with IEPs will be given every opportunity to succeed in completing A-G courses for graduation; however a Certificate of Completion option will be available for students who, at the end of their sophomore year, are determined by their IEP team to require modified curriculum. These students will be provided with an individualized academic program in addition to community-based internship/work opportunities, and their transition plans will become the driving force in their IEPs, in preparation for postsecondary education or training options in keeping with their long-range life goals.</p>
Outcomes 8, 10, 13, 14, 15	IEP Process: Implementation and Monitoring	<p>Within the 60 day timeline of the assessment process, The Charter will provide parents with a minimum of 10 days written notice of the time and date of the Individualized Education Program (IEP) team meeting. Parents may request that the meeting be rescheduled if they are unable to attend at the scheduled time. They may also give permission for the team to proceed without them if they are unable to attend, or may attend via phone.</p>

	<p>The Charter will conduct an Individualized Education Program (IEP) team meeting that includes required team members within mandated timelines for each student assessed to discuss results and present levels of performance, determine eligibility, and (if eligible) specify special education instruction and services. At the meeting, parents are provided with information on their special education rights and responsibilities, least restrictive environment, and complaint and due process procedures. The IEP team will present data on student progress and results from assessments, make decisions regarding eligibility, goals, program, placement, and exit from special education through the IEP process according to federal, state and District timelines. IEP team membership shall include parent/guardian, school administrator, a current core teacher, and other persons such as those who assessed the student. The IEP team will determine the least restrictive environment for each student. The IEP team membership shall include special education representation from the District and from the student's district of residence, if other than LAUSD, when service will be considered within least restrictive environments other than at The Charter. If team members (including parents) decide that The Charter is not the appropriate placement for the students, representatives from the student's home district will advise the family of the continuum of program options offered by the home district. The Charter will develop the IEP in collaboration with the family and representatives from the student's home district. Through this process, the IEP team can identify an appropriate educational placement and program for the student. If the student's parents do not agree with the recommendations of other members of the IEP team, the student will continue to attend The Charter until the disagreement is resolved through mediation and/or due process procedures (See below).</p> <p>The Charter will be responsible for implementing programs and services, including related services required by IEPs of students enrolled at the school. The general program of instruction provided to students with disabilities shall be responsive to the required sequence of courses and related curriculum for students at The Charter.</p> <p>The charter school's responsibility to provide related services to a student with disabilities begins when the student enrolls in the school. However, to allow for a</p>	
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	<p>smooth transition to the school, the District will continue to fund services for those special education students enrolling in the school who have been receiving non-public agency (NPA) itinerant services from the District for thirty (30) days after enrollment. This is to allow the school to conduct the required thirty day IEP team meetings and to execute contracts with NPAs as necessary to facilitate the student's transition. When requested by the school, a representative from the Local District Special Education Office may attend a student's first IEP meeting at the school to assist with transition issues.</p> <p>For students transferring to the school from another school district, the school will be responsible for providing those related services required by the students' IEPs upon the students' enrollment regardless of the type of service provider (school, NPA, or private). IEP team meetings for such students shall be held within thirty (30) days of enrollment to facilitate the students' transition to the school.</p> <p>The charter school shall ensure that all teachers and other persons who provide services to a student with disabilities shall be knowledgeable of the content of the student's IEP and sufficiently trained to implement it. The charter school shall maintain a copy of each student's IEP at the school site.</p> <p>The Charter will maintain responsibility for monitoring progress towards IEP goals for the students with special needs. Information on a student's progress on goals and objectives will be sent home according to the same schedule as progress and grade reports for general education students</p> <p>An IEP will be held annually for each student with an IEP, with a reevaluation IEP every three years. Any member can ask to reconvene the IEP at any time in order to make appropriate changes in goals or services.</p> <p>The Charter will participate in the state quality assurance process for special education (i.e., verification reviews, coordinated compliance self-reviews, complaints monitoring, procedural safeguards, and the local plan). The Charter will participate in internal validation review (DVR).</p>	
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		<p>The District may invoke dispute resolution provisions set out in a charter, initiate due process hearings, and/or utilize other procedures applicable to The Charter if the district determines that such action is legally necessary to ensure compliance with federal and state special education laws and regulations or the Modified Consent Decree.</p> <p>In the event that a parent or guardian of a student attending The Charter initiates due process proceedings, both The Charter and the District will be named as respondents. Whenever possible, the District and The Charter shall work together in an attempt to resolve the matter at an early stage (informal settlement or mediation).</p> <p>During due process proceedings and any other legal proceedings or actions involving special education, The Charter will be responsible for its own representation. If The Charter retains legal representation for a due process proceeding or other legal proceeding or action, The Charter will be responsible for the cost of such representation.</p> <p>Because The Charter will manage, and is fiscally responsible for, its students' special education instruction and services, The Charter will be responsible for any prospective special education and related services, compensatory education and/or reimbursement awarded by a due process hearing officer, court or settlement based on an allegation or allegations that The Charter failed to fulfill its responsibilities under state and federal special education laws and regulations (which include, among other things, identifying students with disabilities, assessing students, conducting IEP team meetings, developing appropriate IEPs, and implementing IEPs).</p> <p>If parents' attorney's fees and costs are to be paid because parents are the prevailing party as a result of due process hearing or settlement agreement based on THE CHARTER alleged failure to fulfill its responsibilities under state and federal special education laws and regulations, The Charter will be responsible for payment of those attorneys' fees and costs.</p>
Outcomes 10, 18	Procedures for Identification and Assessment of Students	Formal referrals for assessment may be made by the Family Success Team, a parent, teacher, administrator, or resource person. Within fifteen days, not counting school vacations greater than five days, of the receipt of a referral for assessment, the parent or guardian will receive a written response from The Charter. If The Charter determines that an assessment of a child is not appropriate, the parent will

	<p>receive written notice that explains the basis for the refusal and the parent's right to request a due process hearing to contest the charter's refusal. If The Charter determines that an assessment is appropriate, the parent will receive an Assessment Plan.</p> <p>The parent must consent to the assessment plan (AP) by signing the AP before the assessment can take place. The school has thirty (30) days, not counting school vacations greater than five (5) days, from receipt of the parent's signed AP to complete the assessment and hold an IEP meeting.</p> <p>If the parent or guardian does not consent to the AP, The Charter may take steps to protect the student if it is believed that the student is being denied necessary services. The Charter may request a meeting with the student's parents or guardians to resolve this difference of opinion or may initiate a due process hearing to override that parent's refusal to consent.</p> <p>The assessment plan will describe the types of assessments that may be used to determine the eligibility of students for special education instruction and services. Assessments will be conducted, within legal timelines, after receiving the parents' written consent. The Charter is responsible for developing the assessment and providing the assessment which may include individual testing, observations, interviews as well as review of school records, reports and work samples. The assessment guidelines include: parental consent, evaluation in all areas related to suspected disability, multiple assessments without cultural or racial or gender bias and multidisciplinary team to include a teacher knowledgeable in the disability. The parents must consent for the initial evaluation and initial placement, be notified of any change in placement that may occur, and be invited along with teachers to conferences and meetings to develop individual education programs. Assessments shall be completed within the mandated 60 day (calendar) period.</p>
Outcome 2	<p>Instructional Plan for Students using grade level standards</p> <p>The Charter's Special Education Program is a collaborative inclusion program. Students with mild to moderate special needs in areas such as Specific Learning Disability, Other Health Impairment, including but not limited to ADHD, Speech/Language Impairment, and Autism, at The Charter will participate fully in</p>



	<p>the general education program with appropriate accommodations and supports as specified in their IEPs. As often as possible, interventions will take place within the general education classroom. However, before and after school intervention, learning centers and pull-out support services will be available according to students' IEPs. These services will be provided within the following four tier framework:</p> <p><u>Tier 1: Special Education Support as Consultative Services:</u> On tier one, Special Education teachers:</p> <ul style="list-style-type: none"><li>▪ <b>Frequently and systematically provides consultative services</b> to general education teachers. This consultation is intended to provide assistance and ideas for how to teach and work with students with disabilities who are placed in general education classes.</li><li>▪ <b>Meet with general education teachers during regularly scheduled collaborative meetings, review assessment and progress data</b>, to make specific recommendations for addressing special learning needs.</li><li>▪ Observe classroom instruction and provide feedback</li><li>▪ Receive weekly agenda, lesson plans, and supplemental materials from general education teachers and provides feedback</li><li>▪ Utilize regular and frequent student progress reports to communicate with general education teachers</li><li>▪ Reviews student data and asks clarifying questions so general education teacher can adjust support and instruction</li><li>▪ Attend grade level and department meetings to share information and plan instruction with gen. ed. teachers</li><li>▪ Present on special education topics at Wednesday PD (not less than twice a year)</li><li>▪ Provide consultative support, along with the school college counselor, for Transition services that are provided in general education setting.</li></ul> <p><u>Tier 2: Special Education Support within general education Classroom (RSP Student)</u> On tier two includes all level 1 processes, plus:</p>	
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		<p>Special Education teachers:</p> <ul style="list-style-type: none"><li>▪ <b>Deliver instruction to student with special needs in general education classrooms (may include instructional aides).</b></li><li>▪ Collaborate with general education teachers and may share instructional responsibilities in one of several <b>co-teaching</b> models.</li><li>▪ Co-plan instruction with general education teachers</li><li>▪ Utilize a variety of co-teaching models to jointly deliver instruction</li><li>▪ Collaboratively establish grading protocols</li><li>▪ Collaboratively reflect on the effectiveness of co-teaching practices and plan adjustments</li><li>▪ Both teachers are actively involved in the lesson presentation and assessment process</li><li>▪ Special education shares recommendations for adapted materials, instructional strategies, and other ideas</li><li>▪ Inclusive language is used by both teachers in class</li><li>▪ Teachers utilize nonverbal communication during lesson activities to jointly manage classroom</li><li>▪ Transition services may be provided on a pull out basis to work on post-secondary ITP goals (students can be pulled out individually or in groups as appropriate)</li></ul> <p><u>Tier 3: Special Education Support within general education classroom w/ some additional support outside of gen education class :</u></p> <p>Tier 3 includes all levels 1 and 2 processes, plus:</p> <ul style="list-style-type: none"><li>• Special education teacher provides instruction in a learning center classroom for a portion of the day.</li><li>• In this model, students with disabilities are scheduled for a designated time period to visit the learning center to receive <b>specialized instruction</b> in areas such as reading, math, writing, and transition.</li><li>• Targeted pull-out as needed is also an option.</li><li>▪ Learning Center classes includes time allotted to systematically provide</li></ul>
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	<p>support with work from other classes</p> <ul style="list-style-type: none"><li>▪ School Site will develop a time and space for the Resource Teacher/Assistant (within regular school schedule) to provide intense remediation to these students (i.e. finding a time in the schedule to provide intense intervention/@Advisory class)</li><li>▪ Learning Center Teacher creates lesson plans which include remediation/intervention on reading, writing, and math</li><li>▪ Learning Center Teacher creates lesson plans which include instruction on organization skills, study skills, self advocacy, and transition goals</li><li>▪ Learning Center class has a syllabus, course outline, and unit plans which are clearly communicated to students</li><li>▪ Learning Center has a structure with clear expectations, routines</li><li>▪ Special education and general education teachers establish a system for students to best utilize the intervention in the Learning Center</li><li>▪ Students utilize learning center on a flexible basis as needed to accommodate their needs</li><li>▪ Transition services provided in learning center using transition curriculum that aligns to student's post secondary goals</li></ul> <p>*Tier 4 students will have modified curriculum and will be described in the next section</p> <p>The Charter's instructional program is a college preparatory program providing all necessary courses for a student to be well prepared to attend college. In order to support student success, The Charter will implement the following common practices for all students, including those with special needs;</p> <p><u>Differentiation of Instruction:</u></p> <p>All teachers will utilize concepts of differentiation of instruction, including flexible and varied grouping, to provide a variety of options for presentation, engagement, and expression over the course of instruction for each unit and essential standard.</p>	
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	<p><u>Standards Based Grading:</u></p> <p>Standards based grading connects student mastery to standards. In our grade book the specific standards will be listed and as we go throughout the year students will be assessed on these standards and the most recent score will replace the former score. All standards will be graded on a scale of 1-4.</p> <p>4= mastery- students at a 4 are able to show that they know the standard and can accurately teach it to others.</p> <p>3= proficient- students at a 3 know the standard but may have a few minor errors in their performance and are not confident to teach others.</p> <p>2=basic- students at a 2 know parts of the standard but have some gaps in their understanding.</p> <p>1 = novice- students at a 1 know very little about the standard and need significant re-teaching.</p> <p>In order to pass our classes students must earn a 2.0 average and have 65% or higher score of all the standards for this class. Which means out of 21 standards students must have a 2 or higher on at least 13 standards. (This number will change based on how many targets/standards are being assessed.) Multiple means/options of assessment will be provided for each standard.</p> <p><u>Assessment practices:</u></p> <p>Teachers will utilize the following principles in the creation and use of diagnostic, formative and summative assessments:</p> <ul style="list-style-type: none"> <li>• Use summative assessments to frame meaningful performance goals</li> <li>• Show criteria and models in advance.</li> <li>• Assess before teaching</li> <li>• Offer appropriate choices.</li> <li>• Provide feedback early and often.</li> <li>• Encourage self-assessment and goal setting.</li> <li>• Allow new evidence of achievement to replace old evidence.</li> </ul> <p><u>Data Driven Intervention:</u></p> <p>Students will be selected for targeted intervention based on CST, benchmark</p>
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		<p>assessments, and grades. Staff will work with students to set goals. Pre and post tests will be administered.</p> <p><u>Portfolio Review Process:</u> A portfolio review process will be implemented in order to include work samples as part of student success data.</p> <p><u>Learning Log:</u> Each student will maintain a learning log in order to track their own progress on the standards. Students with special needs will be given support, as needed, in order to actively participate in the planning and documentation of their progress.</p> <p><u>School-wide College Ready Writing Campaign :</u> As a school we will develop common expectations for student writing outcomes in each department that support the development of college –ready writers. These expectations will encompass the following attributes:</p> <ul style="list-style-type: none"> <li>• All student responses will be written in complete sentences with justification to support answers.</li> <li>• Students will be trained on how to compose short answer responses that address the question and synthesizes the answer with the goal of going beyond the initial prompt.</li> <li>• Students will be taught how to write succinctly as an expert in the given content.</li> </ul>
Outcome 7A, 7B	Instructional Plan for students using Alternative Standards	<p>Students with moderate to severe special needs in areas such as Mental Retardation, Traumatic Brain Injury, or moderate to severe autism, at The Charter will participate as often as possible in the general education program with appropriate accommodations and supports as specified in their IEPs. As often as possible, interventions will take place within the general education classroom. However, specialized classes, learning centers, post-secondary life preparation services and additional pull-out support services will be available according to students' IEPs.</p>

Outcome 13	Plan to Provide Supports	<p>These services will be provided on tier 4 of the framework described in the previous section:</p> <p><u>Tier 4: Special Education Support w/in gen education classroom w/ a modified schedule for life skills/workability training</u></p> <ul style="list-style-type: none"> <li>▪ All level 1,2, and 3 processes, plus:</li> <li>▪ Student with disabilities receives support from a special education teacher for the majority of the school day. Students will be scheduled in specially designed classes with modified curriculum for math and English and receive collaborative support in other subjects.</li> <li>▪ Student must have spent two years at level 3 with maximum intervention support.</li> <li>▪ Transition services will be provided in the special education setting.</li> <li>▪ Students have modified curriculum and modified grading to meet their needs</li> <li>▪ Students have a flexible schedule that includes part-time academic and part time life skills/ workability training/internship</li> <li>▪ Students are instructed in the general education setting but modified curriculum and grading allow them to have success on academic goals</li> <li>▪ Students are given a Certificate of Completion option</li> <li>▪ Lesson plans created based on standards and reflect rigor, student engagement, and high expectations</li> <li>▪ Lesson plans and instructional strategies reflect needed accommodations and modifications for students to access instruction</li> <li>▪ Courses have syllabus, course outline and unit plans which are clearly communicated to students</li> <li>▪ Class has clear structure and expectations, routines, and grading policies</li> <li>▪ The Special Education teacher establishes regular system/time to provide consultation to general education teachers</li> <li>▪ The Special Education Teacher utilizes regular and frequent student progress reports to communicate with general education teachers</li> <li>▪ Transition services provided by special education teacher during advisory, curriculum skills, or Learning Center special education class</li> </ul>
		The Charter will implement the programs and services, including providing related

	& Services	<p>services, required by the IEPs of the students enrolled at The Charter. The Charter may request related services (e.g., Speech, Occupational Therapy, Adapted P.E., Nursing, Transportation, etc.) from the District, subject to availability and on a “free-for-service” basis, by submitting written requests to the Charter Office. The Charter may also provide related services by hiring credentialed or licensed providers through private agencies or independent contractors. The Charter will provide an appropriate environment for the provision of related services. All related services providers utilized by The Charter will provide services on a regularly scheduled basis, have Welligent access and training, and record their service minutes in the Welligent Tracker. The entry of service minutes in the Welligent Tracker will be monitored by a supervisor on a monthly basis.</p>
Outcome 9 (for programs with students 14 and older)	Transition Planning Strategies	<p>An IEP team shall develop Individual Transition Plans (ITPs) for transition services that help students with disabilities, ages 14 and older, meet their postsecondary goals for a successful transition to adult living. The ITP is reviewed yearly as part of the IEP process, and is developed by all members of the IEP team. The specific needs of the student for post-secondary services should determine who is invited to the IEP meeting. Multiple means of assessment, such as student and parent interviews, check lists, aptitude tests, personality tests, etc. will be used in transition planning and outside agencies may become involved. The student should always be included as part of the transition IEP team.</p>
Federal Requirement	Access to Extra-Curricular/Non academic activities	<p>All students at The Charter have access to Extra-Curricular/Non-academic activities based on established criteria and are encouraged to participate. Students with special needs may be provided with accommodations or supports in order to facilitate participation, as determined by administrators, general education teachers and special education staff. Students with special needs will have full access to elective classes, with appropriate accommodations and supports provided in accordance with their IEP.</p>
Federal Requirement	Providing Extended School Year	<p>The Charter provides summer school classes in the areas of English/Language arts and Mathematics. These classes are open to all students needing summer support.</p>
Federal Court Requirement	MCD Outcomes (to be woven among others)	<p>The District is approved to operate a single-district SELPA under the provisions of the California Education Code, Section 56195.1 (a). Charter schools authorized by the District are deemed to be public schools within the District for purposes of special education. The District will determine the policies and procedures necessary</p>



		<p>to ensure that the protections of special education law extend to students in the charter schools in the same manner as students in all District schools.</p> <p>The Charter will adhere to the requirements of the <i>Chanda Smith</i> Modified Consent Decree and court orders imposed upon LAUSD pertaining to special education. This also includes submission of documents and information, participating in reviews, and attending informational sessions and meetings.</p> <p>The Charter will use District forms to develop, maintain, and review assessments and Individual Education Plans, IEPs, in the format required by the District and will enter assessment and IEP data into District's designated data system (Welligent) in accordance with LAUSD policies and procedures. THE CHARTER will maintain copies of assessments and IEP materials for district review. The Charter School will submit to the District all required reports, including but not limited to Suspension/Expulsion Report, SESAC and Welligent IEPs, in a timely manner as necessary to comply with state and federal and Modified Consent Decree requirements.</p>
All	Professional Development	<p>The Charter shall provide planned staff development activities to special education staff, general education staff, administrators and office/other staff, and participate in available appropriate District Trainings to support access by students with disabilities to the general education classroom, general education curriculum, integration of instructional strategies and curriculum adaptations to address the diverse learner, and interaction with non-disabled peers, as well as to develop collaborative practices and co-teaching strategies. Professional development activities will be provided throughout the year and will include both theoretical/informational and collaborative/activity-based working sessions designed to increase best practices.</p>
Outcomes 6,8, and 16	Staffing/Operations	<p>The Charter school special education personnel shall be appropriately credentialed and/or licensed consistent with California laws and regulations unless a written waiver has been granted by the California Department of Education with respect to state laws and regulations. Credentials will be monitored by the Human Resources Department prior to hire and on a regular basis thereafter. Legal guidelines for</p>



		<p>maximum caseload will be adhered to, or a waiver applied for from the California Department of Education, as required by law. The amount of services to be provided, as well as time required for paperwork and service tracking will be considered when determining staffing needs. The Charter will ensure that all special education personnel are appropriately trained/certified in the use and maintenance of assistive technology and/or health equipment mandated for a student with an IEP. Special education personnel will be evaluated on a regular basis using a Performance Management Tool representative of their duties and responsibilities. In addition, The Charter will ensure that the teachers and other persons who provide services to a student with disabilities are knowledgeable of the content of the student's IEP and trained in providing necessary accommodations or modifications.</p> <p>The Charter shall abide by the stipulations in the MOU. Typically, the charter would receive its allocated share of AB602 special education funds and is fiscally responsible for the provision of special education services and instruction to the students they serve. The allocated amount shall be calculated using a funding model based on student population (average daily attendance). The charter shall keep daily attendance for each student which shall be reported and certified according to District policies and procedures. The Charter may request specific related services from the District on a fee basis based on the District's availability.</p> <p>The District will collect a fair share contribution from independent charter schools for district-wide costs for special education instruction and services.</p>
Outcome 14	Parent Participation	<p>The parents of each child will be cultivated as critical partners in the children's education and will be critical in supporting their progress. Parents will learn what is expected of them as partners in this process at parent meetings and workshops, beginning at the start of each school year, and continuing throughout the year. In addition to the general parent meetings, meetings and workshops will be held specifically for parents of students with special needs for the purpose of engaging them in their child's education, as well as increasing their understanding of learning issues and disability rights and responsibilities. Parents will support the school in consistently monitoring students' progress, through dialogues with the child, and</p>

	<p>review of his/her class work. If students do not demonstrate adequate progress based on their level, their parents will be informed immediately. We will enlist their support in addressing their challenges. Teachers will regularly communicate with parents about the progress of any student who is receiving interventions. Parents of students with special needs are encouraged to be involved in school committees and advisory boards, and are informed about opportunities for involvement as advocates for students with special needs in their communities.</p> <p>All communications, including assessment plans, IEPs, meeting notices, and other written communication, such as Are You Puzzled by Your Child's Special Needs brochure, Section 504 Brochure, A Parent's Guide to Special Education, The IEP and You, Least Restrictive Environment Brochure, Informal Dispute Resolution Brochure, Uniform Complaint Brochure, Complaint Response Unit/Parent Resource Network Brochure, Complaint Response letter and Parent Request for Reasonable Accommodations, etc., will be provided in a timely manner and in the parent's primary language.</p> <p>The LAUSD Parent Training Calendar will be provided to all parents of students with special needs on a monthly basis and parents will be encouraged to participate in these training opportunities.</p> <p>Parent concerns and suggestions are welcomed and parents are informed that they may contact the administrator or special education staff with at any time by phone, in writing or, when possible, in person. Parents' calls, messages, or letters are responded to within twenty-four hours and addressed as soon as possible. Parents are informed of their rights and provided with information on formal and informal complaint procedures.</p> <p>The District will investigate and respond to all special education complaints the District receives pertaining to The Charter including the District's Uniform Complaint Procedures, Office for Civil Rights and California Department of Education Special Education Compliance Complaints. The Charter will cooperate with the District in any such investigation and provide the District with any of all</p>	
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		<p>documentation that is needed to respond to complaints. The Charter will be solely responsible for any and all costs resulting from, arising out of, or associated with the investigation and implementation of appropriate remedies.</p> <p>In the event that a parent or guardian of a student attending The Charter initiates due process proceedings, both The Charter and the District will be named as respondents. Whenever possible, the District and The Charter shall work together in an attempt to resolve the matter at an early stage (informal settlement or mediation).</p> <p>During due process proceedings and any other legal proceedings or actions involving special education, The Charter will be responsible for its own representation. If The Charter retains legal representation for a due process proceeding or other legal proceeding or action, The Charter will be responsible for the cost of such representation.</p> <p>Because The Charter will manage, and is fiscally responsible for, its students' special education instruction and services, The Charter will be responsible for any prospective special education and related services, compensatory education and/or reimbursement awarded by a due process hearing officer, court or settlement based on an allegation or allegations that The Charter failed to fulfill its responsibilities under state and federal special education laws and regulations (which include, among other things, identifying students with disabilities, assessing students, conducting IEP team meetings, developing appropriate IEPs, and implementing IEPs).</p> <p>If parents' attorney's fees and costs are to be paid because parents are the prevailing party as a result of due process hearing or settlement agreement based on The Charter's alleged failure to fulfill its responsibilities under state and federal special education laws and regulations, THE CHARTER will be responsible for payment of those attorneys' fees and costs.</p>
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# Boys & Girls Club of San Fernando Valley

11251 GLENOAKS BLVD. PACOIMA, CA 91331 • PHONE 818/896-5261 • FAX 818/897-5866 • WWW.BGCSFV.ORG

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November 30, 2010

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Dr. Jacqueline Elliot  
PUC Schools  
111 North First Street, Suite 100  
Burbank, CA 91502

Dear Dr. Elliot,

It is with great pleasure that I write this letter on behalf of the Boys and Girls Club of San Fernando Valley in support of PUC Schools application to the Los Angeles Unified School District to operate a small learning community at Valley Region High School # 5. The mission of our Boys & Girls Club is dedicated to promoting leadership, character, health and career development while emphasizing social, cultural, emotional and educational growth among youth and this we see in PUC Schools.

PUC Schools have a long history of serving the residents of the Northeast San Fernando Valley. Over the course of the last twelve years, I have witnessed the organization grow from one to seven schools in this region. As a long time community advocate, I applaud your efforts in providing the residents of this community with quality options in public education. Your plans for collaborating with the Los Angeles Unified School District to operate a small learning community at Valley Region High School # 5 are commendable. We wholeheartedly support your application and are eager to continue to grow our partnership with you at this new location.

Sincerely,

LeRoy Chase  
President and Chief Executive Officer



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#### Program Team

Mayra Esparza  
Maribel Palafox

#### Main Office

11243 Glenoaks Blvd #11  
Pacoima, CA 91331

#### Contact

Office 818-890-2928  
Fax 818-834-5186

[www.youthspeakcollective.org](http://www.youthspeakcollective.org)

#### Youth Speak Collective

is a youth driven initiative  
empowering low income  
communities in the Northeast  
San Fernando Valley with the  
skills necessary to pursue  
higher education and create  
strong communities.

All donations are tax-deductible.  
YSC Tax ID #27-0126980

11-29-2010

Ramon Cortines, Superintendent of Schools  
Los Angeles Unified School District  
333 South Beaudry Avenue, 24th Floor  
Los Angeles, CA 90017

Re: Partnership Uplifting Communities

To Whom It May Concern:

Youth Speak Collective supports **The Partnerships to Uplift Communities** proposal and will help to cultivate a community of learners devoted to academic excellence, equitable access, and individual integrity. We understand and support the idea behind this public school choice application and hope to bring more technical education training courses into the high school level.

Youth Speak Collective (YSC), a 501 (c)(3) non-profit organization, is a youth-driven initiative empowering low-income communities in the Northeast San Fernando Valley with the skills necessary to pursue higher education and create strong communities. We provide teens from throughout the Northeast San Fernando Valley with creative, high-quality programs that channel their intellect and talent, build their academic skills, and strengthen their investment in their own communities. This work is made possible by a strong network of volunteers, contributors, and community leaders who all take an active role in advancing our work.

There is a definite need in our local community for better academic programs that help will develop critical thinkers and lifelong learners who attain mastery in all core subjects, emphasizing math and science, in order to become college-prepared and career ready. PUC schools and YSC will meet the needs of diverse learners and teach all students effective communication and leadership skills while building character as a means to empower all stakeholders to make a positive impact in their community.

Please let me know if you require any additional information to relay my support of **The Partnerships to Uplift Communities** public school choice application.

Sincerely,

David Kietzman  
YSC Executive Director





Occidental College  
1600 Campus Road  
Los Angeles, CA 90041-3314

Department of Mathematics  
TELEPHONE 323.259.2822  
FAX 323.259.2704

November 30, 2010

Ref Rodriguez  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502

Dear Ref:

It is with great enthusiasm that I write this letter of support for the PUC Schools' application to operate a charter school at the Taylor Yard site, commonly known as Central Region High School # 13. I am an Associate Professor of Mathematics at Occidental College who is honored to serve as the founding Chairman of the Board of Directors of the Education Strategy Group Foundation. This foundation is an outgrowth of the Education Strategy Group that began over seven years ago when you, Maria Avila (Director of the Center for Community Based Learning at Occidental College), professors from Occidental College, and other interested education leaders and community members came together out of a deep desire to change the historically low educational outcomes for students who reside in Northeast Los Angeles. Although retaining its emphasis on a grassroots approach to transforming education in this region, the Education Strategy Group Foundation recently incorporated as a California Public Benefit Corporation.

For more than 10 years, PUC Schools has operated high performing charter schools in Northeast Los Angeles. What has always made PUC distinctive is that it has never seen itself as a competitor to the traditional public schools operating in the area. In fact, the organization, under your leadership has gone out of its way to build bridges across all types of schools in order to improve the quality of education for all students in the region. The Education Strategy Group Foundation is likewise committed to supporting and enhancing all schools in the region in order to ensure all students are provided with a rigorous college preparatory educational experience. We are committed to ensuring all students graduate high school ready for college.

Your vision for creating a collaborative across the five schools operating small learning communities on the Taylor Yard campus is directly in line with how PUC has operated in this region for the past 10 years and with the mission of the Education Strategy group Foundation. I am eager to support your efforts in developing this collaborative and fully support your application to the Los Angeles Unified School District.

Sincerely,

Alan P. Knoerr  
Chairman, Board of Directors of the Education Strategy Group Foundation  
Associate Professor, Department of Mathematics, Occidental College  
[knoerr@oxy.edu](mailto:knoerr@oxy.edu)



OCCIDENTAL COLLEGE  
1600 CAMPUS ROAD  
LOS ANGELES, CA 90041-3314

November 29, 2010

Ref Rodriguez Ed.D.  
Founder  
PUC Schools  
111 North First Street, Suite 100  
Burbank, CA 91502

RE: Central Region High School # 13

Dear Dr. Rodriguez:

Please accept this letter as evidence of support from the Center for Community Based Learning (CCBL) at Occidental College for PUC Schools' application to operate a charter school on the Central Region High School #13 campus. The Center is dedicated to community based learning, in which students apply what they learn in the classroom to community projects, and embodies the four cornerstones of the College's mission: excellence, equity, community and service. The Center for Community Based Learning serves as a resource for such efforts, and acts as a clearinghouse for students, faculty, and staff who are working toward solutions to pressing issues in the community - locally, regionally, nationally, and globally.

Through the CCBL partnership with PUC, for close to ten years, we have witnessed your commitment to providing an excellent educational experience for all children. For the past two years we have followed your efforts to build a collaborative between different types of schools, including charter and pilot schools to operate on the campus. We applaud your commitment to develop this unique collaborative, demonstrating that charter schools can come together with other innovative public schools in common pursuit of academic excellence for all students. We are eager to partner with you in whatever way possible to ensure all schools operating on that campus become schools of excellence.

As a life-long resident of this community, you understand the unique needs of its children. The Northeast region of Los Angeles has many assets that I know you will tap into as you help implement the vision of college success for all students on this campus. We are here to support and help make Central Region High School # 13 a national model of collaboration and excellence.

Sincerely,

A handwritten signature in cursive script, reading "Celestina Castillo".

Celestina Castillo  
Assistant Director



LMU-Center for Math and Science Teaching  
1 LMU Drive, Suite 2400  
Los Angeles, CA 90045

November 29, 2010

Partnership to Uplift Communities (PUC) Schools  
111 North First Street, Suite 100  
Burbank, CA 91502

Dear Jacqueline Elliot and Ref Rodriguez:

The Center for Math and Science Teaching at Loyola Marymount University fully supports PUC School's efforts to operate charter high schools at Central Region H.S. #13 and Valley Region H.S. #5. The Center for Math and Science Teaching (CMAST) at LMU is dedicated to strengthening science, technology, engineering, mathematics (STEM) and STEM-related fields by transforming the teaching and learning of mathematics and science.

We are eager to continue our multiple partnerships with PUC Schools and to grow these partnerships in the new high schools. Currently, PUC and CMAST are partners in implementing two programs, the Los Angeles Math and Science Residency (LAMS) and the Math and Science Teaching (MAST) system.

LAMS is an innovative and rigorous year-long teacher training partnership program that integrates practice, mathematics and science content, theory, and pedagogy through an in-field apprenticeship model where Residents, aspiring educators and future leaders, are partnered with PUC mentor teachers in the classroom to learn how to effectively teach math and science. These Residents share PUC's vision and have committed to teach within PUC for three years following their residency year.

The MAST System is designed around a curriculum that equally values student learning and teacher knowledge of mathematics and science. The curriculum aligns with recommendations for a visionary professional development program and is delivered through a cognitive apprenticeship model where PUC teachers and CMAST expert clinical practitioners work side-by-side in the classroom and organization to transfer effective practices that increase student engagement and achievement. The MAST System institutionalizes an active culture of math and science learning within a classroom, school, organization, and community.

Over the course of the last two years we have enjoyed a partnership that I believe will continue to transform the way in which Math and Science teaching is conducted in urban schools.

PUC Schools' deeply held value of developing teachers into excellent practitioners and its deep commitment to providing excellent professional development should transcend to the other schools that will share those campuses. We are poised and ready to support you in this endeavor.

Sincerely,



Katharine Clemmer  
Executive Director



Janet Murguía  
President and CEO

California Regional Office  
523 West 6th Street, Suite 550  
Los Angeles, CA 90014

TEL 213.489.3428  
FAX 213.489.1167  
www.nclr.org

December 1, 2010

Jacqueline Elliot  
Ref Rodriguez  
Founders  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502

Dear Dr. Elliot and Dr. Rodriguez-

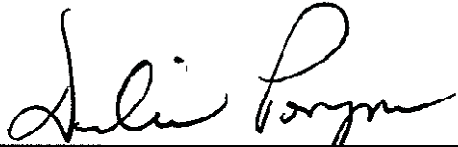
On behalf of the National Council of La Raza (NCLR), I am pleased to write this letter of support for PUC Schools' applications to operate early college high schools on two PSC campuses, Central Region H.S. # 13 and Valley Region High School # 5. The NCLR has long been an advocate of high quality charter schools, particularly those providing high quality options for predominantly Latino communities. As you recall, in 2002, we partnered with PUC Schools for the first time in supporting the development of Milagro Charter School. In 2003 and 2004, through our partnership with the Bill and Melinda Gates Foundation's Early College Initiative, we supported PUCs efforts to develop two early college high schools, CALS Early College High School and Community Charter Early College High School. We are excited to learn that you have decided to replicate this successful model at the schools you intend to operate on the CR HS #13 and VR HS #5.

Research shows that good schools effectively serving minority students are scarce. Even scarcer are those with all the right ingredients to be long standing entities promoting long term success in their students. PUC Schools has our commitment as an affiliate member to available resources our organization offers for your ensured success. We believe your early college model has all the necessary components and has created a student centered learning environment that pays close attention to the needs of the students you serve. In addition, the organization's passionate vision is aligned with student needs and your programs reflect their culture and promote their success.

CALS Early College High School and Community Charter Early College High School are educational models that we at NCLR believe serve as true alternatives for the under-served urban youth of Los Angeles. PUC Schools has consistently demonstrated success in the development and operation of high achieving charter schools serving low-income minority students. Your vision recognizes the importance of honoring a person's heritage. The PUC Schools Early College Model has a well-planned educational program that creatively meets the needs of the children you serve. PUC Schools possess a well thought out and sound business plan that makes optimal use of funds in the creation of diverse teaching and learning environments. Most noteworthy is the network of support you have built in your community from local businesses, academic professionals, parents, teachers, and local public figures.

The PUC Schools Early College High School is a model elevating the educational standards in the Los Angeles area. NCLR strongly supports PUC Schools and offers this letter of support as evidence of our partnership and our dedication to your mission and your development of two charter schools at CR HS #13 and VR HS #5.

Sincerely,

A handwritten signature in black ink, appearing to read "Delia Pompa", written over a horizontal line.

Delia Pompa  
Senior Vice-President

## Appendix VIII: CURRICULAR RESOURCES

Textbooks currently adopted for use at Community Charter Early College High School

### **Arts:**

*Art In Focus*

Glencoe/McGraw-Hill

4th Edition

Gene Mittler,

*Essential Elements 2000*

Hal-Leonard

Lautzenheiser, T.

### **English/Language Arts:**

*Please see Core Literature List at **end of this document***

### **Foreign Language:**

*!Ven Conmigo! Nuevas vistas*

Holt, Rinehart and Winston

Level one advanced

Author: Barbara Kristof

*!En español! Dos*

McDougal Littell

Gahala, Carlin, Heining-Boyton, Otheguy, Rupert

*Abriendo Puertas Tomo I y Tomo II*

McDougal Littell/ Nexttext,

2003.

*AP Language Preparation Student Workbook*

Holt, Rinehart and Winston

2007

*Abriendo Paso Gramatica and*

*Abriendo Paso Lectura*

Pearson/ Prentice Hall

2007

Diaz, Jose M., Nadel, Maria and Collinns, Stephen J.

Rodriguez, Rodney T. Momentos Cumbres de las literaturas hispanicas. Upper Saddle River, NJ: Pearson, Prentice Hall, 2004.

Virgilio, Carmelo, Valdivieso, L. Teresa and Friedman Edward H. Aproximaciones. Boston: McGraw-Hill College, 1999

# PUC Core Literature Lists

(revised July 2010)

*Nuevas Vistas Dos*

Holt, Rinehart and Winston  
2006.

## **Mathematics:**

*Geometry*

McDougall Littell  
2004  
Larson et al

*Calculus*

Brooks/Cole  
Stewart

*Algebra 1*

McDougal Littell  
Larson, Boswell, Kanold, Stiff

*Algebra 2*

McDougal Littell  
Larson, Boswell, Kanold, and Stiff

*Trigonometry*

Fifth Edition  
Thomson  
Charles McKeague and Mark Turner

## **Science:**

*Chemistry*

Prentice Hall  
2005  
Wilbraham, Stanley, Matta, Waterman

*Essentials of Anatomy and Physiology*, Marieb, Prentice Hall, 4<sup>th</sup> ed., 2009

*Prentice Hall Biology*

Pearson Prentice Hall  
2006  
Miller, Kenneth R.  
Levine, Joseph S.

## **Social Sciences:**

*World History: Modern Times*

Glencoe - McGraw Hill  
California Edition  
Spielvogel

# **PUC Core Literature Lists**

(revised July 2010)

*American Government*

Magruder's - Pearson/Prentice Hall

California 2006

McClenaghan, William A.

*Call to Freedom: 1865 to the Present*

Hold Rinehart Winston

2003

# PUC Core Literature Lists

(revised July 2010)

## CORE LITERATURE LIST

### Purpose

In effort to ensure rigorous reading selections and knowledge equity for PUC students, this list of core literature was established. English-Language Arts teachers and Instructional Team members will collaborate bi-annually (at minimum) to review and update the list based on current research on literature and teaching. conducted both within and outside of our schools.

### Context

In 2008, representatives from each middle and high school collaborated on the creation of the first draft of the core literature lists. In 2010, the list was revised with input from ELA teachers at a PUC-wide literacy professional development meeting. Continued research and revision will take place during the 2010-2011 school year.

### Background

In addition to referencing literature selections used by PUC teachers, book lists from high performing charter schools nation-wide, and the College Bound Reading List, the representatives developed the following criteria for quality literature to guide their selections:

Text selections should:

- Have literary merit (i.e., it lends itself to discovery and in-depth analysis, addressing big ideas and universal concepts)
- Be engaging and sparks discussion (i.e., critical analysis of the author's craft, controversial/ethical dialog, etc.)
- Have historical significance, interdisciplinary connections can be made
- Have enriching vocabulary – selections should reflect the instructional level not necessarily the independent reading level of the students
- Be classical (i.e., provides an entry point to scholarly discussions about literature and ensures a common literary experience once they enter college)

The core literature list for each grade level should:

- Have a balance between canonical (classics) and contemporary works
- Include culturally relevant selections, defined as both internal and external to the Latino perspective, which will challenge our students to look develop an understanding of global diversity and multiple perspectives
- Represent multiple genres
- Provide choice relevant to both student and teacher interests



# PUC Core Literature Lists

Books that are **highlighted** = non fiction

## Reading Requirements

The minimum reading range expectations for secondary in-class reading is **5-7 novels**.\*\* This reading range was determined by surveying other high performing schools that are successfully preparing students for college success (i.e., Roxbury Prep, University Park Campus School, etc.) in addition to considering the national reading standard of 1,000,000 words/year (to be read in and out of class). [\*\*Revised for ONLY the 2010-2011 school year. Teachers will teach a minimum of three novels from the list and conduct action research around the design components and criteria of a successful literature unit.]

## Anchor Texts and the Text Bank

The following core literature lists are organized into two categories: *Anchor Texts* and the *Text Bank*. *Anchor Texts* are works that must be read in that grade level; however, the teacher may determine the order and placement in their scope and sequence. The rationale behind determining *Anchor Texts* at each grade level was to ensure that all PUC students read the same strong foundation of literature before graduating. The *Text Bank* provides a range of texts that individual teachers may select based on student/teacher interest, student readiness, and cross curricular connections at their site. These books may be used for whole class instruction or in literature circles.

## Summer Reading

The Text Bank may also be utilized to determine summer reading options. A school site may wish to assign mandatory reading to students before entering the school (6<sup>th</sup>/9<sup>th</sup>) or between grades. In this case, books should be selected from the Text Bank of the grade students are entering. Additionally, teachers will need to select books to be used in credit recovery classes in the summer. These books should be selected from the previous year's Text Bank.

## Organizing Themes

**All** of the **anchor texts** in each grade level are organized so that teachers might develop an organizing theme, such as an essential question, for student examination. These themes should guide a teacher in developing and delivering his/her curriculum for the anchor texts, provide cohesion for students, and drive formal writing assessments. Most anchor texts, and many selections in each text bank, are also thematically aligned to the standards-based historical and social themes students will study in Social Studies/History classes for that grade level, thus supporting cross-curricular planning.

## Lexile Levels

The Lexile level of each text is included in parenthesis behind each book where possible (NP denotes that the selection is *not prose*). Although there is no direct correspondence between a specific Lexile measure and a specific grade level, the ranges in the table heading represent an effort to describe the typical Lexile measure of students and of texts at a given grade level. (Note that there is considerable overlap between grades.) This information is for descriptive purposes only and should not be interpreted as a prescribed guide.

It is important to note that the Lexile measure of a book refers to its text difficulty only. A Lexile measure does not address the content or quality of the book. Lexile measures are based on two well-established predictors of how difficult a text is to comprehend: word frequency and sentence length. Many other factors affect the relationship between a reader and a book, including its content, the age and interests of the reader, and the design of the actual book. Therefore, you will note that there are book selections that do not "fit" within the designated range for the grade level in which it is placed.

## Action Research Orientation

# PUC Core Literature Lists

Books that are **highlighted** = non fiction

In alignment with PUC's action research orientation, it should be noted that this list will be revisited every two to three years by an English department committee to receive feedback, make additions/omissions, and complete any other necessary revisions. Although it is important to maintain stability of the foundational anchor texts, it is equally important to gather both qualitative and quantitative data to ensure that this list is meeting the needs of both our students and our college ready mission. If a teacher wishes to "pilot" a book for their grade level that they believe might eventually be a good addition to the list, the following guidelines should be followed: 1) a book **can not** be pulled from another grade level's list, 2) approval from the instructional leader must be given **prior** to instruction; and 3) a book can only be piloted until the next revision committee meets then must be brought to the committee for approval.

**2010-2011 Additions to the Text Banks** (grade level and cross-curricular themes, if applicable, are noted next to the text below):

- The Acts of King Arthur and His Noble Knights, John Steinbeck (990)—7<sup>th</sup> (Medieval)
- Shabanu: Daughter of the Wind, Suzanne Fisher Staples (970)—7<sup>th</sup> (Islam)
- The Lightning Thief, Rick Riordan (740)—6<sup>th</sup>
- Forgotten Fire, Adam Bagdasarian (1050)—to 7<sup>th</sup>
- A Place Where the Sea Remembers, Sandra Benitez (790)—to 10<sup>th</sup>
- And Still We Rise: The Trials and Triumphs of Twelve Gifted Inner-City High School Students, Miles Corwin (NP)—to 11<sup>th</sup>
- A Thousand Splendid Suns, Khaled Hosseini (830)—to 11<sup>th</sup>
- Freakonomics, Steven Levitt and Stephan Dubner (NP)—to 12<sup>th</sup>
- This Bridge Called My Back, Gloria Anzaldua and Cherrie Moraga, eds.(NP)—to 12<sup>th</sup>

**2010-2011 Moves** (from one grade level to another):

- The Crucible, Arthur Miller (1320)—from 8<sup>th</sup> to 11<sup>th</sup> grade
- Wuthering Heights, Emily Bronte (1380)—from 9<sup>th</sup> to 12<sup>th</sup>
- Great Expectations, Charles Dickens (1230)—from 9<sup>th</sup> to 12<sup>th</sup>
- Always Running, Luis Rodriguez (870)—from 10<sup>th</sup> to 9<sup>th</sup>
- Like Water for Chocolate, Laura Esquivel (1030)—from 10<sup>th</sup> to 9<sup>th</sup>

# PUC Core Literature Lists

Books that are **highlighted** = non fiction

6 <sup>th</sup> Grade (850-1050)	7 <sup>th</sup> Grade (950-1075)
<b><i>Anchor Texts<sup>1</sup>:</i></b> <u>Seed Folks</u> , Paul Fleischman (710) <sup>º</sup> <u>The Giver</u> , Lois Lowry (760) <u>The Odyssey</u> , Homer (Penguin Children's Classics) (1000+)	<b><i>Anchor Texts<sup>1</sup>:</i></b> <u>The Outsiders</u> , S.E. Hinton (570) <u>The Circuit</u> , Francisco Jimenez (880) <sup>º</sup>
<b><i>Text Bank<sup>3</sup>:</i></b> <u>Hatchet</u> , Gary Paulson (1020) <u>Esperanza Rising</u> , Pam Munoz Ryan (750) <sup>º</sup> <u>Freak the Mighty</u> , Rodman Philbrick (1000) <u>Holes</u> , Lois Sachar (660) <u>The Boy of the Painted Cave</u> , Justin Denzel (800) <u>The Cay</u> , Theodore Taylor (860) <u>The Egypt Game</u> , Zilpha Keatley Snyder (1010) <u>Tuck Everlasting</u> , Natalie Babbitt (770) <u>Story of the World</u> , Susan Wise Bauer <u>Chronicles of Narnia</u> , C.S. Lewis (870) <u>A Wrinkle in Time</u> , Madeleine L'engle (740) <u>Number the Stars</u> , Lois Lowry (670) <u>Maniac Magee</u> , Jerry Spinello (820) <u>My Side of the Mountain</u> , Jean Craighead George (810) <u>Shadow of the Bull</u> , Maia Wojciechowska (740) <u>Brooklyn Bridge</u> , Karen Hesse (680) <u>Homecoming</u> , Cynthia Voight (630) <u>Bud, Not Buddy</u> , Christopher Paul Curtis (950) <u>The Lightening Thief</u> , Rick Riordan (740)	<b><i>Text Bank<sup>3</sup>:</i></b> <u>The Pearl</u> , John Steinbeck (980) <u>The Acts of King Arthur and His Noble Knights</u> , John Steinbeck (990) <u>Shabanu: Daughter of the Wind</u> , Suzanne Fisher Staples (970) <u>The Samurai's Tale</u> , Erik Christian Haugaard (960) <u>Beowulf</u> (Graphic Novel or abridged) (1000) <u>Where the Red Fern Grows</u> , Wilson Rawls (700) <u>City of Ember</u> , Jeanne Duprau (680) <u>The Devil's Arithmetic</u> , Jane Yolen (730) <u>Walk Two Moons</u> , Sharon Creech (770) <u>The Thief of Always</u> , Clive Barker (740) <u>Way to Rainy Mountain</u> , N. Scott Momaday (890) <u>Out of the Dust</u> , Karen Hesse (NP) <u>The Black Pearl</u> , Scott O'Dell (980) <u>Tangerine</u> , Edward Bloor (680) <u>Barrio Boy</u> , Ernesto Galarza (1140) <sup>º</sup> <u>My Antonia</u> , Willa Cather (1010) <u>Living Up the Street</u> , Gary Soto (1140) <sup>º</sup> <u>Dragon Wings</u> , Laurence Yep (870) <u>Catherine, Called Birdy</u> , Karen Cushman (1170) <u>Behind the Mask: Bio of Queen Elizabeth</u> , Jane Resh Thomas (1170) <u>The Door in the Wall</u> , Marguerite de Angeli (990) <u>Forgotten Fire</u> , Adam Bagdasarian (1050)

<sup>º</sup> This book is by a Latino author OR describes themes related to Latino heritage and culture.

<sup>1</sup> Teachers must include these Anchor Texts in their curriculum.

<sup>3</sup> Teachers may select additional texts from the Text Bank to equal the minimum required reading range of 5-7 texts.

# PUC Core Literature Lists

Books that are **highlighted** = non fiction

8 <sup>th</sup> Grade (1000-1100)
<p><b>Anchor Texts<sup>1</sup>:</b></p> <p><u>My Brother Sam is Dead</u>, James Collier (770) or <u>Johnny Tremain</u>, Esther Forbes (840) <sup>2</sup></p> <p><u>Of Mice and Men</u>, John Steinbeck (630)</p> <p><u>Roll of Thunder, Hear My Cry</u>, Mildred Taylor (920)</p>
<p><b>Text Bank<sup>3</sup>:</b></p> <p>Song of the Trees, Mildred Taylor (710)</p> <p><u>Kaffir Boy</u>, Mark Mathabane (1040)</p> <p><u>Incidents in the Life of a Slave Girl</u>, Harriet Jacobs</p> <p><u>The Narrative of the Life Frederick Douglas</u>, Frederick Douglas</p> <p><u>Gulliver's Travels</u>, Jonathan Swift (1090-1330)</p> <p><u>Across Five Aprils</u>, Irene Hunt (1100)</p> <p><u>Fever: 1793</u>, Laurie Hallse Anderson (580)</p> <p><u>The Slave Dancer</u>, Paula Fox (970)</p> <p><u>Little Women</u>, Louisa May Alcott (1210)</p> <p><u>Call of the Wild</u>, Jack London (1010)</p> <p><u>The Red Badge of Courage</u>, Stephen Crane (900)</p> <p><u>The Education of Little Tree</u>, Forrest Carter (890)</p> <p><u>The Witch of Blackbird Pond</u>, Elizabeth Speare (850)</p> <p><u>Go Ask Alice</u>, Beatrice Sparks (1010)</p> <p><u>Deathwatch</u>, Robb White (990)</p> <p><u>Flowers for Algernon</u>, Danel Keys (910)</p> <p><u>The House on Mango Street</u>, Sandra Cisneros (870) <sup>9</sup></p> <p><u>Travels with Charley</u>, John Steinbeck (1010)</p> <p><u>An American Childhood</u>, Annie Dillard (1040)</p> <p><u>Night</u>, Elie Wiesel (570)</p> <p><u>The Diary of a Young Girl</u>, Anne Frank (1080)</p>

<sup>9</sup> This book is by a Latino author OR describes themes related to Latino heritage and culture.

<sup>1</sup> Teachers must include these Anchor Texts in their curriculum.

<sup>2</sup> Either work can be selected as the third anchor text for this grade.

<sup>3</sup> Teachers may select additional texts from the Text Bank to equal the minimum required reading range of 5-7 texts.

# PUC Core Literature Lists

Books that are **highlighted** = non fiction

9 <sup>th</sup> Grade (1050-1150) <i>The Journey to Adulthood</i>	10 <sup>th</sup> Grade (880-1090) <i>Our Ethical Identity</i>
<b>Anchor Texts<sup>1</sup>:</b> <u>To Kill A Mockingbird</u> , Lee Harper (870) <u>Lord of the Flies</u> , William Golding (770) <u>Romeo and Juliet</u> , William Shakespeare (NP)	<b>Anchor Texts<sup>1</sup>:</b> <u>Fahrenheit 451</u> , Ray Bradbury (840) <u>Merchant of Venice</u> or <u>Othello</u> , William Shakespeare <sup>3</sup>
<b>Text Bank<sup>2</sup>:</b> <u>No, No Boy</u> , John Okada (900) <u>The Lovely Bones</u> , Alice Sebold (890) <u>Siddhartha</u> , Herman Hesse (1010) <u>The Prince</u> , Nicolo Machiavelli (1350) <u>Animal Farm</u> , George Orwell (1170) Mythology, compilation <u>Song of the Hummingbird</u> , Graciela Limon (880) <sup>º</sup> <u>Taming of the Shrew</u> , William Shakespeare (NP) <u>Fences</u> , August Wilson (NP) <u>Time Machine</u> , H.G. Wells (1070) <u>Monster</u> , Walter Meyers (670) <u>Something Wicked This Way Comes</u> , Ray Bradbury (820) <u>Hitchhiker's Guide to the Galaxy</u> , Douglas Adams (1000) <u>Extremely Loud and Incredibly Close</u> , J. Saffron Foer (940) <u>The Curious Incident of the Dog in the Night Time</u> , Mark Haddon (1180) <u>13 Little Blue Envelopes</u> , Maureen Johnson (770) <u>A Great and Terrible Beauty</u> , Libba Bray (760) <u>Count of Monte-Cristo</u> , Alexandre Dumas (830) <u>Always Running</u> , Luis Rodriguez (870) <sup>º</sup> <u>Like Water for Chocolate</u> , Laura Esquivel (1030) <sup>º</sup>	<b>Text Bank<sup>2</sup>:</b> <u>1984</u> , Orwell George (1090) <u>The Jungle</u> , Upton Sinclair (1170) <u>All Quiet on the Western Front</u> , Erich Remarque (830) <u>Cyrano de Bergerac</u> , Edmond Rostand (NP) <u>The House of Spirits</u> , Isabel Allende (1280) <sup>º</sup> <u>Johnny Got His Gun</u> , Dalton Trumbo (970) <u>A Streetcar Named Desire</u> , Tennessee Williams (NP) <u>Rain of Gold</u> , Victor Villasenor (820) <sup>º</sup> <u>A Yellow Raft in Blue Water</u> , Michael Dorris (980) <u>The Death of Artemio Cruz</u> , Carlos Fuentes (1020) <sup>º</sup> <u>My Sister's Keeper</u> , Jodi Picoult <u>Pygmalion</u> , Charles Bernard Shaw (1340) <u>Slaughterhouse Five</u> , Kurt Vonnegut (850) <u>Ceremony</u> by Leslie Martin Silko (840) <u>One Hundred Years of Solitude</u> , Gabriel Garcia Marquez (1410) <sup>º</sup> <u>Things Fall Apart</u> , Chinua Achebe (890) <u>A Place Where the Sea Remembers</u> , Sandra Benitez (790) <sup>º</sup>

<sup>º</sup> This book is by a Latino author OR describes themes related to Latino heritage and culture.

<sup>1</sup> Teachers must include these Anchor Texts in their curriculum.

<sup>2</sup> Teachers may select additional texts from the Text Bank to equal the minimum required reading range of 5-7 texts.

<sup>3</sup> Either work can be selected as the third anchor text for 10<sup>th</sup> grade.

# PUC Core Literature Lists

Books that are **highlighted** = non fiction

11 <sup>th</sup> Grade (1100-1300) <i>Reality vs. Perception</i>	12 <sup>th</sup> Grade (1100-1300) <i>Focus on Rhetoric and Composition</i>
<b>Anchor Texts<sup>1</sup>:</b> <u>The Great Gatsby</u> , F. Scott Fitzgerald (1070) <u>Raisin in the Sun</u> , Lorraine Hansberry (NP) or <u>Their Eyes Were Watching God</u> , Zora Neale Hurston (1080) or <u>Beloved</u> , Toni Morrison (870) <sup>3</sup> <u>Death of a Salesman</u> , Arthur Miller (NP)	<b>Anchor Texts<sup>1</sup>:</b> <u>Frankenstein</u> , Mary Shelley <u>Much Ado About Nothing</u> or <u>Hamlet</u> , William Shakespeare (NP) Focus on Expository Text (Expository Reading and Writing Program),
<b>Text Bank<sup>2</sup>:</b> <u>The Catcher in the Rye</u> , J.D. Salinger (790) <u>Native Son</u> , Richard Wright (700) <u>Malcolm X</u> , Alex Haley and Betty Shabazz (1120) <u>The Sound of the Fury</u> , William Faulkner (870) <u>The Scarlet Letter</u> , Nathaniel Hawthorne (1340) <u>A Lesson before Dying</u> , Ernest Gaines (750) Excerpts from <u>Democracy in America</u> , Alexis De Toqueville (1310) <u>Color Purple</u> , Alice Walker (670) <u>On the Road</u> , Jack Kerouac (930) <u>Snow Falling on Cedars</u> , David Guterson (1080) <u>The Grapes of Wrath</u> , John Steinbeck (680) <u>Monkey Wrench Gang</u> , Edward Abbey (860) <u>Tempest</u> , William Shakespeare (NP) <u>MacBeth</u> , William Shakespeare (NP) <u>The Crucible</u> , Arthur Miller (1320) <u>And Still We Rise: The Trials and Triumphs of Twelve Gifted Inner-City High School Students</u> , Miles Corwin (NP) <sup>o</sup> <u>A Thousand Splendid Suns</u> , Khaled Hosseini (830)	<b>Text Bank<sup>2</sup>:</b> <u>The Things They Carried</u> , Tim O'Brien (880) <u>Water for Elephants</u> , Sara Gruen <u>Waiting for Godot</u> , Samuel Beckett (NP) <u>Into Thin Air</u> , Jon Krakauer (1320) <u>Kite Runner</u> , Khaled Hosseini (840) <u>The Glass Castle</u> , Jeannette Walls (1010) <u>Time Traveler's Wife</u> , Audrey Niffenegger (780) <u>The Bluest Eye</u> , Toni Morrison (920) <u>A Long Way Gone</u> , Ishmael Beah (920) <u>Hunger for Memory</u> , Richard Rodriguez (920) <sup>o</sup> <u>A Rumor of War</u> , Philip Caputo <u>The Color of Water</u> , James McBride (1240) <u>Life on the Color Line</u> , Gregory Howard Wilson (920) <u>Memoirs of a Geisha</u> , Arthur Golden (1000) <u>Funny In Farsi: A Memoir of Growing Up Iranian in America</u> , Firoozeh Dumas <u>Paradise Lost</u> , John Milton (NP) <u>Pride and Prejudice</u> , Jane Austen (1190) <u>Wuthering Heights</u> , Emily Bronte (1380) <u>Jane Eyre</u> , Emily Bronte (890) <u>Great Expectations</u> , Charles Dickens (1230) <u>Freakonomics</u> , Steven Levitt and Stephan Dubner (NP) <u>This Bridge Called My Back</u> , Gloria Anzaldua and Cherrie Moraga, eds.(NP) <sup>o</sup>

<sup>o</sup> This book is by a Latino author OR describes themes related to Latino heritage and culture.

<sup>1</sup> Teachers must include these Anchor Texts in their curriculum.

<sup>2</sup> Teachers may select additional texts from the Text Bank to equal the minimum required reading range of 5-7 texts.

<sup>3</sup> Any of these works can be selected as the second anchor text for 11<sup>th</sup> grade as they share the same themes.



# Appendix X

## Principal (Site-Based Instructional Leader) Job Description

Partnerships to Uplift Communities (PUC) is a non-profit charter school management organization designed to significantly increase college entrance and graduation rates for underserved students in Los Angeles and the San Fernando Valley.

Our mission at PUC Schools is to develop and manage high quality charter schools in densely populated urban communities with overcrowded and low achieving schools. We create school programs and cultures that result in college graduation for all students. We uplift and revitalize communities through the development of educational and other supportive partnerships.

### **Essential Duties and Responsibilities:**

#### **Academic**

- Be an instructional leader who will motivate, lead and mentor teachers to better instructional practice and increase content expertise by meeting the goals of the school wide improvement plan

#### **Individual Teacher Professional and Instructional Support**

- Review instructional documents and provide feedback to teachers
- Observe classroom performance and give constructive feedback
- Designing and reviewing progress towards Professional Growth Plan goals with teachers
- In collaboration with others, uses appropriate data to establish rigorous, concrete goals in the context of student achievement and instructional programs.

#### **School-wide Professional and Instructional Support**

- Uses research and/or best practices to drive decision making about the academic program
- Provide instructional resources to teachers
- Design & deliver Professional Development on an ongoing basis that is based on school improvement plan
- Facilitate weekly PD / Staff Meetings in alignment with school improvement plan and mission

#### **Individual Student Support**

- Design and evaluate student intervention plans (Academic & behavioral) (individual student, small group, school-wide)
- Attend IEP meetings, coordinate instructional actions by Resource Specialist and insure completion of IEP goals
- Facilitate FST meetings in absence of AP
- Design process for measuring and monitoring individual student growth (ie: student portfolio)

#### **School-wide program**

- Ensure academic program meets compliance regulations around credit and course requirement
- Design academic program that supports and promotes early college mission
- Design school improvement plan

#### **Organizational Practices**

- Be an organizational leader who will motivate, lead, and mentor those within the school community and who will collaborate with the home office in order to ensure effective fiscal and operational practices in support of the achievement of the school wide improvement plan

#### **Calendar**

- Develops and implements an ongoing process for assessing students' needs (including delivery of internal and external benchmarks)
- Create school calendar, bell schedule, and courses that meet PUC Schools requirements





## **Principal (site-based Instructional Leader)**

### **Stakeholder Events**

- Creates and facilitates School Site Advisory Council
- Responsible for design and facilitation of annual parent events (I.e., lottery, new student orientation, student-led conferences, etc.)

### **Personal Professional Growth**

- Attend weekly principals meetings including participation in Principals Course of Study (PCOS)

### **Human Resources**

- Work with Human Resources to manage all employee issues
- Delivers evaluation, feedback, and support to assistant principal
- Coordinate with Human Resources to recruit highly qualified teachers
- Delivers evaluation, feedback, and support for certificated staff in meeting common expectations (bi-annually)

### **Finance**

- Accountability for maintaining schools' budgets, allocating funds where they will most effective in alignment with approved budget guidelines.
- Support Assistant Principal in the development and execution of Fundraising Plan

### **Operations**

- Responsible for the achievement of student enrollment targets
- Responsible for design and implementation of plan for obtaining reimbursement payments for supplemental instruction (I.e. Summer school, intervention, extended school day)

### **School Culture**

- Be a cultural leader who will motivate, lead, and mentor the school community and leverage the outside community to increase academic and personal achievement in order to meet the goals set forth in the school wide improvement plan

### **Vision and Improvement**

- Promotes PUC Schools' values and vision while developing a sense of community in the school
- Articulates the desired school culture and provides evidence of success
- Communicates effectively to various stakeholders regarding progress towards goals outlined in School Improvement Plan

### **School Community**

- Fosters and establishes effective relationships with the staff, students, parents and peers
- Plan, Facilitate, attend school functions, such as parent meetings, open house, parent teacher conferences, etc.
- Provides leadership for assessing and developing processes for improving climate and culture.
- Systematically and fairly recognizes and celebrates accomplishments of staff and students
- Demonstrates visibility and engagement in the school community while being accessible and approachable to all stakeholders

### **Building Leadership and Accountability**



## **Principal (site-based Instructional Leader)**

- Mentor and develop teachers to become leaders in their classroom, school, and within the PUC network
- Develops an environment and processes for ongoing collaboration and reflective practices for all stakeholders

### **Outside Community**

- Build a network with peers, educational leaders and academic institutions to share ideas and best practices

### **Qualifications:**

- Masters degree (Preferred)
- Holds a current California credential. A clear Administrative credential preferred but not required.
- Bi-lingual desired but not required
- 5+ years of teaching experience
- Experience as a department chair, assistant principal or principal

### **Skills:**

- Detail oriented
- Ability to multi-task
- Interpersonal skills using tact, patience and courtesy
- Posses the skills to work independently as needed.
- Pays attention to detail
- Reflective learner and self-starter
- Excellent verbal and written communications skills
- Problem solver - get the job done - can-do attitude
- Be able to multi-task and follow through on projects from start to finish
- Knowledge of Microsoft Windows XP, Microsoft Office suite (emphasis on Excel) and Adobe Reader

### **Salary/Benefits:**

- Depends on experience
- Full benefits are offered (medical, dental, vision, and life)
- Voluntary benefits are offered to all employees

## Assistant Principal

Partnerships to Uplift Communities (PUC) is a non-profit charter school management organization designed to significantly increase college entrance and graduation rates for underserved students in Los Angeles and the San Fernando Valley. PUC operates a growing network of small, public charter schools and will create more schools in high-need communities in coming years.

Our mission at PUC Schools is to develop and manage high quality charter schools in densely populated urban communities with overcrowded and low achieving schools. We create school programs and cultures that result in college graduation for all students. We uplift and revitalize communities through the development of educational and other supportive partnerships.

### **Job Responsibilities:**

All functions of operations, including and not limited to...

#### **School-Students & Parents:**

- Plan and attend school events, such as back to school night, parent meetings, etc.
- Collaborate with respective parties (parents, students, etc) to coordinate school events such as dances, fund raisers, etc.
- Manage all student discipline matters, such as coordinating parent meetings ensuring the procedures are in compliance with district, legal and PUC policies.
- Attend IEP meetings in the absence of the Principal
- Coordinate field trips
- Coordinate student support systems
- Coordinate the student recruitment process
- Cover supervision as needed
- Oversee the Special Ed and After School program

#### **Classified Staff:**

- Supervise the classified staff
- Evaluate classified staff annually, set and monitor growth plans

#### **Supporting Instruction:**

- Collaborate and participate in classroom “Learning Walks” and observations
- Assist with facilitation of staff meetings
- Collaborate with the Principal on the design and delivery of PD
- Assist with preparation of school schedule

#### **Testing:**

- Ensure all demographic data is accurately entered into Power School
- Ensure all testing materials are ordered
- Coordinate internal assessment including the MAP and Math Assessments

#### **Finances:**

- Ensure all purchases and decisions are made within budget
- Advise the Principal on purchases
- Review the status of the budget on a regular basis. Approve all invoices prior to sending them to the office for payment.
- Lead all fund raising events
- Attend budget related meetings and trainings
- Ensure an adequate number of supplies are maintained

## Assistant Principal

Ensure staff works budgeted hours

### **Operations:**

- Ensure attendance procedures are adhered to and lunch counts are accurate.
- Attend all meetings and trainings related to operations
- Ensure the school is clean and safe of any hazards
- Work with the Operations team to address any facility needs such as repairs or new equipment
- Work with the IT team to address any technological needs or repairs
- Ensure the school is in compliance with risk management rules
- Ensure timesheets are accurate and turned in on time
- Work with HR for all new hires and terminations

### **Misc.:**

- Gather data and produce reports
- Ad hoc assignments

### **Qualifications:**

BA/BS  
Masters preferred  
Teaching Credential desired  
3-5 years of related experience desired  
Intermediate knowledge of MS Word and Excel  
Bi-lingual a plus

### **Skills:**

Great customer service skills  
Ability to multi-task  
Team player  
Excellent writing skills  
Results oriented  
Has proven leadership skills  
Ability to manage the ambiguity and multiple priorities inherent in an entrepreneurial environment.



## **DEAN OF STUDENTS**

**SUMMARY:** Responsible for implementing the school wide plan for creating a positive culture of behavior in the academy, as well as administering discipline in accordance with school policies.

### **ESSENTIAL FUNCTIONS**

- Provide and supervise in a fair and consistent manner effective discipline system with high standards, consistent with the philosophy, values, and mission of the school and organization, in accordance with due process and other laws and regulations.
- Manage and support all attendance matters and ensure the procedures are in compliance with district and PUC policies.
- Manage and coordinate FST meetings; co-facilitate with support from Instructional Leader.
- Coordinate IEP meetings; co-facilitate with instructional leader, and insure IEP meets state district policies
- Manages Peer Counseling / Mentoring program. (Peer mediation, mentoring, etc.)
- Team with teachers, staff, social worker, parent coordinator and curriculum and professional development coordinator in the development and implementation of the school-wide plan for creating a positive culture of behavior in the school
- Notify appropriate personnel and agencies immediately, and follow established procedures when there is evidence of substance abuse, child abuse, child neglect, severe medical or social conditions, potential suicide or individuals appearing to be under the influence of alcohol, controlled substances, or anabolic steroids.
- Display the highest ethical and professional behavior and standards when working with students, parents, school personnel, and agencies associated with the school.
- Meet with parents regarding student discipline and behavior issues.
- Ensures a safe, orderly environment that encourages students to take responsibility for behavior.
- Cover supervision as needed
- Coordinate student field trips and events
- Collaborate with students to coordinate school events such as dances, fund raisers, etc.
- Maintain positive, cooperative, and mutually supportive relationships with the central administration, parents, and representatives of resource agencies within the community.
- Other duties as assigned.

### **QUALIFICATIONS:**

- Masters preferred
- Teaching Credential desired
- 3-5 years of related experience desired
- Extensive knowledge of Special Education (Federal Rules & Regulations)
- Intermediate knowledge of MS Word and Excel
- Bi-lingual a plus
- Great customer service skills
- Ability to multi-task
- Team player
- Excellent writing skills
- Results oriented
- Has proven leadership skills
- Ability to manage the ambiguity and multiple priorities inherent in an entrepreneurial environment.

## NETWORK PORTFOLIO AND PERFORMANCE:

### 1. Portfolio of Schools (2 pages)

Please provide an overview of the schools/campuses within your portfolio. Please include the following:

- a. Number of school(s)/campus(es) and total number of students served;
- b. Cities or communities served
- c. Grade levels served;
- d. Unique school themes or models in your organization
- e. Type of schools in your portfolio (e.g., Charter, Network Partner, etc.)

The Partnership to Uplift Communities (PUC) opened its first school, Community Charter Middle School, in the Northeast San Fernando Valley in 1999. In the past ten years, PUC opened an additional 11 independent charter schools of which 6 are middle schools, 4 are high schools, and one is a K-5. Seven PUC schools are located in the Northeast San Fernando Valley, and 5 are in the area Northeast of Downtown LA, encompassing Cypress Park, Highland Park, Lincoln Heights, and Glassell Park. Approximately 3,200 students are being served by PUC schools as of November, 2010. The API at each of our schools surpasses that of the neighborhood schools and we have a waitlist of enthusiastic students for each site. The table below lists the name, population, location, and grade level of each of our schools.

School Name	Community/City Served	Grade Levels	Student Pop.	Unique School themes/models	year founded
Community Charter Middle School	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	6-8	326	Small class size, rich arts program, personalized assistance, extended instructional periods, no tracking, strong college-going culture, strong after school program	1999
CALS Charter Middle School	Northeast of downtown Los Angeles including Cypress Park, Highland Park, Lincoln Heights, and Glassell Park	6-8	310	Small class size, rich arts program, personalized assistance, extended instructional periods, no tracking, strong college-going culture, strong after school program, CA Distinguished School	2000
CALS Early College High School	Northeast of downtown Los Angeles including Cypress Park, Highland Park, Lincoln Heights, and Glassell Park	9-12	320	Early college high school program, strong college-going culture, no tracking, strong after school program, CA Distinguished School	2003
Lakeview Charter Academy	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	6-8	314	Teachers use gifted strategies with 100% of the students including special needs students 6th highest achieving middle school in Los Angeles.	2004
Milagro Charter School	Northeast of downtown Los Angeles including Cypress Park, Highland Park, Lincoln Heights, and Glassell Park	K-5	277	Dual language model. School ranks in top 6% of all Los Angeles elementary schools. College going culture beginning in Kindergarten.	2004
Community Charter Early College High School	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	9-12	449	Early college high school program, strong college-going culture, no tracking	2004
Excel Charter Academy	Northeast of downtown Los Angeles including Cypress Park, Highland Park, Lincoln Heights, and Glassell Park	6-8	333	Small class size, rich arts program, personalized assistance, extended instructional periods, no tracking, strong college-going culture, strong after school program	2006
Triumph Charter Academy	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	6-8	269	112 point gain on API in 2010. Small class size, extensive exposure to arts, personalized assistance, extended instructional periods, no tracking, strong college-going culture	2007
Santa Rosa Charter Academy	Northeast of downtown Los Angeles including Cypress Park, Highland Park, Lincoln Heights, and Glassell Park	6-8	195	Highest API score for a first year school in the history of PUC Schools. Small class size, extensive exposure to arts, personalized assistance, extended instructional periods, no tracking, strong college-going culture, strong after school program	2009
Nueva Esperanza Charter Academy	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	6-7	219	Second highest API score for a first year school in the history of PUC Schools. Small class size, extensive exposure to arts, personalized assistance, extended instructional periods, no tracking, strong college-going culture, strong after school program	2009
Triumph Charter High School	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	9	97	Early college high school program, strong college-going culture, no tracking, strong after school program	2010
Lakeview Charter High School	Northeast San Fernando Valley, including Pacoima, Arleta, Lakeview Terrace, Sylmar and San Fernando	9	98	Early college, strong college-going culture, no tracking, strong after school program	2010

All of our schools are small, nurturing communities of learners that share our design principles and are focused on our primary goal: preparing and inspiring our students and their families to apply, enroll and complete college. Innovative programs in our schools include Early College, Advisory system, Community Circle (TRIBES), arts and technology integration, and an ongoing analysis of data from student products (portfolios), benchmark assessments and standardized tests to drive instruction, curricula and professional development.

Our design principles are as follows:

**Design Area 1: Academic Program**

- 1) Honors-level program of study for all
- 2) Standards-based curriculum that holds all students to high expectations
- 3) Engaging instruction that emphasizes learning through inquiry
- 4) Academic catch-up program combining basic skills with advanced concepts
- 5) Differentiated instruction that meets the learning needs of each student
- 6) Immersion for English language learners and inclusion for special education students
- 7) School-wide literacy program across the curriculum
- 8) Daily schedule and yearly calendar structured to extend learning
- 9) Scaffolded exposure to college- level instruction and college courses

**Design Area 2: School Culture**

- 1) Clear student behavioral norms based on professional norms
- 2) Formal introduction and mentoring of new students
- 3) Faculty commitment to “break down” complex material
- 4) Multiple modes of academic support
- 5) Consistent adult modeling of core values
- 6) Faculty commitment to motivate and inspire students
- 7) Construction of peer culture that supports each other’s success
- 8) Family involvement that supports student success
- 9) University partnership that reinforces college-going culture

**Design Area 3: Organizational Practices**

- 1) Data- driven approach to curriculum, instruction, and school design
- 2) Hiring and development of faculty with skills and values to fulfill school mission
- 3) Shared leadership and collective decision-making
- 4) Student role in shaping school direction
- 5) Use of external standards to prevent erosion of internal standards
- 6) Development of common tools to ensure consistent academic expectations
- 7) Multi-faceted staff development that continuously improves teaching quality
- 8) Use of school- wide literacy program to focus staff on achieving school mission
- 9) Formal organizational arrangements that maximize college and university partnerships
- 10) Deployment of staff and other resources in flexible and creative ways
- 11) Leaders who serve as "keepers of the flame," reinforcing mission and culture



## 2.Portfolio Growth (2 pages)

*a. Describe the organization's proposed scope of growth over the next five years both in LAUSD and nationally (years, number and type of schools, target cities, etc.)*

PUC had set a goal of running 13-14 independent charter schools, serving our two regional bases: Northeast Los Angeles and Northeast San Fernando Valley. We currently operate 12 schools and consider our application for these proposed two charter high schools to be the final schools in our network. While a few of our schools still need to grow their populations to capacity, adding a new grade each year (two schools designated as high schools only have 9<sup>th</sup> grade students at this point in time), we do not intend to add additional schools at any time, in any location.

PUC co-founders have chosen these locations and this rate of growth for specific reasons. Dr. Ref Rodriguez grew up in the Northeast Los Angeles neighborhood and has spent his life committed to serving this community. Similarly, Dr. Jackie Elliot spent 20 years prior to starting a charter school working and serving the community of the Northeast San Fernando Valley. Each of the PUC schools was founded organically as a result of families requesting these programs. The shape of growth was a direct result of demand and supply: this fourth high school in the Valley will complete the pattern of four middle schools feeding into four high schools. In the Northeast Los Angeles area, other providers of innovative school programs have stepped in and PUC did not feel compelled to provide as comprehensive a line for student schooling.

*b. Provide evidence of your organization's capacity to manage multiple schools/campuses. For organizations that have not managed schools before, please provide evidence of your capacity to manage a school.*

Our Home Office and organizational structure has demonstrated capacity to manage multiple schools and campuses, as it has done for the past ten years. We have had clean audits every year. Eight of our schools – all of which are at least 2 years old are WASC accredited, two schools that are in their second year of existence are in the midst of the WASC accreditation process, and the newest two schools that opened in the fall 2010 will enter the process in 2011. Our annual surveys of stakeholders have produced a majority of positive responses, and we make it a practice to construct detailed action plans in response to even a small percentage of dissatisfied replies. Our schools graduate students at an average of 90% rate and, of these graduates, over 95% are accepted and enrolled in college. Our schools consistently outperform neighborhood schools and, when we encounter less-than-expected academic results, we develop aggressive action plans, re-examine student work and assessments, create professional development partnerships, alter curriculum and practices, increase support services and, in countless and creative ways, seek to improve student learning. We have won prestigious grants and awards. For example, CALS Early College High School was named a California Distinguished School in 2009 in recognition of the school's clinical counseling program and use of the Common Instructional Strategies as best practices. Milagro received both a California Distinguished School and a Title I Academic Achievement Award in 2010. Lakeview Charter Academy also received a Title I Academic Achievement Award in 2010. PUC Schools along with four other CMOs (Aspire, Alliance for College Ready Public Schools, Green Dot Public Schools, and ICEF) received a 60 million dollar award – THE COLLEGE READY PROMISE - from the Bill and Melinda Gates Foundation in order to increase teacher effectiveness in increasing the college readiness of students. The grant will enable the organizations to conduct the research necessary to develop a clear picture of what skills and characteristics are necessary in order to ensure that a student is actually college-ready. The grant will also enable the CMO's to research and develop a more efficient and meaningful teacher evaluation system that will be linked to performance and compensation.

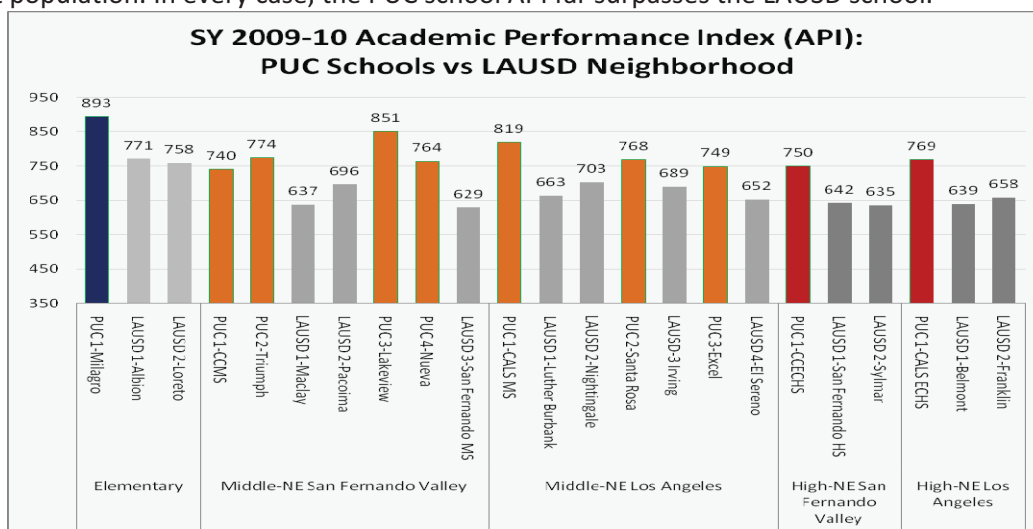


### 3. Performance Data (2 pages)

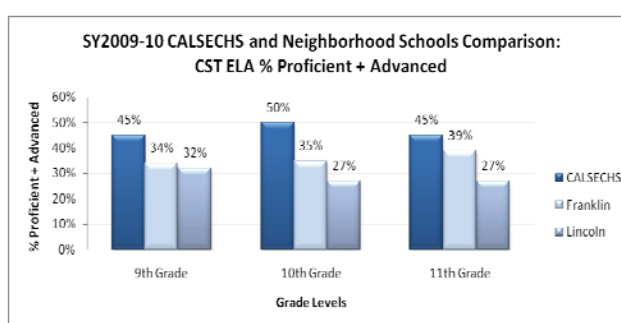
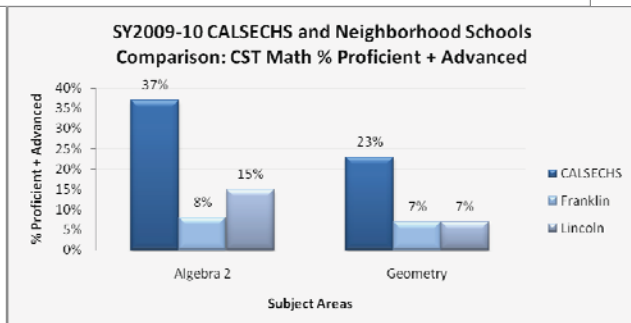
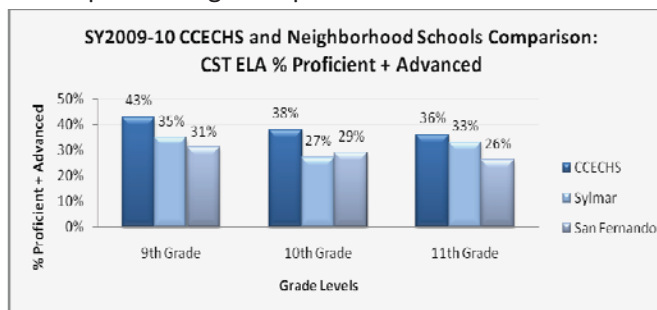
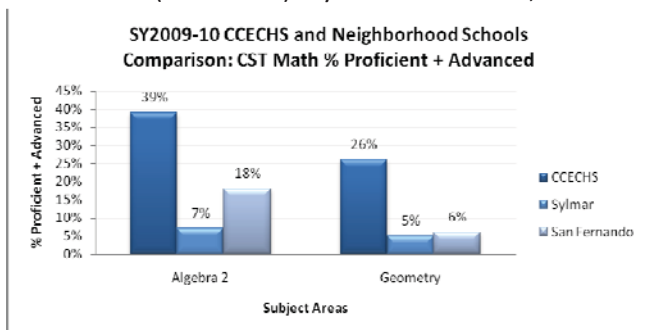
**a. Provide evidence of the organization's successful management of academic and non-academic operations of schools/campuses in your portfolio (e.g., professional development, back-office support, facilities maintenance). Please include evidence from performance data assessments that measure student growth and achievement in math and ELA. Include comparative local district data where available. For organizations that have not operated or managed a school before, but have run programs at schools, please speak to the impact of your programs on student achievement.**

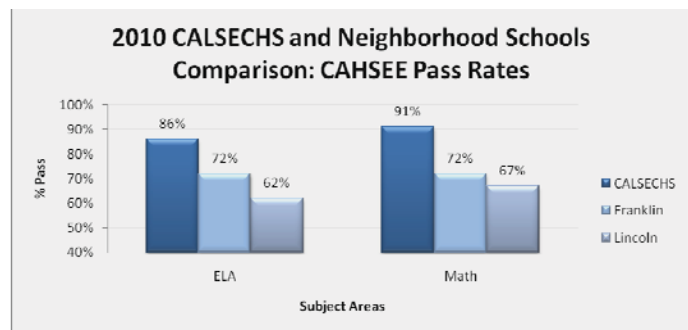
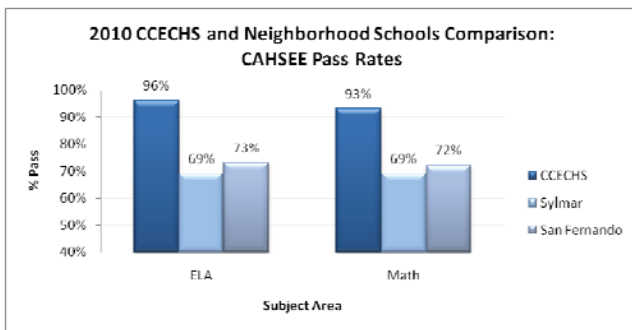
Evidence of PUC's successful management of academic and non-academic operations of its 12 schools to date can be found by analyzing student graduation rates (90%+), college acceptance and enrollment rates (90%+), performance on standardized tests and teacher-family-leader-stakeholder surveys. Clean audits, recognition of a high school last year as a California Distinguished School, full compliance with legal and fiscal requirements, and the list of grants won also help paint the picture of an organization that is well run and effective.

The following table demonstrates the API of PUC schools and the local alternatives serving the same student population. In every case, the PUC school API far surpasses the LAUSD school.

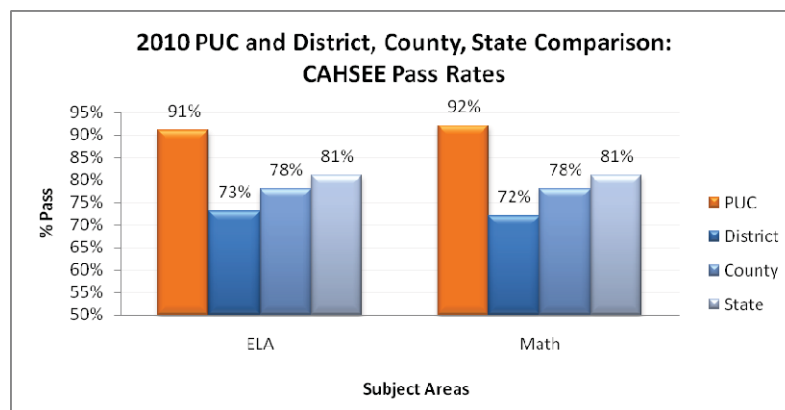


The tables below track student proficiency rates on CST ELA and Math exams, and CAHSEE pass rates, for Community Charter Early College High School (CCECHS) and CALS Early College High School (CALSECHS). By these measures, PUC students are outperforming their peers in the LAUSD schools.





The chart below displays data from our PUC schools in a larger context:



For a detailed analysis of the PUC schools' student achievement growth over time, please see **Appendix VIII**.

**b. Identify the key areas for improvement within your portfolio of schools and discuss how these are being addressed network-wide. If your organization does not operate multiple schools or campuses, please indicate the areas of improvement for the school you operate.**

PUC's strategic plan recently addressed the desire of the organization to improve its ability to reach a larger number of students by collaborating more closely with the District. To reach this goal, PUC is pursuing two school choice proposals, including this one. Another area targeted for improvement is our need to increase the college readiness of our students. We partnered with four other CMOs to create a plan and pursue a course of research and action regarding the improvement of teacher effectiveness as it relates to student achievement of college level skills. Funded by the Bill and Melinda Gates Foundation and called the College Ready Promise, we have already begun this process and would include this proposed school in the program.

## **ORGANIZATIONAL CAPACITY:**

### **1. Organizational Responsibilities and Goals (4 pages)**

a. *Describe the core functions of the organization in relation to the schools/campuses it operates or will operate both now and in five years.*

The core functions of the PUC organization in relation to the schools/campuses we currently operate will be the same for our proposed school. PUC has a home office team of 22 employees with extensive experience in charter school development, finance, facilities, curriculum & instruction, assessment, fundraising and governance. Our goal is to support the schools so comprehensively that the site-based staff is able to focus exclusively on the students and on teaching and learning. The role of the home office is to provide: back office support including payroll, local/state/federal compliance and health/welfare benefits processing; human resources services; curriculum development; faculty and leader recruitment and training; fundraising; operations and purchasing; facilities acquisition and maintenance; and other general administrative assistance including website maintenance, communications, food service support, billing for lunch program (which has become a revenue source as we provide Title I related services to non-PUC schools), et al. Additionally, student assessment data management systems are in place to inform the instructional practices at the site level.

The organization's Home Office Instructional Team (HOIT) is led by a Chief Academic Officer (CAO). An English Language Arts (ELA) lead provides leadership, support, and professional development regarding the implementation of PUC's English Language Arts initiatives (includes the implementation of a writing program PUC-wide, the effective use of literature, teaching reading strategies across the curriculum, meeting the needs of English language learners, and more). Two coaches support and augment the ELA lead with the design and implementation of the ELA strategic initiatives. An Induction Director designed and has implemented a high quality induction program for teachers who are completing their credentials (this program has been authorized by the state of California). A Data Analyst gathers and organizes student achievement data and helps leaders interpret the data in order to inform instructional decision making. Two Regional Directors (one for the Northeast San Fernando Valley schools and one for the Northeast Los Angeles schools) provide direct oversight for the schools in each of their respective geographic areas. An Implementation Lead works with the CAO, leaders, and school staff in the implementation of various aspects of The College Ready Promise. The HOIT leads the site-based Instructional Leaders in weekly professional development and in summer training. The site-based Instructional Leaders are given autonomy to design and implement professional development for each site's faculty, but collaborate with the HOIT and utilize their expertise as needed throughout the year. It is not unusual to see any member of the HOIT in the classroom, working directly with teachers, or at teacher meetings contributing to planning, delivery of professional development, and data analysis.

b. *Describe the organization's short- and long-term academic, financial, and operational goals.*

#### **PUC's Short-term Academic Goals include:**

##### **Increasing the number of minority students who complete high school**

Given our school population of 90% Latino, and our average graduation rate of 90%, this objective is met and will continue to be met as long as the school exists.

**Reaching an API of over 800 in all PUC schools by the fifth year of each school's operation**, sustainable over time due to well implemented systems and cultures of success. Our 10 schools for which data is available currently range from 740-893 API.

**Significantly raise the academic achievement within all PUC schools**, our data indicates that our students have been performing at increasingly higher achievement levels over time. Our data also indicates that we have improved greatly in ensuring that our students achieve well even in the first year

of operation. Among our specific goals in this area, we emphasize student growth by 1.5 years for students at the below proficient/below grade level.

**Form new and innovative partnerships involving institutions of higher education, community based organizations and schools in particular those within the LAUSD.**

New partnerships have been formed with: YouthSpeak, the Boys and Girls Club of the San Fernando Valley, and the Lakeview Neighborhood Improvement Association. We wish to continue building upon this to increase learning opportunities for our students and faculty.

**Develop a model secondary school design that accelerates the academic and interpersonal capacity of all students who may enter high school below grade level and lack solid academic skills.**

Our model emphasizes data driven instruction in a nurturing and college-going culture – we identify student’s deficiencies and create a plan for students to improve these areas through tapping into their strengths and providing one-on-one tutoring, differentiated instruction, variety of curricular resources, extended learning periods (zero periods, after-school, Saturdays and summers).

**Increase the number of students and families who perceive college attendance and a college degree as possible, legitimate and necessary aspirations.**

This objective continues to get easier each year with the alumni who return from college and talk with our families and students about their experiences. Originally this objective was a dream but is becoming a reality as measured by survey data of our families and students.

**PUC’s Long term Academic Goals include:**

**Increase the college graduation rate by 5 times in the communities we serve (Northeast San Fernando Valley and in Northeast Los Angeles)**

As our graduates enroll and eventually graduate from college, we hope to create a tipping point that will shift the composition of this community

**Sustaining an API of over 800 in all PUC schools over time,** which will occur as a result of well implemented systems and cultures of success.

**Significantly raise the academic college preparation levels for our entire student body.**

This goal will not be met until 100% of our students are proficient and advanced on all aspects of the CST and have competitive SAT/ACT scores. We have shown a continual increase in our academic preparation and believe that the adaptation of common effective teaching practices as well as our current involvement in the College Ready Promise grant will help us continue to work towards this goal.

**Continue to Form new and innovative partnerships involving institutions of higher education, community based organizations and schools in particular those within the LAUSD on an ongoing basis**

New partnerships will help ensure a sense of connectedness between the stakeholders in the school community and the greater community, will ensure greater resources and support services for students and their families, and will support students and their families in the establishment of strong roots within their communities

**Continue to refine our model secondary school design that accelerates the academic and interpersonal capacity of all students who may enter high school below grade level and lack solid academic skills.**

Through long term continual improvement that is student centered, we will continue to promote success and further increase student achievement.

**Continue to Increase the number of students and families who perceive college attendance and a college degree as possible, legitimate and necessary aspirations.**

We will continue to improve and reinforce our messaging, our parent- and student-education related to this, and remain student- and family-centered in our approach.

**Ease students’ transition from high school to institutions of higher education.**

We are still working on ways to ease this transition. All of our seniors complete at least one overnight college trip to learn more about college options but we know that this effort is not enough. We have

held alumni networking events where we encourage students attending the same college to meet, create support groups and check in on one another, but this effort requires more effort to build sustained relationships. We have also created a PUC protégés program in which teachers volunteer to mentor students attending college. This program is only as good as the mentor-alum relationship. Ultimately this objective is one that the school continues to work on by providing workshops geared specifically for our parents (in recognition of their evolving familiarity with American educational opportunities), seminars for our students, and counseling as needed.

**PUC's Long term financial goals include:**

By the time a PUC school is at enrollment capacity, the school will be self-sustaining on public dollars.

All PUC schools will receive good audits every year

All PUC schools will maintain a 5% reserve ongoing

All PUC schools will be responsible and accountable in all aspects of fiscal management

**PUC's Short term financial goals include:**

All PUC schools will all be within budget beginning in the first year of operation

All PUC schools will maintain a 5% reserve beginning in the first year of operation

All PUC schools will be responsible and accountable in all aspects of fiscal management beginning in the first year of operation

**PUC's Long term and Short term operational goals include:**

The PUC organization will operate efficiently (at all levels within the organization) through the development and implementation of sound, reliable systems

All leaders will receive training ongoing and as needed in order to ensure maximum efficiency in utilization of PUC's operation systems

*c. Discuss the organization's role in assessing overall performance at individual school(s)/campus(es), as well as the interventions the organization will use to promote continued improvement at each school/campus.*

The role of the organization in assessing overall performance at individual schools is clearly systematic and includes monthly reports and aggressive interventions as needed. Monthly reports are completed by the site-based Instructional Leader in collaboration with support from the Home Office (organization) and cover academic performance data in the form of updates on the School Success Plan and all areas of program evaluation including: finance, operations, Human Resources, Data Team/IT, Clinical Services and Business Development (Lunch Program, Attendance). The main means of assessing academic performance at each of the schools is the monthly updates to each school's "School Success Plan." In July, Instructional Leaders meet with HOIT and teachers to review the school's state testing results. They analyze the data to determine which sub-parts presented a struggle for students. Teachers meet within departments and revise scope and sequences from the year prior to address the areas where goals were not achieved. With these revised plans in hand, the Instructional Leaders create a draft of the School Success Plan, identifying the key results that will be measured through internal assessments at the school site over the course of the upcoming year. Throughout the school year, monthly data reports are generated to identify each school's progress in achieving the School Success Plan. Dashboards (see Appendix IV) provide detailed assessment data and can be readily shared with the organization and the Board. When there are discrepancies between where the school wishes its students to be and where the students are, HOIT works with the Instructional Leader to implement interventions in the form of professional development, curricular changes, teacher coaching, resource specialist support and student-specific plans of action. Interventions can also be more encompassing as,



for example, when a program was identified to specifically target high school English teaching to EL and when a program was identified to support teachers in filling student gaps in Algebra I. Depending on the specific gap identified, the organization will formulate a plan *the same month* the issue is identified and will be held accountable through monthly reports to the Board of Trustees.

## 2. Organizational Leadership (2 pages)

**a.** Describe the organization's leadership team and how reporting relationships in the organization will evolve with the addition of a new school(s)/campus(es). Describe any additional roles/positions that will be added to the organization to strengthen capacity to support school growth and reflect the school community you seek to serve. If you are an organization looking to operate schools for the first time, please discuss how your organization will staff up to support the new school.

- i. Attach job descriptions and resumes (where positions have been filled) for key organizational leadership roles (e.g. CEO, CAO, CFO, etc.) and label appropriately.
- ii. Attach an organizational chart that shows lines of authority among school leadership staff (e.g. Principal/instructional leader, operational leaders and other key leaders) and the oversight or advisory structure (including Board and/or other school advisory bodies) for the proposed school(s)/campus(es).

The organization's leadership team consists of two teams: 1) an Instructional Team with expertise related to teaching, learning, curriculum, assessments, and the effective use of data to inform all aspects of an instructional program and 2) an Operations/Finance/Human Resource/Administrative support team that manages all tasks related to site, compliance, back office, payroll/benefits/ etc. in order to ensure that all site-based Instructional Leaders can focus completely on the teaching and learning at the school site. Attached in Appendix II please find resumes and job descriptions. The only addition to the Home Office if the proposed school is created will be a Director of High Schools to augment the work of the existing Regional Directors. This High School Director will be an expert in all areas of high school operations and instruction.

The Organizational Chart can be found in **Appendix III**.

**b. Board Role:** Describe the roles and responsibilities of the Governing Board, including how often it will meet. In addition to legal and compliance considerations, please describe what contributions the Board will make to the long-term success and sustainability of the school, such as how it will monitor academic and operational aspects of the school.

Our proposed school is governed by the Board of Trustees of Partnerships to Uplift Communities – Los Angeles and consists of nine (9) regular members (maximum) plus one seat for the sponsoring district<sup>1</sup>. It is responsible for the governance, compliance and fiduciary health of the school. Board Meetings occur, per the language of the Bylaws in compliance with the provisions of the Brown Act, monthly. The Board establishes broad policies that affect all PUC-Los Angeles schools including staff hiring, benefits and compensation, conditions for student suspension or expulsion, controversial issues that affect more than one school site and teacher, and site principal and staff compensation criteria. Members of the Board also participate in raising funds, investing funds and increasing public awareness of PUC-Los Angeles' work. The Board has assisted, and will continue assisting, in the raising of capital for developing the centralized services which support schools and for identifying and securing financing for permanent sites. Finally, the Board provides an external group that assists with our organizational goal setting, monitoring programmatic implementation, and setting a strategic vision.

The PUC Board of Trustees monitors academic aspects of the school by holding the school accountable through the School Success Plan. This data-driven, detailed action plan is created each summer through a collaborative effort of each site-based Instructional Leader, faculty with support from the Home Office Instructional Team. The Board reviews monthly reports related to this plan. In addition, the Board

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<sup>1</sup> As required by law.

monitors operations and financial health of the school by forming an audit committee and ensuring a clean audit each year and by reviewing monthly data reports known as the Dashboard, covering HR, Finance, IT/Data, Clinical Services, and Business Development. A sample of this report can be found in Appendix IV.

**c. Board Structure:** *Describe the structure of the Governing Board at the proposed school, and identify any proposed Board committees and their roles.*

*i. Attach the By-laws of your school's Board or an outline of the same, and a copy of the Articles of Incorporation for the not-for-profit entity that will hold the charter for the school in the appendix.*

*ii. Attach proof of filing for 501(c)3 status by applying entity.*

The Board is led by Chairman John Biroc, Treasurer Ed Palmer, Secretary Jacqueline Elliott, and additional board member Dr. Jeanne Adams. Chairman Biroc brings clinical and educational expertise to the organization. He has received his Ph.D. in Counseling Psychology and a master's in Education from USC, and has been an adjunct professor at UCLA, CSUN, Pierce College and Antioch University. Ed Palmer, Senior Vice President of Industrial Services Group at Grubb & Ellis, brings finance and real estate expertise to the organization. Dr. Jeanne Adams brings educational and nonprofit board development expertise. A former teacher, professor and administrator, she has founded and served on the board of several high performing charters in Southern California, leading successful capital campaigns that resulted in quality permanent sites. Her multiple realms of expertise include education, finance, fundraising, nonprofit governance and development. Another multi-asset member of the board, Dr. Jacqueline Elliot has been a teacher, administrator and the visionary founder of PUC schools located in the Northeast San Fernando Valley. She brings expertise in education, governance, school finance and operations.

A standing audit committee exists and ad hoc committees are formed as needed.

Board member resumes, by-laws, Articles of Incorporation and proof of 501(c)3 status are in Appendices V and VI.

**d. Board Development:** *Identify the composition of the Governing Board, including key skills and constituencies that will be represented. If you are a new organization, provide a plan for recruiting a Governing Board representing a diverse skill set required for school oversight. Attach resumes of any Governing Board members who have already been identified. Label each resume as "Governing Board member."*

The current Board composition includes skill sets in governance, finance, real estate, education and fundraising – described in **section c.** above. All board members live and work in Los Angeles and are committed to the PUC mission and vision. The many community-based organizations (CBO) that have formed partnerships with PUC schools to provide mutually beneficial services and programs are not represented by leaders on the Board at this time, although this is a goal of the current board – to add CBO voices to the discussion in order to better serve the students and continually connect the school and the community.

## **INSTRUCTIONAL PROGRAM**

### **1. Curriculum (2 pages)**

*Describe the organization's role in developing curricula for the school(s)/campus(es) in your portfolio. Describe how the curriculum is or is not aligned across schools/campuses. If your organization is not currently operating or managing schools, please define what this process will look like.*

The curricula in all PUC schools are standards-aligned and our faculty utilizes our Design Principles (**section 1. Portfolio of Schools**) in developing scope and sequences, choosing curricula and implementing lesson plans. Since we believe in teacher autonomy and hire faculty whose professional expertise we respect and support, specific curricular resource choices are at the discretion of our faculty. Teachers submit their detailed scope and sequence to the site-based Instructional Leader (IL) and regularly review/analyze/edit this and their unit's lesson plans with the IL. These documents are also submitted to and examined by our Home Office Instructional Team to provide feedback and supply another positive contribution to each teacher's plans. The IL and Home Office Instructional Team members regularly examine student assessment data – including work products and portfolios –and analyze progress or deficits in correspondence with curricular and pedagogical choices. This analysis can lead to a degree of involvement from the organization in the development of curricula, however, it does not lead to PUC-wide mandates on curricula. At this time the only organization-wide curricular choice is in our choice of College Preparatory Math materials (CPM) for Algebra I because we determined that it was more effective with our particular student population.

## 2. School Culture and Climate (2 pages)

*Describe how the organization will transition the culture of the existing school(s)/campus(es) to the proposed new school(s)/campus(es). How will the organization leverage current expertise within existing school(s)/campus(es) to accomplish this transition?*

The culture and climate of a PUC school is a collaborative community of learners in which educators from the school site collaborate with the home office and with students and families in order to ensure that all students learn, graduate, and attend college. The rituals, routines, activities and structures that have been successful in introducing, building and maintaining such a nurturing and achievement-oriented culture at other PUC schools that serve the same specified region as this proposed school will be implemented here from the first orientation for families and faculty, as these practices have demonstrated effectiveness. We do not foresee any difficulties in transitioning families, students and faculty from the culture of their previous schools to the culture of ours as it is precisely our culture that will most attract them to our proposed school.

Our experience utilizing certain practices and the expertise of our faculty from nearby campuses, will be leveraged to accomplish this transition. We will introduce our practices in ways we have found successful in the past and we will pair new faculty with ‘mentor’ faculty from other campuses to support new faculty through this transition.

The practices we will utilize include the **Tribes Community Learning Circles**, **Early College** and **College Entry** programs, Advisory systems, Attendance policies and collaboration among all stakeholders.

The **Community Learning Circles** policy supports PUC schools in creating and sustaining an environment that provides a sense of belonging, support, connection to others and to ideas and values that make young lives meaningful. The Community Circle has demonstrated a positive impact on *achievement, motivation, personalization and safety* in our schools and in research studies across the country. Community Circles are introduced at the onset of school with students, and during Teacher Induction over the summer.

The Community Circle creates mini-communities -parents in classroom groups, teachers in faculty groups and students in cooperative learning groups - that use a series of collaborative skills and help each other honor four positive agreements (norms): attentive listening, appreciation/ no put-downs, the right to participate or to pass, and mutual respect. These norms assure appreciation for each person’s culture, race, gender, abilities, contributions and uniqueness. A sense of community becomes a reality as people work together on meaningful goals, tasks and challenges. No one is an isolate, no one fears to talk. It is safe enough to ask questions – safe enough to learn. Comprehensive studies indicate that cooperative group learning and the reflective practice improves student active learning.<sup>10</sup> It is compatible with how the human brain constructs, processes and retains information.

Students meet in a community circle regularly, enabling students and staff to begin the day in a positive and thoughtful manner where each voice is heard and respected. It also enables teachers to identify students who have arrived at school not feeling well, either physically or psychologically. The needs of these students are able to be identified and addressed immediately through one to one teacher/student discussions or referral to support personnel.

A **professional community of learners** is also inherent to our school structures as we have found that collaboration and sharing of best practices and expertise across schools, faculty, leaders and educational

experts results in increased *academic achievement* and *personalization* of the school experience for our students. Leaders from our schools meet weekly and receive support from the Home Office's Instructional Team as they design site-specific professional development for their teachers. This community of learners permeates the school culture and models collaboration for faculty and students.

Another essential aspect of our school culture that focuses on *academic achievement* and student *motivation to succeed* is our **College Entry** goal. All staff members possess a deep commitment to ensuring that each and every student not only graduates from the high school but also enters college. The school is small enough to allow staff members to work toward this goal by identifying student needs and addressing them through intervention in class, zero periods, seventh periods, lunchtime, extended day, Saturdays, and during the summer. This attention to students' individual needs develops their commitment to and love of learning and enables them to achieve grade level standards, high school graduation, and college entry.

We will promote our vision of college entry in the same ways as we have found successful on our other campuses: by discussing college goals on a daily basis, displaying college-related artifacts, prominently posting our mission and vision, designing our college center to be the heart of the campus and a favorite “hang out” spot for students. We post the names of students in the lobby of the school as they are accepted to college. Parents attend free workshops from the time their child enters high school in order to prepare them for their child's eventual entry into college. During their high school years, our students visit a number of colleges and universities in order to help them decide where they wish to apply.

In a community where the high school dropout rate exceeds 50%, the better than 90% graduation rate and college entry rate at our schools can no doubt be attributed to the college going culture and **Early College Program** that has been developed and so well established at our schools. Our **Early College Program** is described in greater detail below.

Another structure that has been successful in supporting our *student achievement* relates to our **Attendance Policies** which have enabled our schools to experience 96%+ attendance rates:

- Family members are required to call the school office if their child is absent.
- If a family fails to the school office before 11:00am, school staff calls home and/or work place.
- Grade levels achieving a month of 95%+ attendance are honored at Friday Celebration and granted free dress for the following Monday.
- Family's who struggle with regular attendance or multiple tardies meet with the administration to develop an action plan for improvement and support.

### 3. Data-Driven Instruction (2 pages)

*Describe the organization's role in reviewing performance data, and describe how this data is used to drive improvement at the school-, campus-, and network-levels. If your organization is not currently operating or managing schools, please define what this process will look like.*

The role of the organization in reviewing performance data and the way this data is used to drive improvement is described above in **Organizational Roles and Responsibilities, section c.** The organization creates the procedures and processes related to the creation and ongoing updates of each campus's School Success Plan. This plan includes:

- 1) Summer review of test results and the prior year's School Success Plan goals by teachers/administrators.
- 2) Analysis of these results in light of student grades and work products. For example, if a student passed a course but did not earn proficiency on the test, or vice versa, in-depth review takes place to uncover the cause for contrary results.
- 3) Teachers analyze data and alter their scope and sequence for the upcoming year to prevent similar shortfalls from occurring in the future.
- 4) This data review process also involves the organization's Home Office Instructional Team (HOIT) as an additional perspective and to guide teacher's changes to pedagogy and curriculum with the aim of driving improvement at the school-level for the following year.
- 5) An action plan with specified goals (called the School Success Plan) is drafted by the site-based Instructional Leader with input from all teachers and the HOIT.
- 6) Progress towards achievement of these goals is analyzed throughout the year through ongoing discussions involving teachers, administrators and the HOIT, focused on classroom assessment results, student work, benchmark assessment results, classroom observations, progress reports, semester grades, and finals.
- 7) When disconnects between goals and student performance occurs, the Instructional Leader receives input from the HOIT to support teachers in revising their plans and addressing students' learning gaps.
- 8) With each progress report and at the conclusion of each semester, teachers review data with students in order to analyze what is needed to increase student performance.
- 9) The Board of Trustees holds the organization accountable for each campus's progress by reviewing monthly updates of the School Success Plan and expecting the HOIT to intervene as needed.

This accountability process helps the entire organization and each school to be fully invested in the success of all students and always seek the road of improvement.



#### **4. Professional Development (2 pages)**

*a. Discuss the role of the organization in providing professional development for schools/campuses across the portfolio.*

The organization, through the Home Office Instructional Team (HOIT), is an active leader and collaborator with site-based Instructional Leaders and faculty, as described above. At every step along the way of analyzing, revising, implementing and updating the School Success Plan, the organization considers optimum ways of providing professional development targeted to student gaps. In fact, the very process of utilizing the School Success Plan is a form of professional development as the Instructional Leader guides the faculty in analyzing the school's results and the data and in constructing solutions. At the same time, the Instructional Leaders meet as a group, weekly, and are led by HOIT, in designing effective professional development programs that will support teachers in implementing effective, data-driven instruction. Data drives adjustments to professional development, just as it drives changes to curricular choices, pedagogy, and support services. Every time a gap between goals for student performance and actual student performance appears, discussion occurs as to the reason and the remedy.

When the collaborative process of teachers sharing expertise and the Instructional Leader or HOIT sharing expertise is not sufficient, other avenues of professional development are explored. For example, we partnered with CSU Northridge to train our English teachers in specific strategies to support students to pass the college entry-level English tests. Within this training, teachers learned new ways to teach writing and develop units that incorporate a significant amount of non-fiction text. As another example, teachers have participated in the Loyola Marymount University Math and Science Teacher program, which is a year-long PD. This PD was designed in modules and included a monthly training, observation and feedback in addition to on-going coaching designed around improving math instruction and making it more about proficiency based.

In addition to this focused approach to PD, teachers will meet with the PUC Home Office Instructional Team, Regional Director and the Instructional Leader on a regular basis to:

- Share teacher concerns
- Communicate teacher requests
- Articulate program progress and effectiveness
- Assess overall student progress, achievement and needs
- Discuss concerns regarding individual student progress and needs

To further support classroom instruction and resource students, teachers meet with the Resource Specialist who also conducts professional development sessions for staff throughout the year. During these meetings, the resource specialist discusses PD topics based on the disabilities represented in the school population. Teachers also discuss students with academic challenges who do not have an IEP and the types of interventions that can be used to support those students' academic challenges. A scope and sequence for professional development with the Resource Specialist is developed and given to all teachers for feedback.

*b. Describe how the organization will promote best practices sharing across the network.*

The practice of holding weekly meetings for all site-based Instructional Leaders, led by members of the Home Office Instructional Team, allows best practices to be shared and discussed. Depending on the

specific areas being targeted for development, teachers across campuses can come together to experience professional development programs together on or off-site and teachers can visit faculty on other campuses to share their own expertise as mentors, coaches, and facilitators of professional development experiences. At the foundation of our schools lies an emphasis on creating a collaborative community of learners. This culture fosters an ongoing dialogue between *all* teachers and school leaders, allowing us to rapidly share best practices. In fact, the CALS Early College High School was named a California Distinguished School in 2009 in recognition of the school's clinical counseling program and use of the *Common Instructional Strategies as best practices*.

**FINANCES: (5 pages total)**

**1. Financial Impact of Additional Schools/Campuses**

If you are adding schools to your existing portfolio of schools, describe how the organization's revenue and cost structure will be impacted.

**2. Fundraising**

Discuss how the organization is equipped to reach any associated fundraising goals related to operating a school(s)/campus(es).

**3. Audited Financial Statements**

If applicable, provide the last two years of audited financial statements for the organization.

**4. Profit and Losses/Revenue Sources**

Specify overall profits and losses for the organization over the last three years and identify how revenue sources support the general organization. Demonstrate the percentage of revenue used to support the central organization in comparison to the percentage used to support individual schools/campuses in the organization's portfolio.

**5. Internal Financial Controls:** Describe plans to ensure fiscal soundness and legal compliance for the proposed school. Specifically, address the financial monitoring process that will be used. Specify what financial reports will be generated and with what frequency, and identify the party responsible for generating these reports and his/her qualifications.

**Financial Impact of Additional Schools/Campuses**

Currently all schools in the PUC Schools portfolio are direct funded charter schools that receive State per pupil allocations per the charter school block grant formula. Federal program entitlements are received through the State and are applied for via the Consolidated Application. The new school campuses applied for through the Public School Choice (PSC) Resolution will not have a negative impact on the organization's overall revenue/cost structure because each school will be self-sustaining on public funding in its first year of operation. This is possible because, unlike the other schools in the organization's portfolio, PSC schools will not be required to pay up to 15% of revenue annually for facility costs. In addition, whereas a typical high school in the PUC portfolio grows one grade level at a time reaching capacity in its fourth year of operation, these schools will be at 75% capacity in year one and 100% capacity by year two mitigating some of the financial challenges from growing one grade level at a time.

**Fundraising**

Although we have budgeted \$500,000 per school from the Public Charter Schools Grant Program to be received over a three year period, each of the schools is able to sustain itself on public funding beginning in its first year of operation. PUC Schools lean home office staffing model and lean school site administrative model, ensures fiscal viability without sacrificing the instructional program. Below is the anticipated revenue and expenses per year for the first three years of operation **excluding funds from the Public Charter Schools Grant Program.**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Revenue	3,008,396	4,016,381	4,026,661
Expenses	<u>3,004,083</u>	<u>3,701,674</u>	<u>3,802,054</u>
Net	4,313	314,707	224,607

## Audited Financial Statements

Please refer to the attached audited financial statements for the last two fiscal years.

### Profit and Losses/Revenue Sources

In the interest of ensuring high quality programs, the founders of PUC Schools have been extremely conservative in growing and have stayed away from relying on philanthropic support to sustain schools after they reach enrollment capacity. As a result, more than 95% of revenue comes from public sources (i.e. state, federal, and local). Philanthropic support has never been more than 5% of the organization's overall operating budget and has exclusively been used to either 1) support facilities costs for new schools or 2) cover operating expenses in schools that have not yet reached full enrollment and are, therefore, not yet at sustainable, economies-of-scale funding levels.

Each of the schools in the network contributes 7% of revenue for home office operations. 93% of revenue remains at the school site and is used for school based and programmatic operations. Funds from one school are NOT utilized to offset higher costs for facilities or personnel at another school site. In order to maintain transparency, the organization's audit report contains a balance sheet, income statement, and statement of activities for each individual school.

In spite of the devastating cuts in funding over the last three years, PUC Schools remains a fiscally healthy organization. In fiscal year ending June 30, 2008, PUC added \$979,000 dollars to its overall net assets. In fiscal year ending June 30, 2009, PUC added more than 2.4 million to the overall net assets in large part due to two revenue sources: philanthropic support and funds received from the federal government through the American Recovery and Reinvestment Act. Anticipating further cuts in fiscal year ending June 30, 2010, the Board permitted the schools to utilize their ARRA funds and some of the philanthropic support received in FY 2009 for operations. Hence the 2.2 million dollar loss reported in FY 2010. The Board has approved a balanced budget in fiscal year ending June 30, 2011.

	<b>FY 2008</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>Projected FY 2011</b>
Revenue	20,508,494	24,209,045	25,407,586	32,022,967
Expenses	<u>19,529,117</u>	<u>21,754,237</u>	<u>27,674,466</u>	<u>32,014,767</u>
	979,377	2,454,808	-2,266,880	8,200
Net Assets at Beginning of the Year	3,689,870	4,669,247	7,124,055	4,857,175
Change in Net Assets	<u>979,377</u>	<u>2,454,808</u>	<u>-2,266,880</u>	<u>8,200</u>
Net Assets at Fiscal Year's End	<u><u>4,669,247</u></u>	<u><u>7,124,055</u></u>	<u><u>4,857,175</u></u>	<u><u>4,865,375</u></u>

### Internal Financial Controls

The Board of Trustees for PUC Schools is ultimately responsible for ensuring the organization is fiscally solvent, meeting the terms of the charter, complying with all federal, state, and local mandates, and

meeting short and long term goals. The Board delegates day to day responsibility for operations to the PUC Schools CEO who in turn delegates school based operations to the school leaders with appropriate oversight by the Regional Directors.

To ensure appropriate fiscal oversight, a system of internal controls has been instituted and is maintained by the head of the accounting department of the PUC Schools home office, with direct oversight by the managing director and the PUC Schools CEO. The accounting department is responsible for developing and updating the system of financial controls manual and training personnel to ensure the system of controls is maintained. We recognize that sound internal controls are essential to the school's accountability. Internal controls is a combination of systems and methods designed to provide the school community with reasonable assurance that (1) the assets and resources of the school are protected and losses minimized; (2) the accounting records are reliable and accurate; (3) District, County and CDE audit and accounting requirements are met; (4) proper authorization and certification for financial transactions are provided; (5) operational efficiency is promoted. The home office managing director ensures proper control procedures are established by means of appropriate segregation of financial responsibilities. The school personnel is required to adhere to a system for authorizing and recording transactions which includes clear management/audit trails and adequate control over assets, liabilities, revenues and expenses.

Annual financial planning and budgeting is a collaborative effort between the accounting department under the direction of the home office managing director and the school based leadership team. This enables schools to make maximum use of financial resources when planning for desired educational outcomes. Staff and community representatives are invited to participate at various stages of the financial planning and management process. Each year, schools develop a financial plan, which includes an annual budget formulated in accordance with the objectives and priorities specified in the school's charter and internal assessments. Once the school site has endorsed the budget, it is reviewed by the PUC Schools CEO and Board Treasurer and then submitted to the Board of Trustees for adoption.

The accounting department generates financial reports on a monthly basis which are reviewed with the school leadership team to prevent cost over-runs. The PUC Schools CEO and Board Treasurer review each of the school's financial reports on a monthly basis. On a quarterly basis, financial reports are prepared and submitted to the Board of Trustees. These reports include budget vs. actuals, profit and loss statements, statement of cash flows, and the balance sheet.

To further ensure integrity in the organization's accounting reporting system an external consultant works with the home office managing director and the head of accounting. Currently PUC utilizes the Charter School Management Corporation (CSMC) and CharterWorks as external consultants who support and provide a critical eye to the PUC management team. A staff member from the Charter School Management Corporation closes books on a monthly basis and creates the financial reports that are reviewed by the PUC CEO and Board Treasurer. The CSMC staff person also works with the home office managing director to prepare the quarterly financial statements that are submitted for review to the Board of Trustees.

An independent financial audit is conducted annually by an auditor who is familiar with California Public School accounting procedures and public school finances each year. The annual audit, at a minimum, verifies the accuracy of the organization's financial statements, revenue related data collection and reporting practices, and examine the schools' internal financial and attendance reporting controls. The annual audit is completed no later than four months after the close of the fiscal year (June 30) and a copy of the auditor's findings are forwarded to the chief financial officer of the Los Angeles Unified School District, LA County Office of Education and the California Department of Education and the State Controller. The school's audit committee reviews the audited financial statements and any audit

exceptions or deficiencies and report to the full Board of Trustees with recommendations on how to resolve them. The Board reports to the charter-granting agency regarding how the exceptions and deficiencies have been or will be resolved. The CEO ensures that exceptions and deficiencies are resolved to the satisfaction of the Board of Trustees, the sponsoring district, the County Office of Education and the State Controller and California Department of Education.

In addition, the following reports are submitted to LAUSD, in the required format and within timelines to be specified by LAUSD each year:

- a. Provisional Budget – Spring prior to operating fiscal year
- b. Final Budget – August of the budget fiscal year
- c. First Interim Projections – November of operating fiscal year
- d. Second Interim Projections – February of operating fiscal year
- e. Unaudited Actuals – July following the end of the fiscal year
- f. Audited Actuals – November following the end of the fiscal year
- g. Classification Report – monthly the Monday after close of the last day of the school month
- h. Statistical Report – monthly the Friday after the last day of the school month. In addition:
  - P1, first week of January
  - P2, first week of April
- i. Bell Schedule – annually by November
- j. Other reports

## APPENDIX II

### KEY ORGANIZATIONAL LEADERSHIP ROLES

**Attached you will find the resumes for:**

#### **LEADERSHIP TEAM:**

Jacqueline Elliot

**Jacqueline Elliot, Ed.D, Co-Founder and Chief Executive Officer**

Dr. Elliot has been dedicated to public school reform since 1986 when she first became a teacher in Pacoima, California. She holds a B.A. in Anthropology, a Multiple Subjects Teaching Credential, an Administrative Credential, a Master's degree in Educational Administration and a doctorate in Educational Leadership and Change. As a former LAUSD employee, Jacqueline Elliot was driven by an intense desire to improve the state of public education.

In addition to serving as CEO of PUC, Dr. Elliot currently serves as an elected representative to the California Charter Schools Association Membership Council and also serves on the Association's 501C4 board. In addition, she serves on the board of the Multicultural Learning Center, a charter school in Canoga Park, California. Dr. Elliot is also an adjunct professor in the Education Department at Loyola Marymount University.

Ref Rodriguez

**Ref Rodriguez, Ed.D. President & CEO, Partners for Developing Futures, Co-Founder and Corporate Treasurer**

Dr. Rodriguez is President and CEO of *Partners for Developing Futures (Partners)*. Partners is a social venture investment fund that primarily invests in high-potential, early-stage minority-led charter schools and charter school networks that serve underserved students. Partners' mission is to efficiently identify, recruit, and support leaders of color in creating and growing high-quality charter schools and charter school networks.

Prior to joining Partners, Ref was Co-Chief Executive Officer of Partnerships to Uplift Communities (PUC), a charter school management organization serving communities in the Northeast San Fernando Valley and Northeast Los Angeles.

#### **INSTRUCTIONAL TEAM:**

Chief Academic Officer, Kelly Montes de Oca

Regional Director, LA PUC Schools, Nik Orlando

Regional Director, Valley PUC Schools, Ed Vandenberg

Induction Director, Glenda Aleman

Implementation Coach, Lara Goldstone

Implementation Coach, Victoria Harvey

Implementation Lead, Pagee Cheung

Instructional Coach, Lisa Tremain

Data Architect, Manish Narayan

Data Analyst, Matt Goodlaw

**Job Description attached for the only new position to the Organization if proposed school opens:**

- High School Director



## KELLY MONTES DE OCA

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### **EDUCATION:**

1990-Present: Professional growth and development through active conference attendance.

1996-1997: MA, Educational Technology and California Clear Credential, Graduate School of Education, Azusa Pacific University.

1986-1991: BA, General Studies of Education and California Preliminary Credential, University of Southern California, School of Education.

### **PROFESSIONAL EXPERIENCE:**

9/09 – Present: Adjunct Professor, School of Education, University of California San Diego Extension, San Diego, California

9/06 – Present: Adjunct Professor, School of Education, Loyola Marymount University, Los Angeles, California

8/10 – Present: Chief Academic Officer, PUC Schools, Burbank, California

Responsibilities include oversight of Instructional Team, designing delivering professional development, design and facilitation of the PUC Principals' Course of Study, co-design and coaching around school improvement plans, design and coordination of network-wide data analysis, including an in-house assessment system in the areas of Math and Language Arts in addition to annual CST data, development and facilitation of a network-wide New Teacher Mentor program, and support of site principals related to teacher evaluation.

9/03 – 8/10: Sr. Director of Leadership in Curriculum and Instruction, PUC Schools, Burbank, California

Responsibilities include designing and delivering professional development for the schools in the PUC network, design and facilitation of the PUC Principals' Course of Study, co-design and coaching around school improvement plans, design and coordination of network-wide data analysis, including an in-house assessment system in the areas of Math and Language Arts in addition to annual CST data, development and facilitation of a network-wide New Teacher Mentor program, and support of site principals related to teacher evaluation.

2/02 – 9/03: Instructional Coach, Curriculum Designer/Writer, The Galef Institute, Los Angeles, California

Coaching responsibilities included designing and implementing an on-going school reform program for elementary and middle school based on The Galef Institute model. Work with the schools included designing and delivering professional development

workshops, mentoring teachers, modeling lessons, and tracking progress of school improvement.

Curriculum responsibilities included designing units and exemplary lessons to be used in both elementary and middle schools nation-wide.

6/01 – 12/01: Manager of Content and Professional Development, K12, Inc., McLean, Virginia/ Los Angeles, California

Responsibilities included designing and delivering training for K12 Virtual Charter School teachers nationwide, development and authoring of a Teacher Binder to accompany training, and working remotely to establish and maintain relationships with the teachers and administrators of the Virtual Charter Schools.

1999 –6/01: Certificated teaching position, 4<sup>th</sup> grade, Bradoaks Elementary School, Monrovia, California

GATE Specialist, Monrovia Unified School District Office, Responsibilities included designing GATE plan for the district, designing curriculum for 5<sup>th</sup> and 6<sup>th</sup> grade pull-out program, assuming all administrative duties directly related to GATE program (parent communication, state applications, program scheduling, communication with school sites, etc.); implementing staff development for the district in the area of gifted education and differentiation in the classroom.

Standards Consultant, Monrovia Unified School District Office, Responsibilities included working with one elementary school and one middle school to develop standards-based yearlong plans, including aligned instruction and assessments.

1997- 1999: Selected to participate on MBUSD “Think Tank” for Staff Development. Responsible for chairing the subcommittee for technology and developing staff development opportunities in this area.

Member of MBUSD Technology Curriculum Committee. Selected as a member of a technology sub committee. Responsible for finalizing district technology standards and action plans.

1996-1999: Gifted and Talented Education Coordinator, Manhattan Beach Unified School District. Responsibilities include designing the curriculum for and teaching the 4<sup>th</sup>-6<sup>th</sup> grade pull-out program; collaboratively coordinating activities and curriculum design for the Manhattan Beach Intermediate; assuming all administrative duties directly related to GATE program (parent communication, state applications, program scheduling, communication with school sites, etc.); implementing staff development for the district in the area of gifted education and differentiation in the classroom.

1996: South Bay Adult School, Curriculum and Technology Director, SAMS (Summer Academy for Math and Science). Responsible for designing the curriculum for all classrooms (1<sup>st</sup>-5<sup>th</sup>), training and mentoring teachers in the classroom, and directing the technology portion of the summer session.

Master teacher for USC student teachers.

- 1995-1996: Selected by ADTECH to pilot new software, Pathfinder, to create a user-friendly environment on the Internet for educators
- Grant Manager for Grand View's SB1510 grant. Responsible for ordering materials, following budgetary guidelines, staff training and grant implementation.
- 1995: Writer and recipient of the SB1510 School based technology grant for Grand View Elementary School.

**PROFESSIONAL EXPERIENCE CONTNUED:**

- 1994-1996:     Certificated teaching position, 4<sup>th</sup> grade, Grand View Elementary School, Manhattan Beach, California
- Author of Grand View Elementary's Technology Use Plan. Responsible for mentoring colleagues in grade level technology plans. An increase in integrated technology use at this site was directly correlated to the implementation and staff training related to this plan.
- Member of writing team and recipient of the California Distinguished Schools Award at Grand View Elementary.
- 1994:           Charter member of the Lawndale School District technology planning committee. Responsible for creating a vision for technology use in Lawndale Schools and beginning plans to apply for the ADTECH Consortium.
- 1993-1994:     Mentor teacher, Lawndale Unified School District. Responsible for designing and organizing a video books program for the elementary schools.
- Organized a teaching team of four teachers at Will Rogers Intermediate School. Designed curriculum for the team including a yearlong interdisciplinary thematic unit on CONFLICT.
- 1992-1994:     Active member of school site and district grant writing teams. Experienced in writing curriculum, restructuring, technology and Department of Justice grants.
- Certificated teaching position, 7<sup>th</sup> and 8<sup>th</sup> grade Language Arts and Art History, Will Rogers Intermediate School, Lawndale, California.
- 1992:           Completed TESA (Teacher Expectation and Student Achievement) courses.
- 1991-1994:     Lead teacher for Homework Helpers, a 3<sup>rd</sup> – 5<sup>th</sup> grade after-school tutoring program for Lawndale students. Trained and supervised high school tutors.
- 1991-1992:     Participated in the TEAMS (Telecommunications Education Applied to Math and Science) program. Organized and implemented both programs for my classroom. Responsible for distributing lessons and providing training to other teachers on site.
- Participated in a collaborative teaching pilot at Mark Twain School, in-class collaboration with resource and speech specialists focusing on target students - an alternative to the traditional pull out program.
- Certificated teaching position, 5<sup>th</sup> grade, Mark Twain Elementary School, Lawndale, California

**PROFESSIONAL ORGANIZATIONS:**

Association for Supervision and Curriculum Development  
California Association for the Gifted  
Professional Advocates for Gifted Education  
Computer Using Educators

## KELLY MONTES DE OCA

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### **CONSULTING EXPERIENCE:**

#### **District:**

1999-Present: Workshop leader for Bradoaks Elementary, designed and facilitated 5-day workshop with on-going staff development in the area of standards aligned curriculum and year long planning, including bundling skills into 9 week sections for accountable assessment across grade levels.

GATE Consultant, Monrovia Unified School District Office, Responsibilities included designing GATE plan for the district, designing curriculum for 5<sup>th</sup> and 6<sup>th</sup> grade pull-out program, assuming all administrative duties directly related to GATE program (parent communication, state applications, program scheduling, communication with school sites, etc.); implementing staff development for the district in the area of gifted education and differentiation in the classroom, and designing a parent education program.

1999 – 2000: Member of district writing team; responsible for organizing a district wide writing assessment program including designing prompts and organizing assessment and scoring procedures for K – 12 district writing assessment.

Speaker, Monrovia Unified School District Administrative Retreat; Topic: Standards Alignment and Accountability through yearlong planning.

1997-1999: Unified kindergarten curriculum by encouraging the grade level district wide to incorporate the universal theme of PATTERNS. Designed curriculum for the grade level and mentored teachers individually in the implementation of the theme. Secured a commitment from grade level teams at two school sites for 2<sup>nd</sup> and 5<sup>th</sup> grade participation in integrating a universal theme into their curriculum.

1995-1999: Workshop Leader, Provided on-going support for MBUSD staff development in the following areas: Differentiating the Curriculum in the Classroom, Characteristics of the Gifted Learner, and Hyper Studio.

#### **State:**

1999- Present: Consultant, Oceanside Unified School District and Escondido Unified School District; Responsibilities include the design and facilitation of long-term staff development in the area of interdisciplinary curriculum, differentiated curriculum, program design and parent education.

1997-1999: Consultant, University of Southern California and California Department of Education; One of twenty trainers selected in the state of California to participate in a Javitz Grant.

Responsible for developing curriculum and mentoring teachers in the implementation of differentiated curriculum.

**State (continued):**

- 1998: Substitute, University of Southern California, School of Education, Graduate Educational Methods class, Dr. Sandy Kaplan, Ph.D., clinical professor.
- 1998: Workshop Leader, California Association for the Gifted State Conference, Anaheim, California; “Exemplary Lessons Using Depth and Complexity”. Modeled a lesson with local students for workshop participants.
- Workshop Leader, Professional Advocates for Gifted Education Conference, Los Angeles, California; “Using Technology to Integrate Depth and Complexity into the Curriculum”.
- 1997-1998: Consultant, University of San Diego Extension, Collaboratively taught a Gifted and Talented Certification class for all GATE instructors (K-12) for Lynwood School District with Dr. Sandy Kaplan, Ph.D.
- 1997 -1999: CAG (California Association for the Gifted) Trainer: Summer CAG Institutes, Tustin, Sacramento, and Santa Barbara, California. Responsible for designing and implementing model lessons as a demonstration teacher for the institute participants and leading a conference style lecture to the participants (approximately 200) in the areas of differentiating the curriculum with depth, complexity, novelty and acceleration. Participants of the conference ranged from administrators, program coordinators, and K-12 teachers.
- Workshop Leader, California Association for the Gifted State Conference, Sacramento, California, “Using Technology to Integrate Depth and Complexity into the Curriculum”.
- 1993: Workshop Leader, California League of Middle Schools, “Using Interdisciplinary Thematic Instruction.”

**National:**

- 2000 –2001: Consultant, Interdisciplinary Curriculum Project, SVC XII, Austin, Texas. Responsibilities include teacher observation, teacher mentoring, and speaker at annual conference of teachers at Texas State Mentor Schools.
- 1998-Present: Consultant, Regional Service Center XIII, Austin, Texas. Responsible for designing and implementing model lessons as a demonstration teacher for the annual summer demonstration school for institute participants, modeling the integration of technology into instruction, and leading conference style lecture to the participants in the areas of differentiating the curriculum with depth, complexity, novelty and acceleration.
- 1998: Consultant, North Carolina, Responsible for designing and implementing model lessons as a demonstration teacher for the institute participants, modeling the integration of technology into instruction, and leading conference style lecture to the participants in the areas of differentiating the curriculum with depth, complexity, novelty and acceleration.





Nicolas Orlando

## **Professional Experience**

*Regional Director Los Angeles Schools*

PUC Schools, Burbank, California, 2007-present

*University Supervisor*

Loyola Marymount University, Los Angeles, California 2007-present

### **Principal**

CALS Charter Middle School, Los Angeles, California, 2003-2007

### **Teacher**

CALS Charter Middle School, Los Angeles, California, 2001-2003

### **Teacher/Administrator**

Constellation Community Middle School, Long Beach, California, 1998-2001

### **Substitute Teacher**

Long Beach Unified School District, Long Beach, California, 1997-1998.

### **Manager/Waiter**

Buon Gusto Trattoria, Long Beach, California, 1990-1998.

### **Designer**

Beyond Design, Huntington Beach, California, 1994-1997.

### **Gallery Coordinator**

Long Beach Arts, Long Beach, California, 1994-1995.

## **Education**

2005	M.A., Collaborative Educational Leadership, Fielding University.
2000	Multiple Subject Credential with CLAD, California State University at Long Beach.
1996	B.A., Art, California State University at Long Beach.

## **Accomplishments and Awards**

- |              |  |
|--------------|--|
| 2007         | Inspiration Award. PUC Schools. The award is presented to individuals who demonstrate and live the mission and vision of PUC Schools.  |
| 2004-present | Member Northeast Educational Strategy Group. Current board member of ESG Foundation.   |
| 2003         | CANEC Regional Coordinator. Represented the Los Angeles Region for Charter Schools within the California Network for Educational Charters, now California Charter School Association (CCSA). |
| 2000         | Production Designer, Fox Movie Channel. Designed interiors of wrap-arounds for April Fool's movie marathon.  |
| 2000         | Production Designer, "TEEN" Magazine. Mandy Moore Cover. January 2001 issue.   |

## **Grants**

- |      |   |
|------|---|
| 2001 | Smithsonian Week. Constellation Community Middle School was a selected school for a visit by renowned marine biologist Clyde Roper. |
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## **Presentations**

- |      |   |
|------|---|
| 2009 | Dublin, Ireland. Conference. Community Based Learning/Reciprocal Engagement             |
| 2007 | Occidental College. Conference: Community Based Learning.                               |
| 2003 | CANEC (Now California Charter Schools Association CCSA). Writing Across the Curriculum. |
| 2001 | CANEC (CCSA). Character Building.   |

# Edward Vandenberg

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<b>Experience</b>	2008 - Present	PUC Schools	San Fernando Valley, CA
	<b>Regional Director</b>		
	<ul style="list-style-type: none"><li>▪ <i>Coach and manage Principals and Assistant Principals of 4 charter middle schools and 3 charter high schools.</i></li><li>▪ <i>Create Standard Operating Procedures for growing charter organization.</i></li></ul>		
	2007 - 2008	Youth Policy Institute	Pacoima, CA
	<b>Leadership Consultant</b>		
	<ul style="list-style-type: none"><li>▪ <i>Design and implement leadership learning experiences for after school program coordinators stationed at middle and high school throughout the San Fernando Valley and Los Angeles.</i></li></ul>		
	2007 - 2008	PUC Schools	San Fernando Valley, CA
	<b>Leadership Coach</b>		
	<ul style="list-style-type: none"><li>▪ <i>Coach Principals and Assistant Principals of 3 charter middle schools and 1 charter high school..</i></li></ul>		
	2004 - 2007	Lakeview Charter Academy	San Fernando, CA
	<b>Principal</b>		
	<ul style="list-style-type: none"><li>▪ <i>Instructional and operational leader of start-up charter middle school.</i></li><li>▪ <i>School achieved an API of 754 in the second year of operation.</i></li></ul>		
	2003 - 04	Community Charter Middle School	San Fernando, CA
	<b>Site Leader</b>		
	<ul style="list-style-type: none"><li>▪ <i>Supervised and supported staff and students at 1 of 2 school sites at first start-up charter middle school in the San Fernando Valley.</i></li></ul>		
	2001 - 2003	Community Charter Middle School	San Fernando, CA
	<b>Art Instructor / Arts Program Coordinator</b>		
	<ul style="list-style-type: none"><li>▪ <i>Designed visual arts curriculum for 6<sup>th</sup> – 8<sup>th</sup> grade.</i></li><li>▪ <i>Organized yearly Arts Showcases highlighting student work in music, visual and performing arts.</i></li></ul>		
	1992 - 1994	University of Pennsylvania	Philadelphia, PA
	<b>MFA</b>		
	1991 - 92	University of the Arts	Philadelphia, PA
	<b>BFA</b>		
<b>Education</b>			

## Glenda Rossana Alemán, Ph.D.

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### CURRENT POSITION

Induction Director for PUC Schools Induction Program

### EDUCATION

**Ph.D.** Education: Urban Schooling

Concentration: Curriculum

Graduate Certificate in Women's Studies

University of California, Los Angeles

1999 – 2005

**CLAD** Education: Teacher Education

Multiple Subject Teaching Credential

LAUSD Level A fluency in Spanish

National University

2002 - 2003

**M.A.** Education: Educational Foundations

Concentration: Sociology of Education

California State University, Los Angeles

1997 - 1999

**B.A.** History

University of California, Irvine

1992 - 1995

**B.A.** Women's Studies

University of California, Irvine

1992 – 1995

### DISSERTATION TITLE

Voices from the Margins: Experiences of Racial and Sexual Identity Construction for Urban Latino Youth.

### AREAS OF EXPERTISE

\*SDAIE methodology

\*data-driven instruction

\*cross-curricular thematic units

\*performance-based assessments

\*differentiated instruction

\*professional learning communities

\*backwards design  
\*intervention program design

\*multicultural curriculum  
\*literacy strategies across the content areas

## **TEACHING EXPERIENCE**

### **University Experience:**

**Adjunct Professor,** Department of Teacher Education: National University  
Courses taught      TED 615: Foundations of Education

Term: Fall 2009

**Assistant Professor,** Department of Teacher Education: CSU, Dominguez-Hills  
Courses taught:      TED 415: Multicultural Education  
                             TED 470: Critical Perspectives in Education  
                             TED 407: Language Learning  
                             TED 476: Summative Assessment Seminar  
                             GED 503: Socio-Cultural Issues in Education

Fieldwork              Multiple Subject BCLAD candidates

Supervision:          Single Subject Social Studies and Language Art interns

Description: My teaching assignments at CSUDH have allowed me to learn how to effectively train and coach beginning teachers using the latest research on best practices in the urban classroom. In particular, I have mentored and evaluated our teacher candidates' final portfolios and videos where they must demonstrate the 13 California Teacher Performance Expectations.

### ***Term: Fall 2004 to Spring 2008***

**Lecturer,** Department of Secondary Education: CSU, Fullerton  
Course: EDSC 536: Curriculum Theory and Development  
Term: Spring semester 2004

**Lecturer,** Department of Teacher Education: Whittier College  
Course: EDUC 504: Language Development and Methodology  
Term: Spring Semester 2004

**Lecturer,** Department of Educational Foundations and Interdivisional Studies: CSULA  
Course: EDFN 414: The Social Foundations of Education  
Term: Winter quarter 2003

### **Public School Experience:**

**Instructional Coach,** Partnerships to Uplift Communities (PUC) Schools

Grades: Middle School

Description: Responsible for assisting the Instructional Leaders in creating a scope and sequence for professional development and in planning and delivering individual professional development sessions, mentor teachers in unit design using the backwards design model, and in

daily lesson design using the PUC learning cycle. I model and co-teach effective lessons for both experienced and novice teachers.

Term: July 2008 to June 2009

**Social Studies/Community Action Teacher**, Los Angeles Leadership Academy Charter

Grades: 6 and 7

Term: July 2002 to July 2003

**Teacher**, Miramonte Elementary School, Los Angeles, LAUSD

Grades: 4 and 5

Term: March 2001 to December 2001.

**Sheltered English and Social Studies Core Teacher** (long term substitute), Gage Avenue Middle School,

Huntington Park, LAUSD.

Grades: 6

Term: April 2000 to September 2000

**Dual-Language Immersion Teacher**, Weigand Avenue Elementary, Los Angeles, LAUSD.

Grades: 2, K, and 5/6 combo

Term: January 1997 to September 1999

## **EDUCATIONAL ADMINISTRATION**

**Induction (BTSA) Director**, Partnerships to Uplift Communities (PUC) Schools

Grades: Middle School

Description: Responsible for designing PUC Schools Induction Program and submitting application to the state for authorization to begin 2010-2011. Train and mentor PUC cadre of BTSA support providers, and design and deliver professional development for support providers. Administrate day-to-day operations, including recruiting and enrolling BTSA teachers, overseeing funding stream between state, district and PUC, etc. Serve as a BTSA support provider to twelve new teachers.

Term: July 2009-present

**Instructional Coordinator**, Academia Avance Charter School, Highland Park, CA.

Description: Responsible for establishing a school-wide instructional program; designing professional development for teachers and staff; hiring, supervising, and evaluating teachers and after-school tutors; and selecting differentiated curricular materials. Monitored CELDT and CST testing, as well as local instructional assessments. Prepared various state mandated reports—LEA plan, EL Masterplan—and prepared program evaluation reports for charter renewal.

Term: October 2006 to June 2008

## **EDUCATIONAL CONSULTING**

**Professional Development**, Los Angeles International Charter High School, Lincoln Heights, CA.



Description: Led a 3-day professional development workshop using the Professional Learning Communities framework and a 4-day professional development session on Understanding by Design and SDAIE methodology.

Term: August 2007

## **RESEARCH EXPERIENCE**

**Principal Investigator**, Teacher Education Department, CSUDH

*Multicultural Curriculums in Urban Schools: Can Teachers Implement Theory into Action?*

Description: Conducted surveys and interviews of beginning teachers in urban classrooms, in order to examine if teachers receive enough tools and strategies in their teacher preparation programs to implement a culturally relevant curriculum.

Term: June 2005 to June 2006

**Research Assistant II**, Graduate School of Education and Information Studies, UCLA.

*Venice/Westchester and UCLA Collaborative: Literary Coaching Intervention*

Description: Conducted classroom observations, videotaped and logged classroom activities and quantify the level of teaching strategies and discourse patterns implemented by the teachers being coached in “community of learners” pedagogy.

Principal Investigator: Dr. Kris Gutierrez

Term: Fall 1999 and Winter 2000.

## **ADDITIONAL CERTIFICATION AND TRAINING**

**Candidate Support Provider**

National Board for Professional Teaching Standards

Certified May 2009 at National University

**Trainer of Trainers**, National Training Program on Safety, Bias, and GLBT Issues. NEA

Description: I have been certified to deliver two training modules specifically designed for teachers and other school personnel. The modules examine the obvious and subtle ways that bias plays out in schools and provides various approaches to designing and integrating activities into the classroom to help raise awareness of bias and to empower students to advocate for change.

Term: August 2006 to present

## **COMMUNITY SERVICE/ACTIVISM**

**Member**, California Consortium for Critical Educators, Southern California

Description: The organization is committed to changing traditional teaching practices, school environments, and research agendas to include social justice as a pedagogical project.

Term: September 2000 to 2006

**Telementor**, Center for Language Minority Education Research (CLMER): CSULB

Description: Telementors are trained to examine issues of diversity and equity and how those relate to teaching and learning with technology. My project includes creating a website of support for teachers attempting to implement critical pedagogy in their classrooms.

Term: May 2001 to May 2002

**Organizer,** *La Resistencia*, Los Angeles, Ca.

Description: Organized public demonstrations, petitions, public meetings and actively recruited support against Proposition 187.

Term: August 1994 to January 1996

## **PUBLICATIONS**

### **Book Chapters (single authored):**

Aleman, G. (in press) Schooling as Usual: Institutional Violence in the everyday schooling experiences of Latino LGBT students. In Tozer, S., Gallegos, B., Henry, A., Groves Price, P., Bushnell Greiner, M. (Eds.) Handbook of Research on the Social Foundations of Education. New York: Routledge Press.

Aleman, G. (2004). Constructing Gay Performances: The Regulation of Gay Youth at a 'Gay-Friendly' High School. In Alexander, B. K, Anderson, G., Gallegos, B. (Eds.) Performance in Education: Teaching, Reform, and Identities as Social Performances. New Jersey: Lawrence Erlbaum and Associates.

### **Book Chapters (co-authored):**

Howard, T. and Aleman, G. (2007). Developing a Critical Knowledge Base for Teacher Capacities: What Do Teacher Need to Know? In Cochran-Smith, M., Feiman Nemser, S. & McIntyre, J.(Eds.) Handbook of Research on Teacher Education: Enduring Issues in Changing Contexts.

Howard, T. and Aleman, G. (2004). The Role of Race in Teacher Education: Using Critical Race Theory to Develop Racial Consciousness and Competence. In Kesson, K., Ross, W. (Eds.). Defending Public Schools: Teaching and Teacher Education. Praeger/Greenwood Publishing.

## **PROFESSIONAL MEMBERSHIPS**

Association for Supervision and Curriculum Development  
California Charter School Association  
California Association for Bilingual Education  
National Association for Multicultural Education

## **LANGUAGES**

Fully biliterate in English and Spanish.

## **REFERENCES**

Available upon request.

## EDUCATION

**Loyola University**, New Orleans, LA, Summer, 2002

- Took seminar on The Monster in Literature as a National Endowment for the Humanities fellow

**Columbia University Teachers College**, New York, NY, Summer, 2000

- The Writing Project Summer Institute and course on the American Short Story

**Harvard Graduate School of Education**, Cambridge, MA, 1997

- Ed.M. in Administration, Planning, and Social Policy

**California State University at Hayward**, Hayward, CA, 1996

- Secondary English Teacher Credentialing Program

**Yale University**, New Haven, CT, 1993

- B.A. in Literature, with distinction in the major
- Summa cum laude, Phi Beta Kappa

## PROFESSIONAL EXPERIENCE

**Independent Educational Consultant**, Self-Employed, Los Angeles, August, 2008-present

- Advise local schools on implementation of new instructional tools; facilitate accreditation of high school WASC self-study; assist charter management organization leaders with developing operational systems; deliver professional development to teachers on Thinking Maps and Critical Friends Groups; write and manage curriculum development for national alternative certification program aiming to close the achievement gap

**Founding Teacher and Administrator**, Camino Nuevo Charter Academy, Los Angeles, 2001- 2008

- Started new charter school site from ground up as founding teacher, including recruiting students, revising mission, designing schedule, selecting curricular materials, developing partnerships, and creating benchmark exams
- Served as Humanities teacher (2001-2002), Professional Development Coord. (2002-2003), Director of Middle School Instruction (2003-2005), Assistant Principal (2005-2007), and Literacy Coord. (2007-2008)
- Designed and implemented standards-based, interdisciplinary curriculum for seventh grade Humanities, Language Arts intervention, and English Language Development classes
- Delivered data-driven professional development to 50 K-8 teachers across two campuses, resulting in high satisfaction on teacher professional growth survey
- Hired and supervised teachers assistants and intervention teachers
- Coordinated state testing, school-based summative and formative assessment plan, and comprehensive intervention program to provide extra support to students in need
- Created cadre of instructional leaders to design curriculum, assessment, and professional development
- Mentored new teachers and nurtured growth of experienced teachers through coaching
- Spearheaded school-wide implementation of Understanding by Design, Thinking Maps, inquiry-based science, guided reading, writing portfolios, and common math problem-solving approach
- Fostered strong parent and community involvement through parent workshops and community events
- Led school to become initially certified by WASC and to raise its API over 180 points

**Instructor**, California State University Dominguez Hills, Dominguez Hills, CA, August, 2001 – 2003

- Prepared pre-service and emergency-credentialed teachers to be effective reading and writing teachers
- Developed common case study project with other CSU faculty

**English Teacher**, Foshay Learning Center, Los Angeles, August, 2000 – June, 2001

- Designed standards-based lessons for 8<sup>th</sup> grade English incorporating a workshop approach
- Trained USC student teachers in management, literature analysis, and essay writing instruction
- Collaborated to develop vertically aligned curriculum in English department across three tracks

**Founding Teacher**, Manhattan Academy of Technology, New York City, 1997-2000

- Founded new small school with two other educators
- Taught 6<sup>th</sup> grade Humanities, resulting in rank as school with one of most improved test scores in NY City

- Designed interdisciplinary units with science/math and art teachers
- Modeled readers and writers workshop to student teachers from Columbia University Teachers College
- Advised Council For Unity Club and participated in Young Adult Literature Club
- Worked actively on school leadership team to set school policy and vision

**Language Arts Teacher, Carter Middle School, Oakland Unified School District, Oakland, CA, 1993-1996**

- Selected as member of national corps of teachers committed to teaching in hard-to-staff schools
- Increased reading and writing proficiency of over 150 English students each year through combination of rigorous academic work and remediation for students entering class severely behind
- Led students to write and produce two plays in drama club
- Selected for district-wide team to write and pilot lessons on issues of race, class, culture, and gender

**RESEARCH AND OTHER EXPERIENCE**

**Presenter at City, State, and National Educational Conferences**

- Presented original research and spoke as a panelist at over 15 conferences, including the CSDC Conference on Best Practices in English Language Development (2007), California Charter Schools Conference (2005), AERA (2004), California K-16 Partnerships Conference at CSU Long Beach (2007), Conference on High Stakes Testing at Columbia University (2000), and Ethnography in Education Research Forum at Univ. of Pennsylvania (2000)

**Author of Educational Research**

- Conducted and wrote action research and curriculum for publication, including "The Mother Tongue: The Role of Parent-Teacher Communication in Helping Students Reach New Standards," in *Taking Action with Teacher Research* (Heinemann, 2003) and "What Do Schools Organized Successfully Around Standards Look Like?" in *What Matters Most* (National Teacher Policy Institute/Rockefeller Foundation/NCTAF, 2000)

**Research Assistant and Editor for Harvard Professors, Cambridge, MA, 1996-1997**

- Conducted literature review on nationalized testing for Prof. Jay Heubert's congressional report, which entered into discussion of No Child Left Behind Act
- Edited texts written by Profs. Gary Orfield and Chris Edley, whose works for Harvard Project on Racial Justice affected state and national policy on educational and housing desegregation

**OTHER ACCOMPLISHMENTS & SKILLS**

**Experienced Grant Writer**

- Wrote and received over \$50,000 in grants for a variety of school and classroom projects, including New Visions Chase Active Learning Grant of \$10,000 to implement and disseminate original interdisciplinary "Recycle a Bicycle" unit and \$15,000 Los Angeles Local Council Community Improvement Grant to turn dreary school courtyard into peaceful student and community garden

**Met Life Fellow, Teachers Network Policy Institute, New York City and Los Angeles, 1998-2005**

- Conducted action research to influence local school policy
- Collaborated with educators across the country to advise educational policy makers; represented teachers on Education Commission of the States' Closing the Achievement Gap panel

**Coordinator, Board Mentorship Program, Teen Voices/Women Express, Inc., Boston, MA, 1996-1997**

- Trained teens to be active board members and adult board members to work with teen counterparts
- Conducted writing and editing workshops for teen staff of magazine with national distribution

**CREDENTIALS & OTHER INTERESTS**

- California Professional Clear Teaching Credential in Secondary English and CLAD, 1996
- Certificate of Eligibility for the Administrative Services Credential, 2004
- Proficient Spanish, French, and Italian
- Experienced in bookmaking, kickboxing, and creative writing
- Hobbies include cooking, reading, and traveling

Lara Goldstone, p.2



# VICTORIA A. HARVEY

## EDUCATION

Ph. D., IN PROGRESS, EDUCATION, EMPHASIS IN TEACHING AND LEARNING

UCSB, Santa Barbara, CA, expected completion 2013

MASTER OF ARTS DEGREE, AMERICAN STUDIES

Pepperdine University, Malibu, CA, December 2002, Keck Fellowship recipient

RYAN SINGLE SUBJECT CREDENTIAL, ENGLISH, CLAD

Pepperdine University, Malibu, CA, 1999

BACHELOR OF ARTS DEGREE, ENGLISH

Pepperdine University, Malibu, CA, 1999

STUDY ABROAD EXPERIENCE – through Pepperdine University

1996 – Concentrated general courses and German language, with studies throughout Europe

1998 – Concentrated Biblical and cultural study in Israel, Turkey, Italy, and Greece

## PROFESSIONAL EXPERIENCE

**TEACHER, VIEWPOINT SCHOOL**, CA, Sept. 2003 – June 2009

**Mentor Teacher:** Utilized and created mentoring curriculum to guide teachers new to the profession and school

**Curriculum Mapping Committee:** Assisted in developing goals and plans for school-wide curriculum mapping

**Sixth Grade Ancient World History:** Generated units on Mesopotamia, Egypt, India, Israel, Greece, and Rome

**Sixth Grade English:** Constructed literature units and grammar lessons aligned to state standards

**Seventh Grade World Cultures:** Piloted and designed curriculum for world geography and cultures units

**Eighth Grade American History:** Researched and executed rigorous U.S. history curriculum

**Newspaper and Literary Magazine:** Advised students on layout, writing, and marketing for both publications

**Middle School Advisor:** Facilitated Homeroom and Advisory classes in character education

**Middle School Girls Volleyball Coach:** Instructed students in volleyball fundamentals and coordinated games

**Advisory Coordinator:** Collaborated with colleagues to craft lessons and direct a school-wide advisory program

**MASTER TEACHER AND MENTOR, PEPPERDINE UNIVERSITY** CA, Sept. 2000 – June 2009

**Master Teacher:** Facilitated aspiring teachers in the beginning stages of student teaching

**Seminar Mentor:** Led seminar class for pre-service teachers in current student teaching placements

**TEACHER, MALIBU HIGH SCHOOL**, CA, Sept. 1999 – June 2003

**Beginning Teacher Support Association (BTSA) mentor:** Supported new colleagues through the BTSA program

**Reading Specialist:** Originated and piloted reading program for struggling sixth-grade readers

**District Writing Assessment Task Force:** Participated in creating prompts and rubrics for district use

**Governance Council member:** Assisted in creating school site plan

**Sixth grade core member:** Devised core literature and social studies units on ancient world cultures

**Seventh grade core member:** Developed core literature units on Africa, the Middle East, and China

**Eighth grade core member:** Designed core literature units enhancing critical thinking related to Bloom's taxonomy

**FREELANCE EDITOR, MOTOR TREND MAGAZINE**, Los Angeles, CA Feb. 1998 – Sept. 1999

Authored 2000 New Car, Truck, and SUV Buyer's Guides and contributed to web site as online news editor

## RELATED EXPERIENCE

**STUDENT TEACHER, ROYAL HIGH SCHOOL & MALIBU HIGH SCHOOL**, CA Jan. 1999 – May 1999

**WRITING CENTER TUTOR, PEPPERDINE UNIVERSITY**, Malibu, CA, Aug. 1997 – Dec. 1998

Aided students in various writing assignments at all stages of the writing process

Served as a writing facilitator for Limited English Proficient (LEP) students

**INDEPENDENT TUTOR**, middle school and high school students, and adults, Sept. 1998 – Present

## **PROFESSIONAL ORGANIZATIONS**

Computer Using Educators (CUE) member and conference attendee, 2003, 2004, 2005

National Council of Teachers of English (NCTE) member and conference attendee, 1999 – Present

# PAGEE CHEUNG

## EXPERIENCE

### Harlem Village Academy High School

*Lead Teacher/Advisor*

New York, NY

2008-Present

- Teach and design curriculum for Integrated Algebra, Geometry, and Entrepreneurship courses as the lead teacher
- Develop diagnostic exams and implement data-driven instruction that targets specific standards for each student
- Showcase Teacher at annual Lesson Study Open House with Global Education Resources; Collaborated with team of internationally-acclaimed mathematics education expert team members to develop and design lesson plans
- Advise, observe, coach, and collaborate with math teachers on pedagogical strategies within the network
- Maintained 100% passing rate record for Integrated Algebra Regents Exams since 2007 (date of first exam)
- Established strong rapport with parents and other members of the East Harlem community

### Math Midway Museum

*Author*

New York, NY

Present

- Wrote and designed mathematically-themed field trip program book, publication pending
- Collaborated with Math for America master teachers to construct detailed plans for engaging students in problem solving and constructive thinking at the Math Midway, a travelling museum of challenging puzzles and activities
- Created marketing package to incite interest and participation for the tailored programs amongst math educators
- Presented and created training materials for docents working with classroom students

### Baruch College Campus High School

*Teacher/Advisor*

New York, NY

2006-2008

- Taught Integrated Algebra, Math A, and Entrepreneurship at U.S. News Best High Schools Silver Medal school
- Developed formative Interim Assessments and analyzed test results with corresponding rubric
- Established new Integrated Algebra and Geometry curricula to align with collaborative partner
- Entrepreneurship team won Second Place citywide in the Junior Achievement Business Plan Competition

### Paramount Pictures Company

*Financial Analyst*

Hollywood, CA

2004-2006

- Worked directly under Senior VP of Motion Picture Financial Planning
- Programmed data models for profit-loss projects of up to \$25 million-budget films
- Processed operative financial books used in executive board meetings for evaluation of 2006-2007 slated films
- Analyzed aggregate revenue for accumulated film earnings from syndication, box office, DVD sales, and POD
- Planned for films requiring additional loans to finance completion of filming

## EDUCATION

### Teachers College, Columbia University, New York, NY

May 2007

- Master of Arts in Secondary Mathematics Education
- GPA: 3.91

### University of Southern California, Los Angeles, CA

May 2006

- Bachelor of Science in Business Administration, Marshall School of Business  
Double Concentration in Entrepreneurship and Finance
- Biotechnology Minor
- Major GPA: 3.86

## CERTIFICATION

### New York State Certificate in Mathematics

May 2007

## ADDITIONAL INFORMATION

- Math for America Newton Fellow
- Multilingual: Proficient in Spanish, Mandarin, and Cantonese
- Best Buddies, tutor and mentor at school for the mentally disabled
- Created Web Health Education Resources for Elders (WHERE) and trained seniors at L.A.-based St. Barnabas Center
- Chinese American Student Association, Vice President of External Affairs 2003-04



## **Lisa Tremain**

### **EDUCATION**

**Bachelor of Arts Degree in English Literature, Sonoma State University, 1995.**  
**Single Subject Credential, English, Sonoma State University, 1997.**

### **TEACHING EXPERIENCE**

*August 2000 to present: Teacher/Administrator, Constellation Community Middle School.*

Administrator and educator in alternative-program charter school. Teacher of Language Arts, Social Studies, and Conflict Mediation classes. Administrative duties include: grant writing, library acquisitions, curriculum development, standards assessment and implementation. Mentor teacher and coordinator of teacher evaluations.

*August 1999 – August 2000: Language Arts Teacher, Adams Middle School.*  
Created unit plans, daily lessons, and thematic curriculum. Worked with students of different learning styles and ability levels. Director of after school Reading Club. Leading member of Student Study Team.

*August 1997 – June 1999: English Teacher/Student Activities Director, Elsie Allen High School.*

Teacher of English Literature for 9th, 10th, and 11th grades and piloted program for “at risk” youth. Served as director for EAHS student government class, providing guidance for student leaders as they organized campus-wide events, such as fund-raisers, pep-rallies, and dances.

### **TRAINING AND EXPERIENCE**

Library Director: Constellation Community Middle School.

Testing Coordinator: Constellation Middle School.

Writer: Redondo Beach Unified Schools Standards and Assessment Committee

Member: Governor’s Institute, CSU Long Beach.

Member: California Literature Project.

Member: North Bay Writing Project.

### **REFERENCES**

Daphne Ching-Jackson, Director: Constellation Community Middle School,  
(562) 435-7181.

Nik Orlando, Teacher/Administrator, CALS Middle School, Los Angeles,  
(323)259-5901.

Karen Westberg, Principal, Adams Middle School, (310)798-8636.

J.J. Wilson, English Professor, Sonoma State University, (707) 664-2882.

## **Manish Narayan,**

**Objective:** Software Consultant/Developer with a thorough knowledge of SDLC having Extensive experience in requirement definitions, architecture, system analysis, design, development, testing, implementation, documentation, debugging and maintenance of distributed applications.

### Education

**Master of Science**, Aerospace Engineering, California State University, Northridge

**Bachelor of Science**, Mathematical Physics, California State University, Northridge

### Career Profile

- **6 Years** of professional IT experience in software design, developing, integrating and implementing multi-tier enterprise products and applications using **OOP, J2EE and Java technologies**, catering to industry standard methodologies and techniques.
- Full life cycle of Java Application Developments, Including Analysis, Requirements Gathering, Design, Development, Implementation, Maintenance and Enhancements.
- Implementing the application logic using **Struts, Hibernate, springs and AJAX**.
- Experience in Developing J2EE (JSP, JMS, Servlets, EJB etc) components using various IDEs such as **RAD, Eclipse, JBuilder, Forte and NetBeans**.
- Experience on **Weblogic, Web Sphere and JBoss Application Servers**.
- Strong experience with **RDBMS like Oracle, SQL Server and MySQL**.
- Experience in **JUnit** and writing build script using **ANT**.
- Experience in front end development with **HTML, JavaScript, CSS, JSP and Display Tag**.
- Design Pattern implementation experience (**MVC, Session Façade, Service Locator, Dao's, VO's, and Singleton**).
- Experience in using **Web Services(WSDL,SOAP)**
- Experience in Generating Reports Using **iReport API**.
- Experience in mail system using **Java Mail API**.
- Leveraged the industry's best methodologies and practices (such as OOP, Design Patterns, UML etc.) for design, development and implementation of applications and to deliver highly scalable, reliable and quality products. Experience in designing of **UML diagrams** such as **Use Case, Class, Activity and Sequence for Software development**.
- Skilled at debugging / troubleshooting and production Support for various Applications.
- Good team player with excellent work history as regards with work ethics, dependability and willingness to go an extra mile.

### Technical Expertise

Sun Trained Programmer

<b>Languages</b>	Java, SQL, PL/SQL, Matlab, C++, C, FORTRAN, VB, VBA
<b>Internet Applications</b>	J2EE (SERVLET, JSP, JDBC, RMI, JNDI), Web Services, Struts, Spring Framework, Hibernate
<b>Web/Application Server</b>	WebSphere, JBoss, Tomcat WebServer
<b>Other Languages</b>	Java Script, HTML, DHTML, XML/XSL, VoiceXML, AJAX
<b>Database Application</b>	Oracle 7.x/8x/9x/10, DB2, Sybase, MS-Access. SQL Server 2000
<b>Operating Systems</b>	Windows/98/NT/2000, MS-DOS 6.2, Mac OS, Linux, Unix
<b>Control Tools</b>	Rational ClearCase, CVS, MS Visio, MS Excel, MS PowerPoint
<b>Other Tools</b>	JUnit 3.8.1, Log4j 1.2.1
<b>Reporting Tools</b>	Cognos, Business Objects, Crystal Reports, SAS

### **Research Experience**

Sep 2007-May 2008 **Graduate Thesis Project: Dr. Tom Mincer**, California State University, Northridge.

- Integrated Design: Using a VBA Object System Model
- A Universal VBA (Visual Basic for Applications) object-oriented system integration model was developed for the use of professionals and students in various disciplines of engineering
- Automation of component parameters linking across Excel worksheets/workbooks was developed along with the automation of the component solid model design
- Tools consisted of: a spreadsheet interface (Microsoft Excel 2007), a programming interface (Microsoft Visual Basic for Applications), and a solid model design interface (SolidWorks).
- Model was applied to a Centrifugal Pump System and an optimization study was performed using the Excel Solver add-in.

Jan-May 2008 **Computational Aerodynamics: Dr. Tim Fox**, California State University, Northridge.

- Introduced to mesh grids created in Gambit along with Fluent software
- Analyzed airfoil, cylinder, converging-diverging nozzle using Fluent

Jan-May 2007 **Conceptual Aircraft Design: Dr. Tim Fox**, California State University, Northridge.

- Designed a 19 passenger business jet with subsonic Mach
- Modeled mission stages including: take-off, climb, cruise, loiter, descent, and Landing
- Created Visual Basic graphical user interface for mission input/output parameters
- Performed a trade study using carpet plots and varying key performance parameters such as thrust to weight and wing loading to meet runway requirements
- Developed Visual Basic algorithm to loop through Mach, aspect ratio, thrust to weight, and wing loading in order to output many jets which would satisfy constraints

### **Accomplishments**

- Secured 1<sup>st</sup> position among 400 candidates appearing for the CBEST (California Basic Educational Skills Test) in 2006.
- Distinction in Mathematics throughout academic career
- CSET Single Subject: Mathematics (Passed Subtests I, II, III in single sitting on first attempt).
- Completed Java Programming Language Training at Sun Microsystems, Monrovia, CA

### **Extra Curricular Activities**

- Top 20 ranking in under-18 tennis in Southern California.
- Played varsity number one position on high school tennis team for 3 years.

and store vehicle diagnostic and odometer messages and detect route stops within vehicle GPS messages. Built web services using Axis2 and JiBX to geocode addresses and reverse geocode latitude/longitude coordinates. Persistence and query operations were targeted to existing Sybase databases and a new-to-the-environment ESRI ArcGIS Server.

- Modules were built in layers (data object layer, data access object layer, service layer, and MDB/web service layer) - with persistence to seven data sources using Hibernate, transaction and other configuration wiring using Spring, extensive out-of-container unit testing using JUnit and ActiveMQ - and then deployed to either WebSphere Application Server v6.x or Apache Geronimo (WebSphere Community Edition).
- Helped configure new WebSphere Application Server for the UAT (User-Acceptance Testing) environment, including data sources, listener ports, MQ queues, and queue aliases.
- One of four developers that migrated the applications development department over to a new build environment based on Subversion, CruiseControl, and Maven2. This included administering Subversion projects (branching and merging), configuring CI (Continuous Integration) builds, and debugging Maven2 build issues. Mentored junior Java developers through Eclipse, Maven2, Spring, Hibernate, Subversion, and general Java issues and documented knowledge in several in-house wiki pages.
- Devised and implemented a strategy that allows for Hibernate persistence operations against legacy quarter-partitioned (date-delimited) database tables, allowing for dynamic, on-the-fly mapping of new tables without the need for restarting the system.
- Mentored less-experienced developers.

**Environment:** Server-side Java (J2EE), Hibernate, Spring Framework, MDB, EJB, JMS, XDoclet, JUnit, ActiveMQ, Maven2, REST Web Services, Axis2, JiBX, Sybase, Eclipse IDE, Subversion, CruiseControl CI, WebSphere v6.0.2.17, Apache Geronimo, Windows OS, Unix OS.

### Teaching Experience

Mar 2009-Present **Adjunct Professor of Computer Science**, ITT-Technical Inst.

- Teaching senior level courses: Programming, Software
- Courses taught: Java Programming, C/C++ Programming, VB
- Responsible for and President of first Mathematics Tutoring Club.
- Average class size: 31 students

Sep 2007- May 2008 **Adjunct Professor of Engineering**, California State University, Northridge.

- Instructed upper division undergraduate mechanical engineering course
- ME 309 – Numerical Analysis of Engineering Systems
- Solved Engineering problems which required the use of algorithms and numerical analysis in order to obtain solutions
- Implemented numerical algorithms using Matlab/Visual Basic for Applications
- Average class size: 30 students

Various Seminars **Engineering Consultant**, *SpreadsheetWorld, Inc.*

- Instructed Spreadsheet-Aided Engineering Training Course Seminars at General Motors, Lockheed Martin, The Aerospace Corporation.
- Participants were led through a structured approach to engineering systems design, with the basic principle of object-oriented programming introduced along the way.
- Elements of Visual Basic programming were established while learning to extend the capability of working on the Excel worksheet
- Techniques were introduced for spreadsheet architecture and communication for large-scale systems engineering.



### Software Engineering Experience

Jan 2004-Jul 2010 Sr. Software Engineer, Complete Computer Solutions, CA.

#### **Responsibilities:**

- Design, develop, & deploy Enterprise Payroll/HR application in **Java** with **Oracle** backend
- Design, develop, & deploy multi-tier web application in **IIS** and **Tomcat** (Servlets)
- XML mapping configuration from RDBMs to industry standard for Human Resources/Staffing (HR-XML)
- Convert XML Schemas to Java object using **XmlBeans** to integrate with Oracle database
- Enhance **XSLT** program for use by QA and Documentation team
- Design, develop, & deploy **ASP.NET 2.0** enrollment application for payroll services
- Design client specific **CSS** with seamless integration for product branding
- Design & develop **SOAP** web service for real time update of employee data in 3<sup>rd</sup> party T/E web application
- IIS, Tomcat & Oracle installation, configuration, & deployment
- Extensive use of Object Oriented Programming techniques (OOP) in Java and **Javascript** (ECMAScript)
- Integrate job scheduling API for creating payroll data in Java on Oracle
- Design and develop real time import of timecard data via HTTP file upload in CSV format via **Java Servlet** in Tomcat/IIS installation environment
- Write **DHTML** for web application using Javascript/**DOM/RegExp/CSS** to reformat input for data integrity, intuitive access keys for mouseless entry, comprehensive tool tip design, case insensitive search capabilities and regular expression data validation prior to form submittal
- Design & implement procedures for utilizing collaboration program among developers, clients, and end Users.
- XML file/data submittal using **AJAX** (ActiveX & Javascript)/DOM for real time importing of employee job data in a Staffing environment.
- Implement real time notification for database events using the Java **SendMail** API
- Report design using **Active Reports 2.0**
- Design & develop database schemas, user interface, backend java processing for quarterly tax adjustments prior to submittal to Federal & State Tax Authorities
- Design & develop Invoicing system billing for payroll (db schema, UI, backend processing & reporting)
- Design & implement physical and programmatic security policies and procedures
- Implement **SSL** on MS IIS and Tomcat
- Establish internal certificate authority (CA) for use with SSL web application
- Write **VBScript** to simplify tasks
- Implement & customize CGI/Perl issue tracking program
- Implement comprehensive disaster recovery policy and procedures
- Maintain & enhance public corporate website
- Design web graphics & logos for clients without technical resources

**Environment:** Seam Framework v2, Facelets, JEE, EJB v3, Java (JSR-168) Portlets, JBoss Server v4.2.x, Scrum methodology, Hibernate, Spring Framework, Maven2, Ant v1.7.x, CruiseControl, JBoss RichFaces v3.x, JBoss Portal v2.6.x, JBoss Portlet Bridge, mod\_jk, Apache HTTP Server v2.x, CVS, SQL Server, XA, Server-side Java (J2EE), JRuby v1.2, WebSphere v6.1, Sterling Commerce Gentran Integration Suite (GIS) v4.3, Connect:Direct, GIS Business Process Modeling Language (BPML), SFTP, Struts1, JSP, JUnit, EJB2, WebSphere v5, Oracle RDBMS, Eclipse IDE, MKS (version control), Windows OS, Linux OS.  
- Design: UML, Visio.

Aug 2008-Jan 2009 **Software Engineer**, ARINC (6-month Contractor).

#### **Responsibilities:**

- Developed back-end portions of a GIS (Geographic Information System) application that processes incoming messages sent from monitoring devices installed in client fleet vehicles. Built MDB-fronted modules to process

## **Curriculum Vitae**

Matthew Paul Goodlaw, M.S.

US Citizen

### **EDUCATION**

M.S., with distinction, Spring 2009

California State University, Northridge (CSUN)-Northridge, Ca

Major: Interdisciplinary Studies: Quantitative Research Methods for Social Sciences

Thesis: Residential Real Estate and Retail Gas Prices: A Test of Petrodollar Recycling Theory

Advisor: Dr. Pete Goldschmidt

B.A., cum laude, Spring 2005

California State University, Monterey Bay (CSUMB)-Seaside, Ca

Major: Social and Behavioral Sciences: Political Economy

Thesis: One Educational Setting, Two Educational Experiences: A Glimpse Inside the Dynamic Educational Experiences at CSUMB and the Political Economy of Student Government.

Advisor: Dr. Angie Tran

### **SUMMER INTERNSHIPS / CERTIFICATIONS / TRAINING INSTITUTES / AWARDS**

2008

Graduate Equity Fellowship

California State University, Northridge

Summer, 2005 and Summer, 2007

ICPSR Summer Program in Quantitative Research Methods

University of Michigan, Ann Arbor, MI

Courses: Math for Statistics (probability and matrix algebra), Rational Choice Models, Game Theory, Regression Analysis I & II (SPSS Syntax), Categorical Analysis, and Scaling and Dimensional Analysis

Fall 2004

Certificate – Panetta Institute for Public Policy

California State University, Monterey Bay (CSUMB)-Seaside, Ca

Congressional Internship (Representative Sam Farr), Washington, DC

Supervisors: Rochelle Dornatt (Washington DC) & Dr. Richard Kezerian (CSUMB, Panetta Inst.)

### **PROFESSIONAL EMPLOYMENT**

#### **Research Associate**

March, 2009 – Present

NIHGM MBRS SCORE (NGA-S06GM048680)

Using advanced applied assessment and measurement methods to develop assessments, manage and analyze data and write reports of data from high school students. Statistical methods employed include cluster analysis, latent

class analysis, multiple regression mediation analysis, factor analysis, and structural equation modeling (including model comparisons). Supervisor: Michele Wittig, Ph.D.

### **Sub-Contracts**

Summer, 2009

#### **Telephone Interviewer**

"Seeds of Science and Roots of Reading," an NSF sponsored program administered by the Lawrence Hall of Science at UC, Berkeley. Supervisor: Pete Goldschmidt, Ph.D.

January, 2009

#### **Data Consultant**

ERBS Program, University of Michigan

Used cluster analysis, factor analysis, t-tests, and chi-square tests.

March, 2007 – June, 2007

#### **Research Assistant**

Political Data Inc.

Assisted in developing a database (N=4.6million) of Absentee Voters in California to learn about voter behavior for targeting purposes.

January, 2006 – June, 2006

#### **Data Analyst**

Subcontract with Monterey County Office of Education to prepare a report based on statistics from the California Civic Index, administered to high school seniors in Monterey County. Survey was used to study the effectiveness of a Service Learning program. Supervisor: Dr. Pat Hanson, Service Learning Dept., California State University, Monterey Bay.

October, 2005 – May, 2006

#### **Research Associate**

Subcontract with Northrup Grumman Mission Systems to gather, review, and summarize literature on the meaning of national loyalty/allegiance to the United States. Identified past scholarly efforts to measure loyalty and/or patriotism; gathered literature with respect to insider espionage, citizenship, dual-citizenship, and identity. Project Supervisor: Lisa Kramer (Defense Personnel Security Research Center – PERSEREC/DoD).

### **TEACHING AND OTHER ACADEMIC POSITIONS**

#### **University Level**

Fall, 2003 through Spring, 2005

#### **Teaching Assistant**

Research Methods and Data Analysis Lab (SBS 366).

Social and Behavioral Sciences Department, CSUMB

Supervisors: Dr. Angie Tran & Dr. Barbara Olden

Spring, 2005

#### **Teaching Assistant**

Vietnam and U.S. History from 1880 to present (SBS 381). Social and Behavioral Sciences Department, CSUMB

Supervisors: Dr. Angie Tran & Dr. Gerald Shenk



Spring, 2004 and Spring, 2005

**Teaching Assistant**

Introduction to Global Political Economy (SBS 351).  
Social and Behavioral Sciences Department, CSUMB  
Supervisor: Dr. Angie Tran

Spring, 2003

**Teaching Assistant**

Economics, Policy and Management (ESSP 281).  
Earth Sciences and Systems Policy Department, CSUMB  
Supervisor: Dr. Mike Dalton

Spring, 2002 through Spring, 2003

**Supplemental Instructor**

Managerial Accounting.  
Business Department, GCC  
Supervisor: Christy Kloezezan

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**High School Level**

Summer, 2009

**Instructor**

Marymount College Summer Enrichment Program  
Algebra B  
Principal: Jennifer Meglemre

2006-2009

**Substitute Teacher**

Burbank Unified School District  
November, 2007 – January, 2008  
Physical Science (8th Grade) & Life Science (7th Grade, GATE)  
John Muir Middle School  
Principal: Dan Hacking

September, 2007 through January, 2007  
Physical Science (8th Grade) (9/07-1/07)  
Luther Burbank Middle School  
Principal: Anita Shackman

Pre-Algebra (Summer School, BUSD) (5/07-6/07)  
John Muir Middle School  
Principal: Rotating

Algebra Basics (3/07-5/07)  
Students w/Learning Disabilities  
Burbank High School  
Principal: Bruce Osgood

**SKILLS**

Conversational Spanish  
Computer Skills: Microsoft Office Suite (Proficient-Advanced)

SPSS (Advanced Skills)  
JMP Statistical Software (Advanced Skills)  
Dreamweaver (Novice)  
Internet Search Logic (Advanced Skills)

Frameworks/Methods:

Quantitative: Survey design; Cost/Benefit Analysis; Decision Analysis  
Qualitative: Interviews; Focus Groups; Content Analysis

Math Models and Statistical Analysis:

Descriptive/Inferential  
Univariate and Multivariate Methods

Social Scientific Theory:

Classical and Contemporary Social Theory  
Education: Psychology, Sociology, Economics, Policy, Administration  
Business Economic Theory and Philosophy (ROI Basics)  
Political Economic Theory and Philosophy  
Rational Choice Theories; Game Theory, Decision Theory  
Theories of Motivation: Education, Organizations

**LIST OF CURRENT GRANTS**

Mutual Acculturation Processes in Prejudice Reduction      Effort: 22% /calendar yr  
5 S06 GM 048680-14 (Wittig/Zavala)    07/01/2006 – 06/30/2010 [terminating]  
NIH/MBRS SCORE      \$114,000.00 annual total budget

**LIST OF PENDING GRANTS**

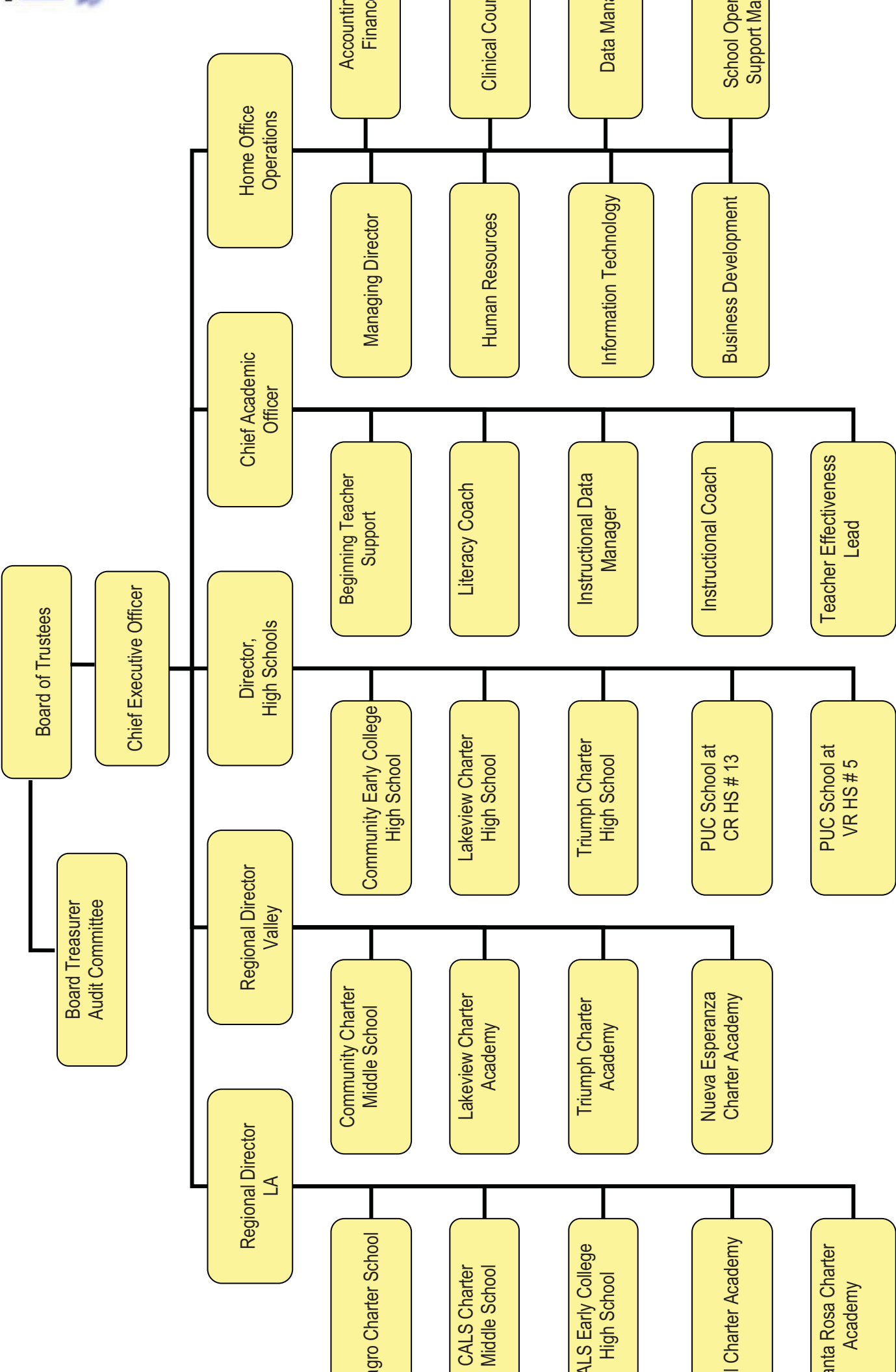
Development of Theory-Based Cultural Inclusion Strategies    Effort: 33% /calendar yr  
for Promoting Academic Achievement in the Multicultural High School Context  
Institute for Educational Sciences (Wittig) 03/01/11 – 02/29/14 [this proposed request]  
Social and Behavioral Context for Academic Learning    \$140,000 annual total budget

## **High School Director**

### **Job Description**

- **Provide oversight of all PUC high schools regarding all aspects of instruction, school culture, and operations**
- **Provide support and mentoring to the high school leaders in order to ensure their success and increase their efficiency**
- **Evaluate the performance of the high school leaders**
- **Provide the PUC Chief Executive Officer and Board of Trustees with regular reports regarding progress at the high schools**
- **Work collaboratively with the Regional Directors to ensure alignment of vision and culture in all PUC schools**
- **Ensure and support execution of each high school's strategic plan**
- **Provide professional development to high school teachers in collaboration with high school leaders and PUC home office personnel**
- **Ensure that high school leaders successfully execute all compliance responsibilities**
- **Collaborate with Regional Directors to plan and implement Regional meetings once per month where all school leaders within each region have the opportunity to network, share, and support one another**
- **Ensure that all high schools meet state testing and other compliance date deadlines**
- **Ensure all high schools complete PUC wide benchmark assessments on time and utilize the resulting data to drive instruction and design and implement intervention**
- **Support leaders in developing a high level of parent engagement**
- **Support leaders in developing community partnerships**
- **Support leaders in developing positive relationships with LAUSD and with other schools inhabiting the same facility**
- **Support leaders in achieving PUC's 3 commitments**

PUC Schools Organizational Chart, Revised 2010



Enabling Accountability Metrics	Measurement	2009-2010 Target	CALS ECHS	CALS MS	EXCEL	MIL	Santa Rosa	CCMS	CCECHS	LCA	TRIUMPH	Nueva Esperanza	% Schools Met Target
<b>1. Finance:</b>													
Payroll Submission	% of Accurate timesheets	≥ 90%	100%	99%	93%	100%	96%	100%	97%	100%	100%	100%	100%
Payroll Submission	Timeliness 1st Payroll (On Time, Late)	On Time	On Time	Late	On Time	On Time	Late	On Time	On Time	On Time	On Time	On Time	80%
Payroll Submission	Timeliness 2nd Payroll (On Time, Late)	On Time	On Time	Late	On Time	Late	Late	On Time	On Time	On Time	On Time	On Time	70%
% of Budget Spent YTD	% of Budget spent YTD	% on track with history	99%	164%	102%	99%	86%	97%	100%	97%	99%	86%	N/A
POI/Check Request Submission	% of Late Submissions	≤ 10%	3%	17%	9%	3%	20%	5%	45%	8%	8%	1%	70%
Fundraising Backup	# of dis/deposits without proper backup	0	0	16	1	2	2	2	12	0	0	0	40%
AR - Food Sales	Frequency money turned in	≥ 4 times/month	3	5	0	2	0	4	1	3	3	2	20%
AR - Fundraising	Frequency money turned in	≥ 1 time/month	1	6	3	3	1	2	3	3	2	3	100%
Credit Card Log	Time Turned In (On Time, Late)	10th of each month	On Time	On Time	On Time	On Time	On Time	On Time	On Time	On Time	On Time	On Time	100%
<b>2. HR</b>													
Recruitment	# of open positions	N/A	4	1	0	1	0	1	4	1	1	1	N/A
NCLB Compliance	% of school staff that is NCLB Compliant	95%	100%	80%	100%	93%	77%	73%	91%	74%	73%	88%	20%
Perf. Mgt	% of PM deliverables completed on time	100%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ER Situations	# urgent ER situations	< 1 annually	0	0	0	0	0	0	0	0	0	0	100%
Turnover	# of terminated employees (Voluntary/Involuntary)	< 15% annually	0	0	0	0	0	0	0	0	0	0	N/A
Out of Compliance - On Boarding	# of on-boarding issues	< 1	0	0	0	0	0	0	0	0	0	0	100%
Out of Compliance - Payroll	# of incorrect secondary job assignment	< 1	0	0	0	0	0	0	1	0	0	0	90%
Workman's Comp Incidents	# of incidents	< 1	0	0	0	0	0	0	0	0	0	0	100%
<b>3. Operations</b>													
Attendance Reporting	# of errors (details in the Reconciliation report)	≤ 1	2	8	8	3	1	0	0	0	0	0	60%
ADA & Attendance Rate	Example: 306.3 / 96.00%	≥ 96%	275.7 / 95.6%	273.7 / 94.6%	281.7 / 94.4%	249.9 / 94.2%	92 / 93.9%	297.2 / 95.2%	418.1 / 92.8%	293.3 / 95.2%	240.5 / 95.1%	102.6 / 95.9%	0%
Emergency Preparedness	Up to date with Annual Safety Expectations (Y or N)	> 100%	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	100%
Site Care (neat/clean/well maintained)	Is site organized : clean; in compliance (Y or N)	> 80%	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	100%
Site Safety & Risk Management (OSHA)	Is site in compliance with OSHA/Fire Code/ L.A.DBS Regulations (Y or N)	> 100%	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	100%
Maintenance	Is site current on site-specific Maintenance Schedule (Y or N)	> 80%	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	100%
<b>4. Data Team /IT</b>													
Data Submission Compliance	% of deadlines met	> 90%											
Data Submission Compliance	% of data submission is accurate	> 80%											
Data Submission Compliance	% of times SOP not followed (measured by # of Helpdesk tickets and emails re: same issue)	< 20%											
IT - Help Desk Requests	# of requests	N/A											
IT - Lap Top Cart	# of missing Laptops	0											
IT - Lap Top Cart	# of missing power adaptors	0											
IT - Lap Top Cart	# of broken power adaptors	0											
IT - Lap Top Cart	# of damaged/broken laptops	0											
IT - Lap Top Cart	Overall condition of cart (BELOW BASIC, BASIC, EXCELLENT)	Very good or above											
<b>5. Clinical Services</b>													
Clinical/School Counseling	# of cases	N/A	CCP-36; DIS-5	CCP-40; DIS-2	CCP-33; DIS-4	CCP-33; DIS-5	CCP-14; DIS-6	CCP-17; DIS-1	CCP-32; DIS-3	CCP-30; DIS-4	CCP-28; DIS-5	CCP-26; DIS-5	NA
IEP Cases	# of cases in Red or Yellow	0 Red or Yellow	1 in red	In Compliance	3 in yellow	3 in yellow	1 in red	2 in yellow	1 in red	2 in yellow	1 in yellow	2 in yellow	10%
			5 DIS clients, 12 % of total counseling clients are DIS	clients, 5 % of total counseling clients are DIS	4 DIS clients, 7 % of total counseling clients are DIS	5 DIS clients, 13 % of total counseling clients are DIS	6 DIS clients, 30 % of total counseling clients are DIS	1 DIS clients, 5 % of total counseling clients are DIS	3 DIS clients, 9 % of total counseling clients are DIS	clients, 12 % of total counseling clients are DIS	clients, 15 % of total counseling clients are DIS	clients, 16 % of total counseling clients are DIS	10%
<b>DIS Counseling Services</b>													
6. BIP/DVA/SES	% of services being provided	100%											
FSA: Lunch Program	% of ordered vs served	> 95%	99% SNK	97% SNK	87%	93%	100% BRKFST & SNK	99%	97%	97% SNK	100%	99%	90%
ASES Attendance:	Attendance Rate	> 85%	YPI	79%	87%	108%	in cal's #	77%	YPI	71%	N/A	N/A	80%

**BYLAWS**  
**OF**  
**PARTNERSHIPS TO UPLIFT COMMUNITIES LOS ANGELES**



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**BYLAWS  
OF  
PARTNERSHIPS TO UPLIFT COMMUNITIES LOS ANGELES**

**ARTICLE I  
Purposes**

The corporation is organized for the public and educational purposes as specified in its Articles of Incorporation.

**ARTICLE II  
Offices**

**Section 1. Principal Office.**

The corporation's principal office shall be located at 111 N. First Street, Suite 100, Burbank, California 91502. The Board of Trustees ("Board" or "Governing Board") is granted full power and authority to change the principal office from one location to another within California.

**Section 2. Other Offices.**

Branch or subordinate offices may at any time be established by the Board at any place or places where the corporation is qualified to do business.

**ARTICLE III  
Membership**

**Section 1. No Members.**

Unless and until these bylaws are amended to provide otherwise, this corporation shall have no statutory members, as the term "member" is defined in Section 5056 of the California Nonprofit Corporation Law. Any action which would otherwise by law require approval by a majority of all members or approval by the members shall require only approval of the Board. All rights which would otherwise by law vest in the members shall rest in the Board.

**Section 2. Associates.**

Nothing in this Article shall be construed to limit the corporation's right to refer to persons associated with it as "members" even though such persons are not members, and no such reference by the corporation shall render anyone a member within the meaning of Section 5056 of the California Nonprofit Corporation Law. Such individuals may originate and take part in the discussion of any subject that may properly come before any meeting of the Board, but may not vote. The corporation may confer, by amendment of its Articles of Incorporation or of these Bylaws, some or all of a member's rights, set forth in the California Nonprofit Corporation Law, upon any person who does not have the right to vote for the election of trustees/directors, on a disposition of substantially all of the assets of the corporation, on a merger, on a dissolution,



or on changes to the corporation's Articles of Incorporation or Bylaws, but no such person shall be a member within the meaning of said Section 5056.

#### ARTICLE IV Board of Trustees

##### Section 1. Powers.

Subject to the limitations of the California Nonprofit Public Benefit Corporation Law, the corporation's Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may delegate the management of the corporation's activities to any person(s), management company or committees, however composed, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may rescind any such assignment, referral or delegation at any time.

Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

- i. To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; to fix their compensation; and to require security from them for faithful service;
- ii. To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefor which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws;
- iii. To adopt, make and use a corporate seal and to alter the form of the seal from time to time;
- iv. To borrow money and incur indebtedness for the purposes of the corporation, and to cause to be executed and delivered therefor, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations and other evidences of debt and securities therefore;
- v. To carry on a business and apply any revenues in excess of expenses that results from the business activity to any activity in which it may lawfully engage;
- vi. To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust;

vii. To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property; and

viii. To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose.

## Section 2. Number and Qualifications of Trustees.

i. Subject to subsection ii. below, the authorized number of trustees shall be seven (7), unless changed by a duly adopted amendment to this provision.

ii. Subject to subsection iii. below, all seven (7) trustees on the Board shall be the same individuals who are trustees on the boards of trustees of Partnerships to Uplift Communities Valley ("PUC Valley") and Partnerships to Uplift Communities Lake View Terrace ("PUC LVT"). (This corporation, PUC Valley and PUC LVT are sometimes hereinafter referred to as the "Affiliated Corporation(s).")

iii. Notwithstanding subsection ii. above, if the boards of trustees of all of the Affiliated Corporations mutually agree to have either one (1) or two (2) trustees on their respective boards be individuals from the geographic community served by the charter schools operated by the applicable Affiliated Corporation ("Community Trustee(s)"), then the board of each Affiliated Corporation may select the agreed-upon number of Community Trustee(s) to serve on its board.

iv. The qualifications for trustees are generally the ability to attend Board meetings, a willingness to actively support and promote Partnerships to Uplift Communities Los Angeles and its multi-site charter schools, and a dedication to its educational endeavors; provided that Los Angeles Unified School District may, but is not obligated to, appoint a non-voting member to the Board.

## Section 3. Appointment and Term of Office.

i. Trustees shall be selected at an annual meeting of the Board by the trustees holding office on and as of the date of such meeting.

ii. Trustees shall hold office for a term of two (2) years, or until a successor has been elected and qualified, unless the trustee has been removed from office.

## Section 4. Trustee Approval of Certain Corporate Actions.

The Board must approve the following actions:

i. the annual budget of the corporation;

ii. any non-budgeted expenditures of the corporation over \$25,000;



- iii. any initial contract for the establishment or operation of, or licensing of rights to, a charter school;
- iv. the removal of trustees/directors without cause pursuant to Section 5222 of the California Corporations Code;
- v. the approval of the sale, lease, conveyance, exchange, transfer, or other disposition of all or substantially all of the assets of the corporation;
- vi. the approval of the principal terms of a merger of the corporation with another organization;
- vii. the approval of the filing of a petition for the involuntary dissolution of the corporation if statutory grounds for such a dissolution exist;
- viii. the approval of the voluntary dissolution of the corporation or the revocation of such an election to dissolve it; and
- ix. the approval of any borrowing of money.

#### Section 5. Resignation and Removal.

- i. Subject to the provisions of Section 5226 of the California Nonprofit Public Benefit Corporation Law, any trustee may resign effective upon giving written notice to the Chair (or president), the secretary, or the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be selected before such time, to take office when the resignation becomes effective.
- ii. Subject to compliance with Section 5222 of the California Nonprofit Public Benefit Corporation Law, any or all trustees may be removed without cause.
- iii. Notwithstanding anything to the contrary in this Article, the Board may declare vacant the office of any trustee who has been convicted of a felony, or has been found to have breached any duty arising under Article 3 of Chapter 2 of the California Nonprofit Public Benefit Corporation Law or to be of unsound mind by any court of competent jurisdiction, or as additionally permitted or provided under Section 5221 of the California Nonprofit Public Benefit Corporation Law.

#### Section 6. Vacancies.

- i. A Board vacancy or vacancies shall be deemed to exist if any trustee dies, resigns, or is removed, or if the authorized number of trustees is increased.
- ii. A vacancy on the Board shall be filled only by resolution of the Board and in accordance with the provisions of this Article IV. Each trustee so elected, appointed, or designated shall hold office until the expiration of the term of the replaced trustee and continue to hold office until a qualified successor has been elected, appointed, or designated, unless the trustee has been removed from office.

iii. No reduction of the authorized number of trustees shall have the effect of removing any trustee prior to the expiration of the trustee's term of office.

#### Section 7. Place of Meeting.

Meetings of the Board shall be held at the principal office of the corporation or at any other place within or without the State of California which has been designated in the notice of the meeting or, if there is no notice, by resolution of the Board.

#### Section 8. Annual Meeting.

Annually the Board shall meet for the purpose of organization, appointment of officers and the transaction of such other business as may properly be brought before the meeting. This meeting shall be held at a time, date and place as may be specified and noticed by resolution of the Board.

#### Section 9. Regular Meetings.

Regular meetings of the Board, including annual meetings, shall be held without call or notice at such times and places as may from time to time be fixed by the Board. Notwithstanding any other provision of these bylaws, to the extent expressly required by law or by contract, all meetings (regular and special) of the Board and its committees shall be called, noticed, and held in compliance with the provisions of the Ralph M. Brown Act (California Government Code Section 54950 *et seq.*) ("Brown Act").

#### Section 10. Special Meetings.

Special meetings of the Board for any purpose may be called at any time by the chair (or president), the secretary or any two trustees. The party calling such special meeting shall determine the place, date and time thereof.

#### Section 11. Notice of Special Meetings.

i. Special meetings of the Board may be held only after each trustee has received four (4) days' prior notice by first-class mail or forty-eight (48) hours' notice given personally or by telephone, including a voice messaging system or other system or technology designed to record and communicate messages, telegraph, facsimile, electronic mail, or other electronic means, provided that such notice otherwise complies with the Brown Act.

ii. Any such notice shall be addressed or delivered to each trustee at the trustee's address as it is shown on the records of the corporation or as may have been given to the corporation by the trustee for purposes of notice or, if an address is not shown on the corporation's records or is not readily ascertainable, at the place at which the meetings of the trustees are regularly held.

iii. Notice by mail shall be deemed received at the time a properly addressed written notice is deposited in the United States mail, postage prepaid. Any other written notice shall be deemed received at the time it is personally delivered to the recipient or is delivered to a



common carrier for transmission, or is actually transmitted by the person giving the notice by electronic means to the recipient. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.

iv. The notice of special meeting shall state the time of the meeting, and the place if the place is other than the principal office of the corporation, and the general nature of the business proposed to be transacted at the meeting. No business, other than the business the general nature of which was set forth in the notice of the meeting, may be transacted at a special meeting.

#### Section 12. Quorum.

A majority of the trustees then in office shall constitute a quorum. Every act or decision done or made by a majority of the trustees present at a meeting duly held at which a quorum is present is an act of the Board. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of trustees, if any action taken is approved by at least a majority of the required quorum for such meeting. Trustees may not vote by proxy.

#### Section 13. Consent to Meetings.

Except as otherwise may be provided in the Brown Act, the transactions of the Board at any meeting, however called and noticed or wherever held, shall be as valid as though done at a meeting duly held after regular call and notice if a quorum be present, and if, either before or after the meeting, each trustee entitled to vote, not present in person signs a written waiver of notice, or a consent to the holding of such meeting, or approval of the minutes thereof. All such waivers, consents or approvals shall be filed with the corporate records and made a part of the minutes of the meeting. Notice of a meeting need not be given to any trustee who attends the meeting without protesting prior to or at the commencement of the meeting, the lack of notice to such trustee.

#### Section 14. Action Without Meeting.

Except as otherwise may be provided in the Brown Act, any action required or permitted to be taken by the Board under any provision of the Nonprofit Public Benefit Corporation Law may be taken without a meeting if all members of the Board shall individually or collectively consent in writing to such action. Such consent(s) shall be filed with the minutes of the proceedings of the Board and shall have the same force and effect as a unanimous vote of such trustees.

#### Section 15. Telephonic and Electronic Video Meetings.

To the extent permitted under and in conformance with the Brown Act, members of the Board may participate in a meeting through the use of conference telephone, electronic video screen communication, or other communications equipment. Participation in a meeting through use of conference telephone constitutes presence in person at that meeting as long as all



members participating in the meeting are able to hear one another. Participation in a meeting through use of electronic video screen communication or other communications equipment (other than conference telephone) constitutes presence in person at that meeting if (i) each member participating can communicate with all other members concurrently, (ii) each member is provided the means of participating in all matters before the Board including, without limitation, the capacity to propose, or to interpose an objection to, specific action to be taken, and (iii) the corporation has adopted and implemented some means of verifying both that the person participating in the meeting is a trustee or other person entitled to participate in the meeting and that all actions of, or votes by, the Board are taken or cast only by the trustees and not by persons who are not trustees.

#### Section 16. Adjournment.

A majority of the trustees present, whether or not a quorum is present, may adjourn any trustees meeting to another time or place. If a meeting is adjourned for more than twenty-four (24) hours, notice of such adjournment to another time or place shall be given, prior to the time schedule for the continuation of the meeting, to the trustees who were not present at the time of the adjournment.

#### Section 17. Rights of Inspection.

Subject to applicable federal and state laws regarding pupil confidentiality, every trustee has the absolute right at any reasonable time to inspect and copy all books, records, and documents of every kind and to inspect the physical properties of the corporation.

#### Section 18. Board Committees.

The Board may appoint an executive committee and one or more other committees each consisting of two (2) or more trustees to serve at the pleasure of the Board, and delegate to such committee any of the authority of the Board, except with respect to:

- a. The approval any action for which the California Nonprofit Public Benefit Corporation Law requires the approval of members, notwithstanding the fact that the corporation does not have members;
- b. The filling of vacancies on the Board or on any committee which has the authority of the Board;
- c. The fixing of compensation of the trustees for serving on the Board or on any committee;
- d. The amendment or repeal of bylaws or the adoption of new bylaws;
- e. The amendment or repeal of any resolution of the Board which by its express terms is not so amendable or repealable;
- f. The appointment of other committees having the authority of the Board;



g. The expenditure of corporate funds to support a nominee for trustee after there are more people nominated for trustee than can be elected; or

h. The approval of any self-dealing transaction as such transactions are defined in Section 5233(a) of the California Nonprofit Public Benefit Corporation Law, except as permitted under Section 24 of this Article.

Any such committee must be created, and the members thereof appointed, by resolution adopted by a majority of the number of trustees then in office, and any such committee may be designated as an executive committee or by such other name as the Board shall specify. The Board may appoint, in the same manner, alternate members to a committee who may replace any absent member at any meeting of the committee. Notwithstanding the foregoing, if the executive committee (or any other committee) is authorized to exercise the authority of the Board, such committee shall not include as members persons who are not trustees; provided that the Board may create other committees that do not exercise the authority of the Board and such other committees may include persons who are not trustees. The Board shall have the power to prescribe the manner in which proceedings of any such committee shall be conducted. In the absence of any such prescription, such committee shall have the power to prescribe the manner in which its proceedings shall be conducted. Unless the Board, such committee, or these bylaws shall otherwise provide, the regular and special meetings and other actions of any such committee shall be governed by the provisions of this Article IV applicable to meetings and actions of the Board. Minutes shall be kept of each meeting of each committee.

#### Section 19. Other Committees.

a. The president, subject to the limitations imposed by the Board, or the Board, may create other committees, either standing or special, to serve the Board which do not have the powers of the Board. The president, with the approval of the Board, shall appoint members to serve on such committees, and shall designate the committee chair. If a trustee is on a committee, he or she shall be the committee chair. Each member of a committee shall continue as such until the next annual election of officers and until his or her successor is appointed, unless the member sooner resigns or is removed from the committee.

b. Meetings of a committee may be called by the president, the chair of the committee or a majority of the committee's voting members. Each committee shall meet as often as is necessary to perform its duties. Notice of a meeting of a committee may be given at any time and in any manner reasonably designed to inform the committee members of the time and place of the meeting. A majority of the voting members of a committee shall constitute a quorum for the transaction of business at any meeting of the committee. Each committee may keep minutes of its proceedings and shall report periodically to the Board. A committee may take action by majority vote.

c. Any member of a committee may resign at any time by giving written notice to the president. Such resignation, which may or may not be made contingent upon formal acceptance, shall take effect upon the date of receipt or at any later time specified in the notice. The president may, with prior approval of the Board, remove any appointed member of a committee. The president, with the Board's approval, shall appoint a member to fill a vacancy in



any committee or any position created by an increase in the membership for the unexpired portion of the term.

Section 20. Fees and Compensation.

Trustees and members of committees shall not receive any compensation for their services; however, the Board may approve reimbursement of a trustee's actual and necessary expenses incurred in the conduct of the corporation's business.

Section 21. Nonliability of Trustees.

Except as otherwise required by the Nonprofit Public Benefit Corporation Law, no trustee shall be personally liable for the debts, liabilities or other obligations of this corporation.

Section 22. Interested Persons.

Not more than forty-nine percent (49%) of the trustees serving on the Board may be "interested persons." An "interested person" is (i) any person compensated by the corporation for services rendered to it within the previous twelve (12) months whether as a full- or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a trustee as trustee, and (ii) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law or father-in-law of any such person. However, any violation of the provisions of this Section shall not affect the validity or enforceability of any transaction entered into by the corporation.

Section 23. Standard of Care.

A trustee shall perform the duties of a trustee, including duties as a member of any committee of the Board upon which the trustee may serve, in good faith, in a manner such trustee believes to be in the best interests of the corporation and with such care, including reasonable inquiry, as an ordinarily prudent person in a like position would use under similar circumstances. In performing the duties of a trustee, a trustee shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

- i. One or more officers or employees of the corporation whom the trustee believes to be reliable and competent in the matters presented;
- ii. Counsel, independent accountants or other persons as to matters which the trustee believes to be within such person's professional or expert competence; or
- iii. A committee of the Board upon which the trustee does not serve that is composed exclusively of any or any combination of trustees, or persons described in i. above or persons described in ii. above as to matters within its designated authority, provided the trustee believes merits confidence and the trustee acts in good faith, after reasonable inquiry when the need therefor is indicated by the circumstances and without knowledge that would cause such reliance to be unwarranted.

## Section 24. Self-Dealing Transactions.

Except as provided in subsection a. below, a self-dealing transactions means transactions to which the corporation is a party and in which one or more of the trustees (“interested trustee(s)”) has a material financial interest and which does *not* meet the requirements of subsection b.i, ii., or iii. below.

a. A self-dealing transaction does not include:

i. An action by the Board fixing the compensation of a trustee as a trustee or officer of the corporation.

ii. A transaction which is part of a public or charitable program of the corporation if the transaction is (A) approved or authorized by the corporation in good faith and without unjustified favoritism, and (B) results in a benefit to one or more trustees or their families because they are in a class of persons intended to be benefited by the public or charitable program.

iii. A transaction of which the interested trustees have no actual knowledge, and which does not exceed the lesser of one percent (1%) of the corporation’s gross receipts for the preceding fiscal year or One Hundred Thousand Dollars (\$100,000).

b. None of the remedies available under Section 5233(h) of the California Nonprofit Public Benefit Corporation Law will be granted to a party permitted to bring an action under Section 5233(c) of the California Nonprofit Public Benefit Corporation Law (with respect to a self-dealing transaction), if:

i. The Attorney General, or the court in an action in which the Attorney General is an indispensable party, has approved the transaction before or after it was consummated; *or*

ii. The following facts are established:

(A) The corporation entered into the transaction for its own benefit;

(B) The transaction was fair and reasonable as to the corporation at the time the corporation entered into the transaction;

(C) Prior to consummating the transaction or any part thereof, the Board authorized or approved the transaction in good faith by vote of a majority of the trustees then in office without counting the vote of the interested trustee(s), and with knowledge of the material facts concerning the transaction and the interested trustee’s interest in the transaction. Except as provided in subsection b.iii. below, action by a committee of the Board will not satisfy this requirement; and

(D)(I) Prior to authorizing or approving the transaction, the Board considered and in good faith determined after reasonable investigation under the circumstances that the corporation could not have obtained a more advantageous arrangement with reasonable



effort under the circumstances, or (II) the corporation in fact could not have obtained a more advantageous arrangement with reasonable effort under the circumstances; *or*

iii. The following facts are established:

(A) A committee or person authorized by the Board approved the transaction in a manner consistent with the standards prescribed for approval by the Board under subsection b.ii above;

(B) It was not reasonably practical to obtain approval of the Board prior to entering into the transaction; and

(C) The Board, after determining in good faith that the conditions set forth in subparagraphs (A) and (B) of this subsection b.iii were satisfied, ratified the transaction at its next meeting by a vote of a majority of the trustees then in office without counting the vote of the interested trustee(s).

#### Section 25. Interested Trustee's Vote.

In determining whether the Board validly met to authorize or approve a self-dealing transaction, interested trustees may be counted to determine the presence of a quorum, but an interested trustee's vote may not be counted toward the required majority for such authorization, approval or ratification.

#### Section 26. Persons Liable and Extent of Liability.

If a self-dealing transaction has not been approved as provided in Section 24 of this Article, the interested trustee(s) may be required to do such things and pay such damages as a court may provide as an equitable and fair remedy to the corporation, considering any benefit received by it and whether or not the interested trustee(s) acted in good faith and with the intent to further the best interests of the corporation.

#### Section 27. Contracts or Transactions With Mutual Trustees.

No contract or other transaction between the corporation and any domestic or foreign corporation, firm or association of which one or more of the corporation's trustees are trustees is either void or voidable because such trustee(s) are present at the meeting of the Board or committee thereof which authorizes, approves or ratifies the contract or transaction if:

i. The material facts as to the transaction and as to such trustee's other directorship are fully disclosed or known to the Board or committee, and the Board or committee authorizes, approves or ratifies the contract or transaction in good faith by a vote sufficient without counting the vote of the common trustee(s); or

ii. As to contracts or transactions not approved as provided in subsection i. of this Section, the contract or transaction is just and reasonable as to the corporation at the time it is authorized, approved or ratified.



Notwithstanding the foregoing, this Section shall not apply to self-dealing transactions described in Section 24 of this Article above.

Section 28. Corporate Loans and Advances.

The corporation shall not make any loan of money or property to or guarantee the obligation of any trustee or officer, unless approved by the Attorney General; provided, however, that the corporation may advance money to a trustee or officer of the corporation or any subsidiary for expenses reasonably anticipated to be incurred in the performance of the duties of such officer or trustee, if, in the absence of such advance, such trustee or officer would be entitled to be reimbursed for such expenses by the corporation, its parent or any subsidiary.

Section 29. Annual Report.

Pursuant to Section 6321 of the California Nonprofit Public Benefit Corporation Law, the chief financial officer shall cause an annual report to be prepared and sent to each trustee not later than 120 days after the close of the fiscal year. Such annual report shall be prepared in conformity with the requirements of the California Nonprofit Public Benefit Corporation Law as it may be in effect from time to time.

Section 30. Annual Statement of Certain Transactions and Indemnifications.

Pursuant to Section 6322 of the California Nonprofit Public Benefit Corporation Law, the corporation shall furnish an annual statement of certain transactions and indemnifications to each of the trustees no later than 120 days after the close of the fiscal year. If the corporation issues an annual report as set forth in Section 29 of this Article above, this requirement shall be satisfied by including the required information, as set forth below, in such report. Such annual statement shall describe:

i. Any “covered transaction” (defined below) during the previous fiscal year of the corporation involving (a) more than Fifty Thousand Dollars (\$50,000) or, (b) which was one of a number of “covered transactions” in which the same “interested person” (defined below) had a direct or indirect material financial interest, and which transactions in the aggregate involved more than Fifty Thousand Dollars (\$50,000). The statement shall describe the names of any “interested persons” involved in such covered transactions, including such “interested persons” relationship to the transaction, the nature of such person’s interest in the transaction and, where practicable, the amount of such interest; provided, that in the case of a transaction with a partnership of which the “interested person” is only a partner, only the interest of the partnership need be stated.

ii. For the purposes of this Section, a “covered transaction” is a transaction in which the corporation, its parent or its subsidiary, was a party, and in which either of the following had a direct or indirect material financial interest:

(a) Any trustee or officer of the corporation, or its parent or subsidiary; or

(b) Any holder of more than ten percent (10%) of the voting power of the corporation, its parent or its subsidiary.



iii. The amount and circumstances of any indemnifications or advances aggregating more than Ten Thousand Dollars (\$10,000) paid during the fiscal year of the corporation to any officer or trustee of the corporation.

For purposes of this Section, any person described in either paragraph (a) or (b) of subsection ii. above is an “interested person.”

#### Section 31. Property Rights.

No trustee shall have any right or interest in any of the corporation’s property or assets.

#### Section 32. General Public Agency Prohibitions Governing Certain Transactions.

Notwithstanding the foregoing Sections, nothing in this Article IV shall be construed to authorize any transaction otherwise prohibited by California Government Code Section 81000 et seq., or other applicable laws.

### ARTICLE V Officers

#### Section 1. Officers.

The officers of this corporation shall be a president, one or more vice presidents, a secretary, and a chief financial officer (treasurer). The corporation may also have, at the discretion of the Board, one or more assistant secretaries, one or more assistant treasurers, and such other officers as may be elected or appointed by the Board. Any number of offices may be held by the same person, except that neither the secretary nor the treasurer may serve concurrently as the chair (or president).

#### Section 2. Appointment of Officers.

Except as otherwise specified in Sections 3 and 9 of this Article, the officers of the corporation shall be chosen annually by the Board and each shall hold office until he or she shall resign or shall be removed or otherwise disqualified to serve, or his or her successor shall be elected and qualified.

#### Section 3. Subordinate Officers.

The Board may appoint and may empower the president to appoint such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in the bylaws or as the Board may from time to time determine.

#### Section 4. President.

The president is the chief executive officer of the corporation and has general supervision, direction and control of the business and affairs of the corporation. The president

has the general management powers and duties usually vested in the office of a president of a corporation, as well as such other powers and duties as may be prescribed from time to time by the Board. The president shall be an ex officio voting member of each Board committee.

#### Section 5. Vice President.

In the absence or disability of the president, the vice president (or if more than one (1) vice president is appointed, in order of their rank as fixed by the Board or if not ranked, the vice president designated by the Board) shall perform all the duties of the president and when so acting shall have all the powers of, and be subject to all of the restrictions upon, the president. The vice president shall have such other powers and perform such other duties as the Board may prescribe from time to time.

#### Section 6. Secretary.

The secretary shall keep or cause to be kept, at the principal office of the corporation the State of California, the original or a copy of the corporation's Articles of Incorporation and bylaws, as amended to date, and a register showing the names of all trustees and their respective addresses. The secretary shall keep the seal of the corporation and shall affix the same on such papers and instruments as may be required in the regular course of business, but failure to affix it shall not affect the validity of any instrument. The secretary also shall keep or cause to be kept at the principal office, or at such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, with the time and place of holding; whether regular or special; if special how authorized; the notice thereof given; the names of those present and absent; and the proceedings thereof. The secretary shall give or cause to be given notice of all the meetings of the Board required by these bylaws or by law to be given; shall keep the seal of the corporation in safe custody; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the treasurer; and shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.

#### Section 7. Chief Financial Officer.

The chief financial officer shall keep and maintain or cause to be kept and maintained adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts, disbursements, gains and losses. The books of account shall at all times be open to inspection by any trustee. The chief financial officer shall deposit or cause to be deposited all monies and other valuables in the name and to the credit of the corporation in such depositories as may be designated by the Board. The chief financial officer shall disburse the funds of the corporation as shall be ordered by the Board, shall render to the president and the trustees, upon request, an account of all transactions as chief financial officer. The chief financial officer shall present an operating statement and report, since the last preceding board meeting, to the Board at all regular meetings. The chief financial officer shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.



## Section 8. Removal and Resignation.

Any officer may be removed, either with or without cause, by the Board at any time. In the case of an officer appointed by the president, the president shall also have the power of removal. Any such removal shall be without prejudice to the rights, if any, of the officer under any contract of employment. Any officer may resign at any time by giving written notice to the corporation, but without prejudice to the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the receipt of such notice or at any later time specified therein, and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

## Section 9. Vacancies.

A vacancy in any office because of death, resignation, removal, disqualification, or any other cause, shall be filled in the manner prescribed in the bylaws for regular election or appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

# ARTICLE VI Indemnification

## Section 1. Definitions.

For the purposes of this Article, “agent” means any person who is or was a trustee, director, officer, or employee of this corporation, or is or was serving at the request of the corporation as a trustee, director, officer, employee or agent of another foreign or domestic corporation, partnership, joint venture, trust or other enterprise, or was a trustee, director, officer, employee or agent of a foreign or domestic corporation which was a predecessor corporation of this corporation or of another enterprise at the request of such predecessor corporation; and “proceeding” means any threatened, pending completed action or proceeding, whether civil, criminal, administrative or investigative; and “expenses” includes, without limitation, attorneys’ fees and any expenses of establishing a right to indemnification under Sections 4 or 5b. of this Article.

## Section 2. Indemnification in Actions by Third Parties.

This corporation may indemnify any person who was or is a party or is threatened to be made a party to any proceeding (other than an action by or in the right of this corporation to procure a judgment in its favor, an action brought under Section 5233 of the California Nonprofit Public Benefit Corporation Law, or an action brought by the Attorney General or a person granted relator status by the Attorney General for any breach of duty relating to assets held in charitable trust) by reason of the fact that such person is or was an agent of this corporation, against expenses, judgments, fines, settlements and other amounts actually and reasonably incurred in connection with such proceeding if such person acted in good faith and in a manner such person reasonably believed to be in the best interests of this corporation, and, in the case of a criminal proceeding, had no reasonable cause to believe the conduct of such person was unlawful. The termination of any proceeding by judgment, order, settlement, conviction or upon a plea of *nolo contendere* or its equivalent shall not, of itself, create a presumption that the



person did not act in good faith and in a manner which the person reasonably believed to be in the best interests of this corporation or that the person had reasonable cause to believe that the person's conduct was unlawful.

### Section 3. Indemnification in Actions by or in the Right of the Corporation.

This corporation may indemnify any person who was or is a party or is threatened to be made a party to any threatened, pending or completed action by or in the right of this corporation, or brought under Section 5233 of the California Nonprofit Public Benefit Corporation Law, or brought by the Attorney General or a person granted regulator status by the Attorney General for breach of duty relating to assets held in charitable trust, to procure a judgment in its favor by reason of the fact that such person is or was an agent of the corporation, against expenses actually and reasonably incurred by such person in connection with the defense or settlement of such action if such person acted in good faith, in a manner such person believed to be in the best interests of the corporation and with such care, including reasonable inquiry, as an ordinarily prudent person in a like position would use under similar circumstances. No indemnification shall be made under this Section:

i. In respect of any claim, issue or matter as to which such person shall have been adjudged to be liable to this corporation in the performance of such person's duty to the corporation, unless and only to the extent that the court in which such proceeding is or was pending shall determine upon application that, in view of all the circumstances of the case, such person is fairly and reasonably entitled to indemnity for the expenses which such court shall determine;

ii. Of amounts paid in settling or otherwise disposing of a threatened or pending action, with or without court approval; or

iii. Of expenses incurred in defending a threatened or pending action which is settled or otherwise disposed of without court approval, unless it is settled with the approval of the Attorney General.

### Section 4. Indemnification Against Expenses.

To the extent that an agent of this corporation has been successful on the merits in defense of any proceeding referred to in Sections 2 or 3 of this Article or in defense of any claim, issue or matter therein, the agent shall be indemnified against expenses actually and reasonably incurred by the agent in connection therewith.

### Section 5. Required Determinations.

Except as provided in Section 4 of this Article, any indemnification under this Article shall be made by this corporation only if authorized in the specific case, upon a determination that indemnification of the agent is proper in the circumstances because the agent has met the applicable standard of conduct set forth in Sections 2 or 3 of this Article by:

a. A majority vote of a quorum consisting of trustees who are not parties to such proceeding; or



b. The court in which such proceeding is or was pending upon application made by this corporation or the agent or the attorney or other person rendering services in connection with the defense, whether or not such application by the agent, attorney or other person is opposed by this corporation.

Section 6. Advance of Expenses.

Expenses incurred in defending any proceeding may be advanced by this corporation prior to the final disposition of such proceeding upon receipt of an undertaking by or on behalf of the agent to repay such amount unless it shall be determined ultimately that the agent is entitled to be indemnified as authorized in this Article.

Section 7. Other Indemnification.

No provision made by this corporation to indemnify its or its subsidiary's trustees, directors or officers for the defense of any proceeding, whether contained in the Articles of Incorporation, bylaws, a resolution of members or trustees/directors, an agreement, or otherwise, shall be valid unless consistent with this Article. Nothing contained in this Article shall affect any right to indemnification to which persons other than such trustees/directors and officers may be entitled by contract or otherwise.

Section 8. Forms of Indemnification Not Permitted.

No indemnification or advance shall be made under this Article, except as provided in Sections 4 or 5b., in any circumstances where it appears:

a. That it would be inconsistent with a provision of the Articles of Incorporation, these bylaws, or an agreement in effect at the time of the accrual of the alleged cause of action asserted in the proceeding in which the expenses were incurred or other amounts were paid, which prohibits or otherwise limits indemnification; or

b. That it would be inconsistent with any condition expressly imposed by a court in approving a settlement.

Section 9. Insurance.

The corporation shall have the power to purchase and maintain insurance on behalf of any agent of this corporation against any liability asserted against or incurred by the agent in such capacity or arising out of the agent's status as such whether or not this corporation would have the power to indemnify the agent against such liability under the provisions of this Article; provided, however, that this corporation shall have no power to purchase and maintain such insurance to indemnify any agent of the corporation for a violation of Section 5233 of the California Nonprofit Public Benefit Corporation Law.

Section 10. Nonapplicability to Fiduciaries of Employee Benefit Plans.

This Article does not apply to any proceeding against any trustee, investment manager or other fiduciary of an employee benefit plan in such person's capacity as such, even

though such person may also be an agent of the corporation as defined in Section 1 of this Article. The corporation shall have power to indemnify such trustee, investment manager or other fiduciary to the extent permitted by subdivision (f) of Section 207 of the California General Corporation Law.

Section 11. Indemnification and the California Tort Claims Act.

Notwithstanding any other provision of this Article VI, the corporation shall have the right and obligation to insure, defend, and indemnify the corporation's employees, officers, and trustees/directors for all claims brought pursuant to the California Tort Claims Act (Government Code Section 810, et seq.) to the fullest extent allowed under such Act, if applicable.

ARTICLE VII  
Miscellaneous

Section 1. Fiscal Year.

The fiscal year of the corporation shall be a fiscal year ending June 30.

Section 2. Inspection of Corporate Records.

The books of account and minutes of the proceedings of the Board, and of any executive committee or other committees of the trustees, shall be open to inspection at any reasonable time upon the written demand of any member of the Board. Such inspection may be made in person or by an agent or attorney, and shall include the right to make photocopies and extracts.

Section 3. Checks, Drafts, Etc.

All checks, drafts or other orders for payment of money, notes or other evidences of indebtedness issued in the name of or payable to the corporation and any and all securities owned by or held by the corporation requiring signature for transfer shall be signed or endorsed by such person or persons and in such manner as from time to time shall be determined by the Board or the executive committee, if any, or by the Chair (or president).

Section 4. Endorsement or Execution of Documents and Contracts.

Subject to the provisions of applicable law, any note, mortgage, evidence of indebtedness, contract, conveyance or other instrument in writing and any assignment or endorsement thereof executed or entered into between the corporation and any other person, when signed by the president, certain designated vice-presidents, the secretary or the chief financial officer of the corporation, shall be valid and binding on the corporation in the absence of actual knowledge on the part of the other person that the signing officer(s) had no authority to execute the same. Additionally, by resolution of the Board, general signatory authority may be granted and delegated to other persons on behalf of the corporation. Any such instruments may be signed by any other person or persons and in such manner as from time to time shall be determined by the Board or the Chair (or president). Unless so authorized, no officer, agent or



employee shall have any power or authority to bind the corporation to any contract or engagement or to pledge its credit or to render it liable for any purpose or amount.

## ARTICLE VIII Effective Date and Amendments

### Section 1. Effective Date.

These bylaws shall become effective immediately upon their adoption by the incorporator(s) or by the vote of a majority of the Board. Subject to Section 2 of this Article, amendments to these bylaws shall become effective immediately upon their adoption, unless the Board directs otherwise.

### Section 2. Amendments.

Subject to the approval of the boards of trustees of Partnerships to Uplift Communities Valley and Partnerships to Uplift Communities Lake View Terrace of any amendments to Sections 2, 3, 4, 5 and/or 6 of Article IV of these bylaws, these bylaws may be amended or repealed and new bylaws adopted only by the vote of a majority of trustees then in office.

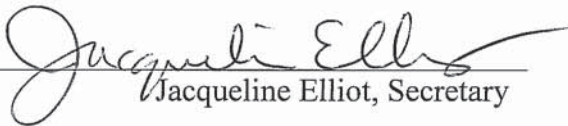
## CERTIFICATE OF ADOPTION

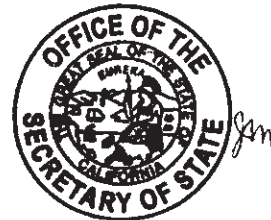
I, the undersigned, do hereby certify:

That I am the Secretary of Partnerships to Uplift Communities Los Angeles.

That the foregoing bylaws constitute the bylaws of such corporation as duly adopted by the corporation's Board of Trustees on June 16, 2010.

Date: June 16, 2010

  
Jacqueline Elliot, Secretary



**State of California**  
Secretary of State

I, DEBRA BOWEN, Secretary of State of the State of California, hereby certify:

That the attached transcript of 2 page(s) has been compared with the record on file in this office, of which it purports to be a copy, and that it is full, true and correct.



**IN WITNESS WHEREOF**, I execute this certificate and affix the Great Seal of the State of California this day of

SEP 17 2008

DEBRA BOWEN  
Secretary of State

SEP 17 2008

**ARTICLES OF INCORPORATION  
OF  
PARTNERSHIPS TO UPLIFT COMMUNITIES LOS ANGELES**

**I.**

The name of this corporation is Partnerships to Uplift Communities Los Angeles.

**II.**

A. This corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for charitable purposes.

B. The specific purposes of this corporation are:

- (1) To advance the education and training of young men and women;
- (2) To manage, operate, guide, direct, and promote charter schools; and,
- (3) To undertake and perform any and all activities as may be proper in connection with this corporation's general and specific purposes.

**III.**

The name and address in the State of California of this corporation's initial agent for service of process is:

Refugio Rodriguez  
111 N. First Street Suite 100  
Burbank, CA 91502

**IV.**

A. This corporation is organized and operated exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended.

B. No substantial part of the activities of this corporation shall consist of carrying on propaganda, or otherwise attempting to influence legislation, and this corporation shall not participate or intervene in any political campaign (including publishing or distribution of statements) on behalf of any candidate for public office.

V.

A. The property of this corporation is irrevocably dedicated to charitable purposes meeting the requirements for exemption provided by Section 501(c)(3) of the Internal Revenue Code of 1986 and Section 214 of the California Revenue and Taxation Code. No part of the net income or assets of this corporation shall ever inure to the benefit of any of its directors, trustees, officers, private shareholders or members, or to any private person.

B. Upon the dissolution or winding-up of this corporation, after paying or adequately providing for this corporation's debts and obligations, its remaining assets shall be distributed to a nonprofit fund, foundation, or corporation which is organized and operated exclusively for charitable purposes, has established its tax-exempt status under Section 501(c)(3) of the Internal Revenue Code of 1986 and under Section 23701d of the California Revenue and Taxation Code, and meets the requirements for exemption provided by Section 214 of the California Revenue and Taxation Code.

VI.

Notwithstanding any other provision of these Articles, this corporation shall not carry on any other activities not permitted to be carried on by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or by a corporation contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, as amended.

Dated: September 16, 2008

  
Mary K. Norvell, Incorporator



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 11 2005

PARTNERSHIPS TO UPLIFT  
COMMUNITIES INC  
C/O JACQUELINE ELLIOTT  
7518 SALE AVENUE  
WEST HILLS, CA 91307

Employer Identification Number:

74-3102820

DLN:

17053169033044

Contact Person:

CHERYL RICHMOND

ID# 52492

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

June 30

Public Charity Status:

170(b)(1)(A)(ii)

Form 990 Required:

Yes

Effective Date of Exemption:

January 29, 2003

Contribution Deductibility:

Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)



PARTNERSHIPS TO UPLIFT

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in dark ink, appearing to read "Lois G. Lerner", with a stylized flourish at the end.

Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

**JACQUELINE ELLIOT, Ed.D**  
**Founder and Chief Executive Officer**  
**Partnerships to Uplift Communities**  
**818-4021711 (cell) 818-559-8641 (fax)**  
**j.elliott@pucschools.org**

**EDUCATION:**

**2009** Ed.D. Educational Leadership and Change, Fielding Graduate University, Santa Barbara, CA  
**1997:** M.A. Educational Administration, California State University, Northridge, CA  
**1997:** Administrative Credential, California State University, Northridge, CA  
**1992:** Multiple Subjects Teaching Credential, California State University Northridge, CA  
**1973:** B.A. Anthropology, California State University, Northridge, CA

**PROFESSIONAL EXPERIENCE:**

**1999– present –Co-Founder and CEO, Partnerships to Uplift Communities (PUC)**  
A charter school development and management organization that has developed and currently operates 10 independent public charter schools in the NE San Fernando Valley and NE Los Angeles. Three more schools will be developed over the course of the next 2 years (2 of which will open in September 2010). The story of the founding of the first school, Community Charter Middle School, is featured in Dr. William Ouchi's book, *Making Schools Work*.

**2008 – present: Adjunct professor, Loyola Marymount University**  
Teaching in the Master's program in Educational Leadership with a charter school emphasis.

**1992 – 1998: Montague Charter Academy, Pacoima, CA**  
Classroom teacher, Title 1 Coordinator, Curriculum Advisor, teacher leader and co-author of the charter petition to convert Montague from an LAUSD school to an independent charter school.

**1986 – 1992: Pacoima Elementary School, Pacoima, CA**  
Classroom teacher for grades one through six. Authored a Healthy Start Planning Grant and coordinated the development of a Healthy Start program in collaboration with two other area elementary schools.

**1984 – 1986: Northeast Valley Health Corporation, San Fernando, CA**

Director of Health Education. Trained and directed health educators, teen and parent advocates. Coordinated health education outreach to public schools and health education classes on site. Taught family life and sex education to students in eleven area high schools.

**1974 – 1984: Family Planning Centers of Greater Los Angeles, Los Angeles, CA**

Started as a Health Care Assistant, Birth Control Counselor, Infertility Counselor, and Research Assistant. Then became Clinic & Health Education Director., Supervised staff of 25 employees, coordinated scheduling of clinic sessions and outreach.

**COMMUNITY AFFILIATIONS:**

**Advisory Board Member**– Youth Speak, Pacoima, CA.

**Board Member** – Multicultural Learning Center, Canoga Park, CA

**Board Member** - California Charter Schools Association 501C4 Board

**PROFESSIONAL CONTRIBUTIONS:**

**Charter School Leadership Training Modules**

Fielding Graduate University, Masters of Arts in Collaborative Educational Leadership (MA-CEL) Co-Authored leadership training modules for graduate students interested in developing charter schools

**Presentations at Charter School Conferences**

Presentations related to all aspects of charter school development and operations at the state and national conferences annually from 1999 - present

**Grant Author and recipient**

Author and recipient of numerous grants including but not limited to the following:

- The College Ready Promise. A 60 million dollar grant from the Bill and Melinda Gates Foundation developed and received in collaboration with 4 other California charter management organizations. 2009 – present
- Walton Charter School startup Grants. 2006, 2009
- Ahmanson Foundation Grant for development of performing arts space, 2008
- Federal charter schools planning and implementation grants *1998, 2000, 2002, 2003, 2005, 2006, 2009*. California State Department of Education
- Dell Foundation funding for buildup of PUC home office and opening of new schools, 2004 – present
- New Schools Venture Fund funding for building of PUC home office and opening of new schools, 2004 - present
- Bill & Melinda Gates Foundation Early College High School Grants, 2004

- Federal charter school grants: Startup and implementation grants for every PUC school
- MCI WorldCom technology grant 2000; In collaboration with CSUN Community Service Learning Department
- Healthy Start Grant, Pacoima Elementary School, 1992

### **PARTNERSHIP FACILITATION:**

**Service Learning Partnerships** (2000 – 2005); Collaborated with CSUN personnel to facilitate numerous service learning project partnerships for CSUN students and students in the NE San Fernando Valley PUC Schools,

**Co-presenter** (2000 - 2002); Campus Compact Forums; in collaboration with CSUN Office of Service Learning Director

**6<sup>th</sup> grade CSUN summer programs for PUC students** (1999 – present); Facilitated partnership with CSUN to design a college immersion program for all incoming 6<sup>th</sup> grade students in PUC schools in NE San Fernando Valley, who spend one week on the CSUN campus prior to the onset of their first middle school year.

**Early College High School Partnerships** (2003 – present); Facilitated partnerships with Los Angeles Mission College and CSUN in order to permit students from Community Charter Early College High School to take college classes concurrently with high school course work.

**Ref Rodriguez, Ed.D.**  
2904 Sagamore Way  
Los Angeles, California 90065  
818.303.6472  
ref.rodriguez@gmail.com

## **PROFESSIONAL EXPERIENCE**

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- 2009 to present      **President and CEO,  
Partners for Developing Futures, Inc., Los Angeles, CA**  
Responsible for leading a social venture investment fund that primarily invests in high-potential, early-stage minority-led charter schools and charter school networks that serve underserved students. Partners' mission is to efficiently identify, recruit, and support leaders of color in creating and growing high-quality charter schools and charter school networks. Primary responsibilities include managing the day to day operations of the organization, raising funds, growing the organization to scale, and measuring organizational effectiveness.
- 1999 to 2009      **Founder and Co-CEO,  
Partnerships to Uplift Communities (PUC), Inc., Los Angeles, CA**  
Responsible for the strategic and day to day operations of a nonprofit charter school management organization. During tenure, PUC operated ten charter school campuses, serving 3000 students, located in Northeast Los Angeles and the Northeast San Fernando Valley. Oversaw a senior management team comprised of seven senior managers responsible for operations, finance, human resources, fundraising & development, strategic planning and initiatives, clinical counseling, and curriculum & instruction. Direct oversight responsibility for the implementation of a 30 million dollar annual operating budget. Developed a revenue generating arm (PUC Services) that offers back office support services to charter schools and nonprofits in Los Angeles.
- In 1999 founded California Academy for Liberal Studies, the first charter school in Northeast Los Angeles. In 2003 California Academy for Liberal Studies, Inc. and Community Charter Middle School, Inc. merged to become Partnerships to Uplift Communities, Inc. (PUC).
- 2009 to present      **Lecturer, Institute of School Leadership and Administration  
School of Education, Loyola Marymount University, Los Angeles, CA**  
Teach courses in the School of Education Master's program in Leadership and Administration and the Doctoral program in Leadership for Social Justice.
- 2007 to 2008      **Executive in Residence, Charter School Leadership Academy  
School of Education, Loyola Marymount University, Los Angeles, CA**  
Responsible for developing and managing a program for aspiring leaders in charter schools leading to a Master's degree and/or an Administrative Services Credential.
- 1998 to 2000      **Parish Manager, St. Francis de Sales Parish  
Sherman Oaks, CA**  
Oversee the day to day business, finance, and administrative functions for a Catholic parish and Catholic parochial school serving 3000 registered families. Responsible for developing, managing, and overseeing a 2.5 million dollar operating budget.

- 1996 to 1998      **Director of Administration and Development, Divine Savior School, Los Angeles, California**  
Oversee administration, finance, fundraising, and operations for a Catholic parochial school serving 300 students in grades k-8.
- 1995 to 1996      **Analyst/Executive Assistant, Office of the Vice Chancellor for Business & Finance, California State University System, Long Beach, CA**  
Provide technical support regarding the implementation of fiscal and administrative policy to the business & finance departments for each of the 22 campuses in the California State University system.
- 1993 to 1995      **Executive Assistant to the Chairman & Chief Executive Officer, Henry Group of Companies, Huntington Park, CA**  
Serve as right hand to the Chairman and CEO of a privately held company specializing in manufacturing roof maintenance products and the distribution of premium wines.
- 1989 to 1993      **Accounting Manager, Eanda Corporation dba Erbe & Associates Los Angeles, CA**  
Oversee the accounting, finance and administrative functions for a privately held computer consulting firm.

## EDUCATION

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- 2006      Doctor of Education (Ed.D.), Educational Leadership & Change  
Fielding Graduate University, Santa Barbara, California  
Dissertation Title: *Evaluation of an Urban Charter Middle School Serving Predominantly Latino Students.*
- 1995      Bachelor of Arts in Humanities  
Loyola Marymount University, Los Angeles, California

## COMMUNITY SERVICE

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- Corporate Treasurer & Board Member (2003-present), Partnerships to Uplift Communities, Los Angeles, CA.
- Advisory Board Member (2010-present), Education Pioneers, Los Angeles, CA.
- Board Member (2007-present), Multicultural Learning Center (a Dual Language Charter School), Woodland Hills, CA.
- Founding Member (2003 – present). Education Strategy Group – Occidental College, Center for Community Based Learning, Los Angeles, CA.
- Vice Chair and Board Member (2005 – 2009), California Charter Schools Association. Los Angeles, CA.
- Board Member (2004 – 2007). Los Angeles Boys and Girls Club, Los Angeles, CA.
- Board Member (2004 – 2007). Small Schools Alliance, Los Angeles, CA.



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**CIVIC and PROFESSIONAL APPOINTMENTS**

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Commissioner, City of Los Angeles (2006 – 2007). Los Angeles Housing Department, Rent Adjustment Commission. Los Angeles, CA. Appointed by Mayor Antonio Villaraigosa.

Member, Advisory Council (2006 – present), School of Education, Loyola Marymount University, Charter School Leadership Training Academy.

Member, Steering Committee (2005). Aspen Institute / NewSchools, Annual Gathering of Education Entrepreneurs.

Elected Member (2007), Glassell Park Neighborhood Council (Public Office). City of Los Angeles.

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**FELLOWSHIPS**

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Fellow (2007 – 2009). Aspen Institute / New Schools Entrepreneurs for Public Education Program. Aspen, CO.

## JOHN D. BIROC, Ph.D.

FAX (818) 886-0628

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*Perhaps the most poignant example of group motivation I can recall was in working with a group of adult patients in a psychiatric hospital who, under the skilled direction of John Biroc, Professor of Theatre, CSUN, re-enacted what it was like to make a suicide attempt. I do not recommend that the casual reader attempt such an intervention, for it requires someone as mature and sensitive as Dr. John Biroc to handle this kind of work.*

Professor Gavin Bolton, *Towards a Theory of Drama in Education*, London, England

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### Degrees

Ph.D. (Counseling Psychology) University of Southern California  
Dissertation topic: "The effect of psychodramatic role-reversal on  
the reduction of adolescent egocentricity in a milieu therapy setting."  
Minor in Family Therapy, 1989

M.S. (Counseling Psychology) University of Southern California  
Los Angeles, CA, 1981

M.A. (Theatre) California State University,  
Northridge, CA, 1974

B.A. (Theatre) San Fernando Valley  
State College, Northridge, CA, 1969

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Licensed Marriage and Family Therapist  
State of California License No. M16752, February, 1981.

Private practice, Encino, CA, 1981 to present.

President, Board of Directors, PUC Schools, Burbank, 2008 to present. CMO runs 12 charter schools in San Fernando Valley and Los Angeles.

Clinical Coordinator, Van Nuys Psychiatric Hospital, Partial Hospitalization Program, April 1998 to 2001.

Clinical Director, Sirkin Institute, Encino, CA, 1985 to 1988.

Co-founder, Malibu Ranch Mind and Body Spa. Calamigos Ranch. In charge of mental health program/component, 1992.

Staff director, California Institute of Psychodrama, Santa Monica, CA, 1976-1979. Dr. Lewis Yablonsky, director.

Psychodramatist, Winterton Mental Hospital, Durham, England, working with adolescent groups. Invited by Dr. Gavin Bolton, Professor, University of Durham.

Lifetime teaching credential, State of California, Secondary Credential

Trained by Southern California Diabetes Association in Psychological and Sociological Implications of Diabetes, 1987.

Board of Directors, Free Arts for Abused Children. The organization brings arts to children who are victims of child abuse. Involved in teacher training and recruitment, video production, public relations, and was a member of the Executive Board. 1973 to present.

Board of Directors, Partnerships to Uplift Communities (PUC), Charter school movement, State of California. 2006.

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### Teaching Experience

Los Angeles Community College District: Pierce College, Woodland Hills, CA., Department of Psychology. *Adjunct Professor*, Undergraduate Program. 2000 to present

Antioch University, Los Angeles, Department of Psychology and Department of Sociology. 1993 to 2000. *Adjunct professor*. Both graduate and undergraduate programs.

UCLA, Graduate School of Social Welfare. 1989 to 1994. *Adjunct Professor*

California State University, Northridge, Department of Theatre, *Associate Professor*, 1971 to 1986. Taught acting, drama in education, drama therapy, and improvisational drama.

Sirkin Institute, Encino, CA. *Clinical director/faculty*, Paraprofessional Training Program. 1982 to 1988. Implemented training course for paraprofessionals and supervised interns.

Van Nuys High School, Los Angeles Unified School District, 1968-72. Taught drama, filmmaking, English, and history.

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### Additional Work Experience

Motivational speaker: *Paul Mitchell Systems*, Vail, CO; *Sebastian International*, Woodland Hills, CA; *ARCO*, Los Angeles, CA; *Cushman and Wakefield*, Los Angeles, CA; *NBC*, Burbank, CA.

Professional actor: Stage (both in New York and Los Angeles), television (including regular role on television series, Convoy), and commercials. (Separate resume on request)

Also appeared in the following television shows dealing with therapy:

Todd TV: Reality Show, FX Television, 2004. Guest therapist.

Alternatives, PBS (Psychodrama and corporal punishment)

Talk About, CBS (Psychodrama as a form of therapy)

Special Edition, Metromedia (Psychodrama, an intro.)

Two on the Town, CBS (Understanding cultural differences through psychodrama)

MidMorning LA, KTTV (Mediation and Divorce)

Considered for host of The Human Affair, ABC  
Considered for Host of The Group. Fox Television.

Professional baseball, Chicago Cubs, 1957

Drama editor/reviewer: San Fernando Valley *Sun*

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### Clinical Experience

Private Coaching/Therapy Practice, Encino, CA, 1981 to present

AVERT Project: *Reducing School Violence Through Empathy*: training for Santa Barbara School District. May, 2006.

AVERT Project: *Probation Safety*: training for San Luis Obispo Department of Probation, Leonard Manzella, director. April, 2007.

Administrator, *Boyle Heights Adult Day Health Care Center*, Los Angeles. Administrator of day care for chronically mentally ill and supervised healthcare professionals. October, 2000 to August, 2001.

Director, St. Luke Adult Day Health Care, Lakeview Terrace, CA March, 2000 to May 2000.

Clinical Director, Partial Hospitalization Program, *Van Nuys Psychiatric Hospital*, April, 1998 to February, 2000.

Women's Unit, Adolescents, Adult Unit [Chemical Dependency and Psychiatric].

Contract psychotherapist, *Pine Grove Mental Health Hospital*, February, 1989 to 1992. (Day Treatment with both adolescents and adults, Family Therapy).

Contract psychotherapist. *Coldwater Canyon Hospital*, April, 1988 to 1989 (Adolescents [Psych and CD], Adult Psychiatric).

Supervisor / administrator. *Sirkin Institute*, Encino, CA. Clinical director/faculty, Para-professional Training Program. 1982 to 1988.

Contract psychotherapist, *Woodview-Calabasas Hospital*, Adolescents, Young Adults and Adults, 1986-1987.

*Northridge Hospital*, Contract Therapist, Adolescent Day Treatment, 1984-85.

Contract psychotherapist, *Nu-Med Regional Hospital*, Recovery Unit (chemical dependency), Sept., 1986 - Feb., 1987. .

Guest lecturer and practitioner, *Winterton Mental Hospital*, Durham, England, Adolescents, Young Adults; 1977.

Staff director, *California Institute of Psychodrama*, Santa Monica, CA. Dr. Lewis Yablonsky, director. 1976-1979

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## Grants and Awards

Selected among top 10% of American University Professors.

Nominated for Distinguished Professor Award, CSUN, for seven consecutive years.

Selected for National Committee on Psychological and Social Issues of Diabetes, ADA.

Selected for *Who's Who in the West*, 1979 through 1993.

Acknowledged in Professor Gavin Bolton's book, *Towards a Theory of Drama in Education*, Longman Group, Ltd., London, 1979.

CSUN Foundation Grant for Instructional Improvement, December, 1979.

Selected for National Drama in Education Committee, American Theatre Association.

Article in Gordon Hunt's book, *How to Audition*, Basic Books, Chicago, 1978.

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## Publications

Featured in: Gerrie, Anthea, *Band-Aid*. London Sunday *Express* (reprinted in Boulder *Times*), September 18, 2002.

Mentioned in Rayner, Ben, *The heavy burden of being a mega-star*. Toronto *Star*, August 25, 2002.

Featured in: Boucher, Geoff, *Helping rock bands make themselves whole*, Los Angeles *Times*, Calendar Section, July 23, 2002, p.1.

Featured in: Boucher, Geoff, *Helping rock bands*, Baltimore *Sun*, August 7, 2002

Featured in: Boucher, Geoff, *Helping rock bands make themselves whole*, Orlando *Sentinel*, August 9, 2002

Featured in: "Incubus and Audiovent share..." The Point, St. Louis, MO Online Rock Alternative, August 10, 2002.

Featured in: Chagollan, Steve, *Hollywood Reporter*, "Pet Projects", June 7, 1993.

Mentioned in: Bolton, Gavin, *Towards a Theory of Drama in Education*, Longman Group, Ltd. London, 1979.

Biroc, John in Gordon Hunt, "Overcoming the fear of auditioning," *How to Audition*, Basic Books, Chicago, 1978.

Quoted in Los Angeles *Times* on numerous occasions.

Mentioned in Terrance Hines, *An Actor Succeeds: Career Management for the Actor*, Samuel French, 1990.

Biroc, John, "Creative Drama and the Adolescent," *Children's Theatre Review*, Spring, 1973. pp. 14-17.

Biroc, John, "Captain Creative Drama: a melodrama in 1/2 act," *Secondary School Drama Journal*, Winter, 1975. pp. 8-10.

Biroc, John, "Early Creativity: its birth and death," *The Child*, Vol. 1, No. 1. pp. 18-20. (co-authored with Cornelia Hansen).

Biroc, John, "The Arts: Drama," *Guide to the Performing and Visual Arts*, Performing Tree of Los Angeles. 1976.

Biroc, John, "The Arts in the Curriculum," (co-authored with Susan Cambique and Millie Burnett) *Guide to the Performing and Visual Arts*, Performing Tree of Los Angeles, 1976.

Biroc, John, "Approaching the Ibo Tribe of Nigeria Through Creative Drama," Performing Tree supplement to *Guide to the Performing and Visual Arts*, Los Angeles, CA, 1976.

Biroc, John, "Multi-Cultural Education and Drama," Performing Tree supplement to *Guide to the Performing and Visual Arts*, Los Angeles, 1976.

Contributed to "Drama in Education," *Theatre News*, Summer, 1977.

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### Professional Affiliations

- \* American Society for Group Psychotherapy and Psychodrama
- \* California Association of Marriage and Family Therapists
- \* National Association for Drama Therapy

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### Professional Papers/Guest Performances/Guest Speaking

*The Face of Evil*: Working with gang members. Discovery Channel with Dr. Lewis Yablonsky, December, 2007

Todd-TV, FX Network. Special appearances, February 18, 25, March 3, 2004.

Canadian Television News: Cowan, Matt, *Rock star coach provides stress-free philosophy*. Canadian Television, October 2, 2002

MTV; *Self destruction and rock music*. Ultrasound. Appeared with group *Audiovent*, October 7, 2002.



Interview: “The Development of Bands,” South Carolina Educational Radio Network, August 3, 2002.

Interview: “Working With Rock n’ Roll,” SXWX Radio, Dallas, TX, August 2, 2002.

Interview: Allan Ayo, “The Rock Alternative Radio Station,” San Jose, CA, August 8, 2002.

“Anger Management” Pierce College, Woodland Hills, CA. Workshop sponsored by Pierce College Counseling Center. May 8, 2001.

“Art Therapy and Drama” Art Center of Los Angeles, Pasadena, October, 1994

“Art Therapy and Its Cousins,” Asilomar Conference for National Association of Art Therapy, Pacific Grove, CA; June 5, 1994.

“Theatre, Sociodrama, and Psychodrama: Role and its relationship to abused children.” Free Arts for Abused Children Volunteer Training, Santa Monica, CA; July 15, 1993.

“Psychodrama and Sociodrama in Theatre, Film, Literature.” American Society for Group Psychotherapy and Psychodrama Conference, Santa Monica, July, 1993.

Stress Management in Everyday Life, Malibu Ranch Spa, July, 1992.

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### Travel and Travel-related experiences

Advisor to Break-Away Tours, San Diego, CA, 1971 to 2007. Set up and guided theatre tours to New York, London, Edinburgh, Paris.

Italy’s Cookin’ – set up and guided culinary tours to Umbria and Tuscany with Epicurean School of Culinary Arts, LA and Sbicca Restaurant, Del Mar, CA. 2000..

Toured throughout Europe and the United States.



**Ed A. Palmer**  
Senior Vice President  
Industrial Services Group

## CAREER SUMMARY

Ed Palmer has been associated with the Grubb & Ellis Company since 1978, where he primarily has been involved in the sale and leasing of major industrial/commercial type properties throughout the Central Los Angeles and East San Fernando Valley. As a member of the industrial staff in the Downtown Los Angeles office, he has consistently ranked as one of the top ten sales and leasing leaders in terms of commission earned. Mr. Palmer is a long-standing member of the American Industrial Real Estate Association and the Los Angeles Board of Realtors.

## EXPERIENCE

1978 – Present: Grubb & Ellis Company

## EDUCATION

Ed Palmer attended Arizona State University where he was a member of the Varsity Basketball team and served as a page at the Arizona State House of Representatives.

## CORPORATE REPRESENTATIONS:

- Meruelo Maddux Properties
- Lowe Development
- Disney
- CW Capital
- TCW Realty Advisors
- Dunn Properties Company
- City of Los Angeles
- Lawry's
- Less Sammis Corporation
- Forest Lawn
- Hydrill Company
- Tension Envelope Corporation
- Prudential Insurance Company
- Hunsaker Development
- LAPD
- Davis Development
- Carden Sprinkler Company
- Hexcel Corporation
- Amax Corporation
- Home Depot

# Professional Profile (continued)



ED A. PALMER (CONTINUED)

## REFERENCES:

HOUK DEVELOPMENT  
940 S. Figueroa Street  
Los Angeles, CA 90015  
David Houk, President  
213.624.8088

CARDEN SPRINKLERS  
2909 Fletcher Drive  
Los Angeles, CA 900653  
Mike Carden, President  
323.258.8300

PENN LITHO  
16221 Arthur Street  
Cerritos, CA 90703  
Charles Stay, CEO  
562.926.0455

LAWYERS TITLE COMPANY  
7530 North Glenoaks Boulevard  
Burbank, CA 91504  
David Cronenbold, President/CEO  
818.767.2000

MERUELO MADDUX PROPERTIES  
761 Terminal Street  
Building 1, 2<sup>nd</sup> Floor  
Los Angeles, CA 90021  
John Woods, Director of Leasing & Acquisition  
213.627.5045

## Jeanne Ponticello Adams

Fax: (805) 482-1885  
e-mail: jeanne.adams@csun.edu

### EDUCATION AND PROFESSIONAL PREPARATION:

1961	Ventura College	Ventura, Ca.	AA, English
1966	San Fernando Valley State College	Northridge, Ca.	BA, Education/English
1974	California State University	Northridge, Ca.	MA, Educational Administration/Supervision
1985	University of California	Santa Barbara, Ca.	MA, Policy and Organization Studies
1987	University of California	Santa Barbara, Ca.	Ph.D., Policy and Organization Studies

### CALIFORNIA CREDENTIALS

1966 General Elementary (Life)  
1972 Standard Teaching (Life)  
1973 Community College (Life)  
1974 Administration/Supervision (Life)

### HONORS:

2003 *Golden Oak Service Award*, in recognition of outstanding service to children and youth, California Congress of Parents, Teachers and Students  
2002 *California Professor of the Year*, Association of California School Administrators  
2002 *Administrator of the Year*, Region XIII, Tri-Counties Association of California. School Administrators  
2001 *Administrative Excellence Award*, Association of California School Administrators, Southern Ventura County  
1995 *Distinguished Woman of the Year*, Soroptomist International, Ventura County  
1994 *Celebrate Literacy Award*, International/California Reading Association  
1993 *Educator of the Year*, Phi Delta Kappa  
1992 *Migrant Education Award* for Service to Migrant Students and Families  
1992 *Lifetime Achievement Award*, California State Parent/Teacher Association  
1985 *Administrative Excellence Award*, Association of California School Administrators  
1984 Elected to *Phi Delta Kappa*, Education Honor Society  
1980 *Honorary Service Award*, Kamala School Parent/Teacher Association  
1978 *Outstanding Administrator of the Year*, Association of California School Administrators

- 1975 *Oxnard Woman of the Year*, Business and Professional Women's Club, Oxnard  
 1973 Elected to *Delta Kappa Gamma*, Education Honor Society

## **PROFESSIONAL EXPERIENCE:**

- |              |                                 |  |
|--------------|---------------------------------|--|
| 1998-99      | <i>Interim Department Chair</i> |  |
| 1996-Present | <i>Associate Professor</i>      | Department of Educational Leadership 1994-96 |
|              | <i>Lecturer</i>                 | and Policy Studies                           |
| 1988-94      | <i>Adjunct Faculty</i>          | California State University, Northridge      |

Performed all the duties of department chairperson. Have taught/teach fourteen of the graduate courses offered in the MA and Preliminary and Professional Administrative Services Credential programs, including two in Tokyo, Japan; serve as advisor to students; conduct Comprehensive Examination Study seminars, administer/ read Comprehensive Examinations; participate in revisions of credential program; supervise Induction, Practicum, Assessment, fieldwork and independent study students; service as Department representative to the School of Education Curriculum, Computer, Research and Sponsored Projects, DELTA Steering, CSUN @ CSUCI Faculty Advisory Committees; University Assessment Committee; coordinate, implement on-going update of annual In-Basket simulation course; serve as University liaison/Board member to Community Charter School; member, CHIME Charter School Steering Committee; chair, CHIME Charter School Administration Committee; member, Special Education Administrators Professional Development committee; chair development, implementation of student recruitment; served as Faculty Senator; participate, lecture in partnership programs with Chinese universities; conduct research in areas of leadership and policy.

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|-----------|---------------------------|---|
| 1995-2000 | <i>Associate Director</i> | Center for Partnerships for Educational Reform<br>California State University, Northridge |
|-----------|---------------------------|---|

Initiated, coordinated, monitored outreach activities with schools to establish partnerships based on linking leadership, service, support, and the expert and research resources of the University to schools and districts undertaking reform efforts focused on improved educational experiences and outcomes for all students. Partnerships have been forged with approximately three dozen schools, districts, and clusters in three counties.

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|-----------|------------------|--|
| 1992-1995 | <i>President</i> | Adams Group, Education and Management<br>Consultants |
|-----------|------------------|--|

Consultant services contracted included addressing organizational leadership, processes, and audits (including organization behavior, development, surveys, and long-range planning); design and delivery of training programs and special events; retreat, leadership conference, and other group facilitation; grant research and proposal preparation; curriculum design, instructional strategies and assessment. Clients included Boards of Trustees, school districts, county offices, educator, private sector, and civic organizations. The Adams Group oversaw the consultant services of approximately 25 professionals who were referred, assigned and supported as specific requests were



received. Adams Group services have been suspended to avoid compromise or conflict with role of The Center for Partnerships for Educational Reform.

1992-1995      *Consultant*      Ventura County Superintendent of Schools  
Offices

Development of grant proposals, curriculum/instruction activities, and professional development programs; organization and leadership of Ventura County literacy efforts, including convening of first Ventura County Literacy Summit and chairing newly-created Ventura County Literacy Council incorporating representation of all County literacy service-provider organizations, agencies, and corporate/business interests. Personal consultant services suspended to avoid compromise or conflict with role of The Center for Partnerships for Educational Reform.

1982-1994      *Administrator of the Department*      Oxnard School District  
*of Curriculum and Instructional Services;*  
*Administrator of Proposals and Grant Writing*

**Programs Administered/Designed/Developed** (partial list)

Administration and supervision of a number and variety of district programs, including, but not limited to, the following:

Educational Media and Technology Center	Central Book Depository
Gifted and Talented Education	Instructional Television Studio
Bilingual Education and Title VII Programs	and Consortium
Mentor Teacher Program	Adopt-a-School Partnerships
Instrumental/Vocal Music	Title IX Compliance
Educational Learning Magnet Center	Professional Certification
Student Proficiency Assessment System	Primary Prevention Education
Miller-Unruh Reading Specialists	School Photographer Selection
Intercession/Summer Session, Saturday School	Eisenhower Math/Science Program
Staff Development Center and Comprehensive	Grant Proposal Development,
Staff Development Program	Implementation and Evaluation

And all associated budgets (exceeding \$3,000,000) for a Year Round Education district, 12,600 ADA.

**Supervision**

Administration, coordination, direction of District's K-8 instructional program; program personnel selection, staff development/in-service activities, all curriculum development/revision, articulation within district/ with high school district, needs assessment and evaluation, textbook/instructional materials selection and adoption, Curriculum Council, ad hoc and permanent task forces comprised of staff and community members, regular contacts with media and community agencies regarding district programs and activities. Direct supervision of 31 department employees.

1981-1982      *Principal*      Haydock Junior High School Oxnard School District

Administration and leadership of instructional program and management of plant for student body of 975 seventh and eighth graders included supervision, training and evaluation of 45 teachers, 3 Learning Directors, and 14 classified employees.

Programs introduced and/or created included Clinical Instruction/Supervision; computerization of student data; Gifted and Talented Education (GATE); extensive program of



after-school activities; ESL and literature strands; Proficiency Development Labs; parent education; thematic/interdisciplinary instruction; a plan for regular student recognition; and staff participation in shared decision-making.

1975-1981     *Principal*     Kamala School

Oxnard School District

Responsibilities included not only administration and leadership of instructional program for 785 K-6 pupils of multi-ethnic and diverse socio-economic backgrounds; selection, supervision, training and evaluation of 44 certificated and classified personnel; management of a \$2,500,000 plant and capital outlay, instructional, Title IV and Bilingual Program budgets, but additionally required development of systems for assuring ethnic balance, coordination of free/reduced price lunch program, Lau-Nichols Master Plan, Migrant Program, and Special Education.

Programs originated and sustained in the six years at Kamala School included task forces to encourage staff/community participation in decision making and budget recommendation; Sustained Silent Reading; extensive incorporation of community including senior citizens, Navy Community Tutors and Kamala families as school resources; processes to foster increased school/home communication; in-house development of management systems and programs to augment reading, language and math progress; an innovative discipline plan to acknowledge responsible behavior and discourage inappropriate behavior; regular parent education offerings, lending library and nursery; and establishment of on-going, individualized staff development program designed to improve each teacher's instructional skills and to promote professional growth. Organizational tasks included restructuring of school from K-3 to K-6 organization and maintenance of program and school mission in wake of two catastrophic plant fires.

1973-1975     *Instructional Specialist/*

Oxnard School District

*Program Coordinator (Early Childhood Education, Title I)*

Developed one of the first and most replicated school level plans in California; provided coordination, assistance and leadership in all areas of the instructional program; directed seven-member supportive services team; designed innovative "time banking" schedule which allowed for full day, weekly, inservice programs for staff and volunteers; coordinated all federal and state programs with specific reference to evaluation, budget, staffing and objectives.

1972-1973     *Resource Specialist*     Marina West School     Oxnard School District  
*(Emergency School Assistance Act)*

Served as assistant to the principal and resource to the staff; developed and supervised multicultural activities; acted as liaison to the school advisory council; directed inservice and community participation components as well as all parent/volunteer activities, with specific attention to goals of the District's federally mandated racial integration effort.

1970-1972     *Instructional Specialist*  
*(ESEA, Title I)*

Oxnard School District

Coordinated budget, extensive university-sponsored staff development program, objectives, advisory committees, professional support team, and school level plan development for five-school federal demonstration project after court mandated reorganization and redistribution of students and funds as part of racial integration effort.

1969-1970     *Mathematics Specialist*     Juanita Demonstration School  
Oxnard School District

Coordination (inservice training, demonstrations, selection of materials, budget, interpretation, and evaluation) of mathematics program.

1962-1969     *Teacher, Grades Pre-1st - 8*

Pleasant Valley; United States Marine Corps Dependents' Schools, Camp LeJeune, North Carolina; Oceanside; Rio, Ventura, and Oxnard School Districts, regular and summer sessions

1970-1994     *Adjunct Instructor of Extension, Satellite, and On-Campus Courses*

1970-1976     University of California, Santa Barbara  
1971-1974     United States International University, San Diego  
1973-1975     Ventura College, Ventura  
1974-1984     California Lutheran University (guest lecturer)  
1988-1994     California State University, Northridge

1969-Present     *Consultancies, Workshops, Presentations*

Have delivered inservice workshops, lectures and consultant services in several states and countries for districts, agencies, professional organizations, county offices, the California School Leadership Academy and the Department of Education in the following areas:

Reorganization/Restructuring	Middle School Reform
Shared Decision Making	Mathematics
School Level Plan Development	Teaching Strategies
Individualized Instruction	Parent Education
Critical Thinking Strategies	Classroom Management
Effective Schools Research	Professional Development
Training of Paraprofessionals	Authentic Assessment
Community Involvement	Textbook Selection/Adoption
Year Round Education	Public Relations
Change Models/Processes	Visual and Performing Arts
Leadership	Strategic Planning
Grant Writing	Literacy
Effective Meetings	Mentor Programs
University/K-12 Partnerships	Preservice/Inservice Needs of Principals

**Representative presentations include the following:**

Numerous presentations to professional and civic groups regarding the establishment, governance, and programs of *University Preparation School at CSU Channel Islands*, as the school's Founder/Developer, 1999-Present

Invited Presenter: "*Strategies for Promoting Productive Meetings.*" *Breaking Barriers: Pathways to Human Resources Success*, California State Polytechnic University, Pomona, February 23-25, 2001, three workshops.

"*Ideal Schools for the 21st Century.*" PDK International Conference on Effective Schools, Houston, with Professor J. Su, October 29, 1999.

*"California School Administrators Delegation to the People's Republic of China."* A series of panel presentations at universities in Beijing, X'ian, Guilin, China, regarding comparative issues of administrator and teacher preparation, September 24-October 4, 1999.

*"Unity Through Diversity and Collaboration,"* Introduction of keynoter, facilitator/chair of two workshops, Association of California School Administrators, Santa Barbara, May 7, 1999.

*"Educational Leaders for the 21st Century: A Comparative Study of Chinese and American School Principals."* Annual Conference of the Comparative and International Education Society, University of Toronto, with Professor J. Su, Canada, April 18, 1999.

*Personnel Administrators Academy;* design, presentation of seven months of weekend workshops per year for California school administrators, 1997-98, 1998-99.

*"Educational Administration and Leadership."* Three-hour presentation to group of thirty visiting Chinese scholars/administrators sponsored by World Bank and the China Institute, April 12, 1999.

*"What's Worth Fighting for Out There and Change Forces – the Sequel."* As co-founder of the *Partnership for Educational Leadership*, a university/K-12 partnership, introduced keynoter, Michael Fullan, Dean, Ontario Institute for Studies in Education, University of Toronto, and served as discussion facilitator, Camarillo, March 16, 1999.

*"Whetstones and Touchstones in the Preparation of Urban School Administrators."* Annual conference of the Council of Great City Schools, San Francisco, October 16, 1998.

*"Training of Educational Leaders for the 21st Century: A Comparative Study."* With Professor J. Su. *"Training of School Administrators in the US: Current Conditions and Reform Directions"*. World Congress on Comparative and International Education, University of Capetown, South Africa, July 15, 1998.

*"Forging Powerful Partnerships for the Future: University and K-12 Links"*, and introduction of opening plenary session keynote speaker, annual conference of Association of California School Administrators, April 17, 1998.

*"Curriculum, Instruction, and Education Policy in the United States."* Series of panel presentations made to university and public school educators and government officials in Beijing, Huangzhou, Suzhou, and Shanghai, China, as member of a delegation of six invited professors from across the United States. October 20-30, 1997.

*"School/University Partnerships: Models and Potential for Powerful Collaboration"*. With C. Weis, P. Kligman. Annual conference of Association of California School Administrators, San Francisco, October 24, 1996.

*"Punching Up for More Powerful, Productive Meetings,"* workshop, Association of California School Administrators Spring Conference, Santa Barbara, May, 1995.

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*"Tips for Writing Successful Grant Proposals,"* presentation at Healthy Start Conference sponsored by Ventura County Healthy Start Collaborative, July, 1995.



*"Tapping Community Resources to Promote Literacy"*, keynote address for annual meeting, Delta Kappa Gamma, Ventura, January 1995.

*Curriculum and Instruction Leaders Academy*; design and coordination of seven months of weekend workshops for 35 California school administrators, 1994-95

*"Adding Power, Punch, and Productivity for More Effective Meetings,"* Ventura County Principals' Institute Conference, Camarillo, August, 1994.

*"Preparing Winning Grant Proposals for School Sites"*, Moorpark Unified School District workshop for staff and advisory committee members; October, 1993

*"Professional Development: Theory and Practice"*, Two-day module presented to administrators from four counties under auspices of the Central Coast School Leadership Center, California School Leadership Academy, March/April, 1993.

*"Instructional and Student Performance Implications of YRE Programs"*. With N. Brekke, ACSA Annual State Conference, San Diego Convention Center, April, 1993.

*"Women in School Administration"*, keynote presentation for Association of University Women, Ventura County, January, 1993.

*"Innovative Approaches for Curricular Integration of the Visual and Performing Arts,"* California Department of Education Framework Conference, Asilomar Conference Grounds, Monterey, February, 1992.

*"Caught in the Middle: Embracing Middle School Reform"*; California PTA Council, Sacramento, March, 1992.

*"The School Administrator's Role in Augmenting On-Site Language Arts Programs,"* Ventura County Reading Association Annual Conference, Thousand Oaks, April, 1992.

*"The Parent/School Partnership: What Parents Can Do to Promote Student Learning,"* keynote for conference of GATE (Gifted and Talented Education) parents, Mandalay Resort, Oxnard, September, 1992

*"It's Elementary! Interpreting and Implementing the Recommendations of the Newest California Reform Document"*; Tri-County GATE Administrators, San Luis Obispo, October, 1992

*"Maximizing Mentorships"*; workshop, Annual Conference, California Association for Supervision and Curriculum Development, November, 1992; Irvine, California

### **SPECIALIZED TRAINING:** (partial list)

2003

Cognitive Coaching, California State Leadership Academy

- 1993-1994     Assessor training in administration and interpretation of teacher effectiveness instrument, PRAXIS, by Educational Testing Services
- 1984-1985     Graduate of the *Academy for the Superintendency*, seven month program sponsored by California Association of School Administrators
- 1980            *Literature of the Pacific and Readers Theater for the Classroom* practicum (University of Hawaii, Honolulu)
- 1976-1982     *Clinical Supervision*(UCLA, with Dr. Madeline Hunter)
- 1971            *Building and Applying Strategies for Initial Cognitive Skills (BASICS)*, University of Chicago
- 1971-72        *Hilda Taba Teaching Strategies for Critical Thinking* (University of Colorado, Boulder; University of Texas, El Paso)

## **PUBLICATIONS:**

"*Ideal Schools for the 21<sup>st</sup> Century: A Comparative Analysis of American and Chinese Principals' Views and Vision*", with Z.Su and E. Mininberg, Journal of School Leadership, March 2003, pp. 199-218

"*Profiles and Preparation of Urban School Principals: A Comparative Study in the United States and China*", with Z.Su and E. Mininberg, Education and Urban Society, Corwin Press, August 2000, pp.455-480.

"*Good Principals, Good Schools*", Leadership, Sacramento, September/October 1999, pp. 8-11.

"*Wake Up Your Meetings*", Executive Educator, Alexandria, VA, April, 1996, pp.19-23

"*Maximizing a Rich Professional Development Resource: The California Mentor Teacher Program*", California Schools, journal of the California School Boards Association, West Sacramento, California, 1998.

"*Responding Democratically to Special Interest Groups, A Guide to Resources That Examine the Issues of Public Pressure and Opposition Groups*," co-author; publication of the Association of California School Administrators, June, 1995.

"*Authentic Assessment*," co-editor and compiler of an annotated bibliography of authentic assessment resources and references; nationally marketed publication, Association of California School Administrators, May, 1995.

"*A Practical Guide for Instructional Leaders*," co-author; nationally marketed publication, Association of California School Administrators, August, 1994.

"*Enhancing Self-Esteem: A Guide for School Administrators*", co-author; nationally marketed publication, Association of California School Administrators, April, 1993.

*"Capacity Building, Teacher Empowerment and Accountability: The Name of the Game for Staff Development That Sticks," Thrust for Educational Leadership, February/March, 1990, pp.13-15.*

*Superintendents and Effective Schools* (Doctoral dissertation, 1987), pending publication, Technomic Press, under the title, Superintendents and Transformational Leadership.

*"'Education' Still An Integral Part of PE," Special Curriculum Issue, EdCal, April, 1985.*

Since 1969, have authored, co-authored, and edited a wide variety and number of handbooks, guides, and documents distributed under the auspices of the California Department of Education, the Oxnard School District, the Ventura County Superintendent of Schools Office, the California Association for Supervision and Curriculum Development, the Association of California School Administrators, and the California Association of Professors of Educational Administration.

## **RESEARCH**

*"Getting Water to the School: Obstacles to Principal Recruitment and Retention"*

This study was launched in April 1999, with a survey of all Educational Leadership and Policy Studies students who had completed requirements for the California Preliminary Administrative Services Credential over the past five years. It was initiated to gather data for analysis regarding the diminishing pool of qualified applicants for administrative positions in California and, most specifically, in the CSUN service area. The survey also sought feedback regarding graduates' degree of job satisfaction, as well as their assessment of the quality and appropriateness of preparation and support they'd received in CSUN's Department of Educational Leadership and Policy Studies programs. Additionally, this comprehensive survey solicited graduates' interest in and need for post-program training and institutes which the Department of Educational Leadership and Policy Studies might offer them.

Preliminary research findings were reported in an article, *"Good Principals, Good Schools,"* referenced above under *Publications*. The article generated a number of inquiries from superintendents, the California School Boards Association, the Association of California School Administrators, newspapers, journals, and other university educational administration faculty members regarding the findings. To date, four other universities have requested copies of the survey and permission to use it for the purpose of replicating the study in their service areas. The study has been cited in a number of research and other professional journals.

### ***National Validation Study of Read 180***

Submission of a proposal for this project was requested by the Executive Vice President, Scholastic Publications, Inc., for a two-year field study of a newly developed reading intervention program for low performing fourth through eighth graders. As proposal author and principal investigator, I assembled a five-member, cross-departmental research team of CSUN College of Education faculty to undertake this effort in six large urban school districts across the United States, in partnership with Scholastic Publications, Inc. and The Council of Great City Schools. The full research design was adopted; the project contract awarded to Columbia University.

*A Comparative Study of the Education of Educational Administrators in the U.S. and China*



Dr. Justine Su is the principal investigator for this study on which we have collaborated for the past five years. Results have been compiled and analyzed for surveys and interviews with populations of approximately 100 each, Chinese and American educational administrators. Data collected includes that regarding the comparison of preservice and inservice experiences of the study's subjects and their projections for what constitutes ideal schools for the 21<sup>st</sup> century. To date, we have made presentations regarding our findings at the University of Capetown, South Africa; Ontario Institute for Studies in Education, University of Toronto, Canada; and at the PDK International Conference on Effective Schools, Houston. This research and data collection have been expanded to include Australian administrators in collaboration with Australian universities.

## **OTHER SCHOLARLY CONTRIBUTIONS TO THE FIELD**

Service as Chair, California State University, Channel Islands Professional Development School Steering Committee. Assistance with establishment of CSUCI/Oxnard Union High School District Institute for International Studies, and with other activities related to teacher education programs, including participation in the K-16 Collaborative.

Three year service as member of the California Task Force for Development of the *California Professional Standards for Educational Leaders*, approved and adopted in 2003 by the California Commission on Teacher Credentialing.

Research, design, evaluation, and dissemination of a wide variety of innovative projects/programs regarding needs assessment processes, organizational development, curriculum alignment, magnet schools, mentor programs, comprehensive professional development, California instructional materials adoption procedures, and differentiated curriculum.

## **COMMUNITY AFFILIATIONS:**

**Member**, American Association of University Women  
**Executive Board Member**, Camarillo Arts Council  
**Member**, Friends of the Library, Camarillo  
**Charter Member and Founder**, Oxnard Historical Society  
**Charter Member**, Carnegie Arts Museum Foundation  
**Charter Member**, Gull Wings Children's Museum  
**Steering Committee Member**, Ventura County Maritime Museum Education Committee  
**Steering Committee Member**, Oxnard Multicultural Festival Committee  
**Education Committee Member**, Ventura County Economic Development Association  
**Mayoral Appointee**, Camarillo City Council Liaison Committee, CSUCI

## **PROFESSIONAL AFFILIATIONS:**

American Association of School Administrators  
American Educational Research Association  
American Society for Training and Development  
California Association of Professors of Educational Administration, **Co-Chair**,  
**Joint Action Committee; Member of the Executive Committee**  
Association of California School Administrators

- \*1995-1998: **Chair**, State Higher Education/Professional Preparation Committee
- \*1990- Present **Member**, State Curriculum, Instruction, and Evaluation Committee
- \*1995-1998: **Liaison**, State Superintendency Committee
- \*1993-Present: **Liaison**, State Legislative Policy Committee
- \*1988-1989: **Member**, State Annual Conference Planning Committee
- Member**, State Nominations Committee
- Chair**, Tri-County Political Action Committee
- \*1987-88: **President**, Region XIII (Ventura, Santa Barbara, San Luis Obispo Counties)
- \*1986-1989: **Delegate**, State Representative Assembly
- \*1984-1985 **Vice President**, Programs, Region XIII
- \*1982-1983 **President**, Ventura County Charter Group

Association for Supervision and Curriculum Development; **Member and**

#### **Workshop Presenter**

International, California, and Ventura County Reading Associations; **Member and Workshop Presenter; Executive Board Member, VCRA**

Association of Mexican American Educators

**Executive Board Member**, Graduate School of Education Alumni

Association, University of California, Santa Barbara

California Mathematics Council, **Member and Workshop Presenter**

National and California Staff Development Councils

Phi Delta Kappa, **Member and Presenter**

**Policy Advisory Board Member**, Comprehensive Teacher Education

Institute, School of Education, California State University, Northridge

**Advisory Board Member**, Center for Educational Change in Math and Science,

University of California, Santa Barbara

**Charter Member**, California Department of Education *It's Elementary!*

Alliance

**Chairperson**, Ventura County Literacy Council and Ventura County Literacy

Summit

**Co-Founder, Steering Committee Member**, Ventura County Principals'

Institute

**Board Member**, Education Advisory Board to California Assemblyman Nao

Takasugi

**Advisory Board Member**, Project T.I.M.E. (Teachers Improving Math Education), California Math Project

**Principal Author and Advisory Board Member**, Santa Barbara/Ventura Counties Beginning Teacher Support and Assessment Project

**Appointed Member**, State Task Force for Development of Professional Standards for School Leaders

**Board Member**, California School Leadership Academy

**Founder/Developer**, University Preparation School at CSU Channel Islands;

**Member**, Corporate Board of Directors; **Member**, Executive Committee

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**AUDITED CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2009**

**PARTNERSHIPS TO UPLIFT COMMUNITIES LOS ANGELES**  
**(A California Non-Profit Public Benefit Corporation)**

**PARTNERSHIPS TO UPLIFT COMMUNITIES VALLEY**  
**(A California Non-Profit Public Benefit Corporation)**

**PARTNERSHIPS TO UPLIFT COMMUNITIES LAKEVIEW TERRACE**  
**(A California Non-Profit Public Benefit Corporation)**

**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**CALS EARLY COLLEGE HIGH SCHOOL**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**EXCEL CHARTER ACADEMY**  
**LAKEVIEW CHARTER ACADEMY**  
**MILAGRO CHARTER SCHOOL**  
**TRIUMPH CHARTER ACADEMY**

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**AUDITED CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2009**

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**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**AUDITED CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2009**

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## INDEPENDENT AUDITORS' REPORT

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the accompanying consolidated statement of financial position of Partnerships to Uplift Communities (PUC) (a nonprofit organization) as of June 30, 2009 and the related consolidated statements of activities and cash flows for the year then ended. These consolidated financial statements are the responsibility of PUC's management. Our responsibility is to express an opinion on these consolidated financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of PUC as of June 30, 2009, and the changes in its net assets and cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

In accordance with *Government Auditing Standards*, we have also issued our report dated December 11, 2009 on our consideration of PUC's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* and should be considered in assessing the results of our audit.



Board of Directors  
Partnerships to Uplift Communities

Our audit was conducted for the purpose of forming an opinion on the basic consolidated financial statements taken as a whole. The accompanying schedule of expenditures of federal awards on page 18 is presented for purposes of additional analysis as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. The supplementary information on pages 15-17 and 19-42 is presented for purposes of additional analysis and is not a required part of the basic consolidated financial statements. The supplementary information has been subjected to the auditing procedures applied in the audit of the basic consolidated financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic consolidated financial statements taken as a whole.



VICENTI, LLOYD & STUTZMAN LLP

December 11, 2009

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## CONSOLIDATED STATEMENT OF FINANCIAL POSITION June 30, 2009

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Eliminations	Total
<b><u>ASSETS</u></b>					
<b>CURRENT ASSETS:</b>					
Cash and cash equivalents	\$ 1,952,403	\$ 674,327	\$ 1,840,440	\$ -	\$ 4,467,170
Accounts receivable	2,431,165	460,381	2,504,089	-	5,395,635
Intercompany receivable	-	-	582,582	(582,582)	-
Deposits and prepaid expenses	192,470	60,434	269,622	-	522,526
Other current assets	5,284	304	15,465	-	21,053
Total current assets	<u>4,581,322</u>	<u>1,195,446</u>	<u>5,212,198</u>	<u>(582,582)</u>	<u>10,406,384</u>
<b>LONG-TERM ASSETS:</b>					
Work in progress	1,085,351	-	-	-	1,085,351
Leasehold improvements	806,202	198,129	1,066,844	-	2,071,175
Furniture and equipment	573,871	80,648	481,372	-	1,135,891
Less: Accumulated depreciation	<u>(947,527)</u>	<u>(86,010)</u>	<u>(437,839)</u>	<u>-</u>	<u>(1,471,376)</u>
Total long-term assets	<u>1,517,897</u>	<u>192,767</u>	<u>1,110,377</u>	<u>-</u>	<u>2,821,041</u>
Total assets	<u>\$ 6,099,219</u>	<u>\$ 1,388,213</u>	<u>\$ 6,322,575</u>	<u>\$ (582,582)</u>	<u>\$ 13,227,425</u>
<b><u>LIABILITIES AND NET ASSETS</u></b>					
<b>CURRENT LIABILITIES:</b>					
Cash overdraft	\$ 294,697	\$ -	\$ 2,467,589	\$ -	\$ 2,762,286
Accounts payable	1,107,523	27,391	420,916	-	1,555,830
Accrued payroll and related expenses	511,984	79,602	484,539	-	1,076,125
Other accrued liabilities	-	-	66,491	-	66,491
Intercompany payable	250,000	-	332,582	(582,582)	-
Current portion of leases payable	4,161	-	792	-	4,953
Current portion of loans payable	<u>173,288</u>	<u>50,000</u>	<u>94,000</u>	<u>-</u>	<u>317,288</u>
Total current liabilities	<u>2,341,653</u>	<u>156,993</u>	<u>3,866,909</u>	<u>(582,582)</u>	<u>5,782,973</u>
<b>LONG-TERM LIABILITIES:</b>					
Long-term portion of leases payable	1,901	-	-	-	1,901
Long-term portion of loans payable	-	200,000	-	-	200,000
Security deposits payable	<u>-</u>	<u>-</u>	<u>6,500</u>	<u>-</u>	<u>6,500</u>
Total long-term liabilities	<u>1,901</u>	<u>200,000</u>	<u>6,500</u>	<u>-</u>	<u>208,401</u>
Total liabilities	<u>2,343,554</u>	<u>356,993</u>	<u>3,873,409</u>	<u>(582,582)</u>	<u>5,991,374</u>
<b>NET ASSETS:</b>					
Unrestricted	<u>3,755,665</u>	<u>1,031,220</u>	<u>2,449,166</u>	<u>-</u>	<u>7,236,051</u>
Total net assets	<u>3,755,665</u>	<u>1,031,220</u>	<u>2,449,166</u>	<u>-</u>	<u>7,236,051</u>
Total liabilities and net assets	<u>\$ 6,099,219</u>	<u>\$ 1,388,213</u>	<u>\$ 6,322,575</u>	<u>\$ (582,582)</u>	<u>\$ 13,227,425</u>

The accompanying notes are an integral part of these financial statements.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**  
**For The Year Ended June 30, 2009**

	<b>PUC Los Angeles</b>	<b>PUC Valley</b>	<b>PUC Lakeview Terrace</b>	<b>Eliminations</b>	<b>Total</b>
<b><u>REVENUES</u></b>					
State revenue:					
State aid portion of general-					
purpose block grant	\$ 4,939,356	\$ 1,057,490	\$ 4,318,182	\$ -	\$ 10,315,028
Block grant - categorical	696,264	171,362	570,866	-	1,438,492
Other state revenue	2,321,245	372,995	1,639,441	-	4,333,681
Federal revenue	1,370,883	316,575	1,041,740	-	2,729,198
Local revenue:					
In-lieu property tax revenue	1,402,051	315,800	1,185,574	-	2,903,425
Interest income	9,228	-	38,172	-	47,400
Other revenue	484,491	395,368	3,180,611	(1,618,649)	2,441,821
Total revenues	<u>11,223,518</u>	<u>2,629,590</u>	<u>11,974,586</u>	<u>(1,618,649)</u>	<u>24,209,045</u>
<b><u>EXPENSES</u></b>					
Program services:					
Educational programs	8,985,692	1,758,895	7,022,804	-	17,767,391
Support services:					
General and administrative	<u>788,431</u>	<u>167,993</u>	<u>4,649,071</u>	<u>(1,618,649)</u>	<u>3,986,846</u>
Total expenses	<u>9,774,123</u>	<u>1,926,888</u>	<u>11,671,875</u>	<u>(1,618,649)</u>	<u>21,754,237</u>
Change in unrestricted net assets	1,449,395	702,702	302,711	-	2,454,808
Beginning unrestricted net assets	2,306,270	328,518	2,034,458	-	4,669,246
Adjustment for restatement (note 9)	-	-	111,997	-	111,997
Beginning unrestricted net assets	<u>2,306,270</u>	<u>328,518</u>	<u>2,146,455</u>	<u>-</u>	<u>4,781,243</u>
Ending unrestricted net assets	<u>\$ 3,755,665</u>	<u>\$ 1,031,220</u>	<u>\$ 2,449,166</u>	<u>\$ -</u>	<u>\$ 7,236,051</u>

The accompanying notes are an integral part of these financial statements.

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## CONSOLIDATED STATEMENT OF CASH FLOWS For The Year Ended June 30, 2009

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Total
<b>CASH FLOWS from OPERATING ACTIVITIES:</b>				
Change in Net Assets	\$ 1,449,395	\$ 702,702	\$ 302,711	\$ 2,454,808
Adjustments to reconcile change in net assets to net cash provided by operating activities:				
Depreciation	159,332	37,485	142,053	338,870
(Increase) and decrease in operating assets:				
Accounts receivable	(706,337)	(230,701)	(1,278,471)	(2,215,509)
Deposits and prepaid expenses	49,485	(36,637)	45,329	58,177
Other current assets	612	(304)	54,836	55,144
Increase and (decrease) in operating liabilities:				
Cash overdraft	294,697	-	2,467,589	2,762,286
Accounts payable	936,057	(25,330)	(1,077,911)	(167,184)
Accrued payroll and related expenses	140,783	33,912	91,800	266,495
Other current liabilities	(9,133)	-	73,116	63,983
Net cash provided by operating activities	<u>2,314,891</u>	<u>481,127</u>	<u>821,052</u>	<u>3,617,070</u>
<b>CASH FLOWS from INVESTING ACTIVITIES:</b>				
Payments received on loans receivable	-	-	17,887	17,887
Purchase of fixed assets	(1,185,808)	(58,526)	(265,519)	(1,509,853)
Net cash used by investing activities	<u>(1,185,808)</u>	<u>(58,526)</u>	<u>(247,632)</u>	<u>(1,491,966)</u>
<b>CASH FLOWS from FINANCING ACTIVITIES:</b>				
Repayment of long-term debt	(222,688)	-	(94,000)	(316,688)
Proceeds from long-term debt	345,976	250,000	188,000	783,976
Repayment of leases payable	(14,299)	(6,288)	(15,478)	(36,065)
Net cash provided by financing activities	<u>108,989</u>	<u>243,712</u>	<u>78,522</u>	<u>431,223</u>
Net increase in cash and cash equivalents	1,238,072	666,313	651,942	2,556,327
Cash and cash equivalents at the beginning of the year	<u>714,331</u>	<u>8,014</u>	<u>1,188,498</u>	<u>1,910,843</u>
Cash and cash equivalents at the end of the year	<u>\$ 1,952,403</u>	<u>\$ 674,327</u>	<u>\$ 1,840,440</u>	<u>\$ 4,467,170</u>
Cash paid for interest during the year	<u>\$ 12,903</u>	<u>\$ 850</u>	<u>\$ 10,419</u>	<u>\$ 24,172</u>

The accompanying notes are an integral part of these financial statements.

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2009

#### NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:

Business Activities – Partnerships to Uplift Communities (PUC) is made up of three tax-exempt nonprofit public-benefit corporations and was originally established in 2003. The corporate structure at PUC and the charter school entities changed in July 1, 2005 at which time the charter schools merged their operations into one corporate entity (PUC) that oversees the operations of the charter schools. In September 2008, the board of directors approved forming two additional corporations, PUC Los Angeles and PUC Valley, and changing the name of the existing corporation to PUC Lakeview Terrace. These three corporations, together with PUC Facilities LLC collectively make up Partnerships to Uplift Communities.

PUC manages eight charter schools authorized by LAUSD under separate charters. The PUC charter schools provide an improved learning facility for underprivileged children. The schools are California Academy for Liberal Studies Middle School and High School, Community Charter Middle School and High School, Milagro Charter School, Lakeview Charter Academy, Excel Charter Academy, and Triumph Charter Academy. Additionally, for the year ended June 30, 2009, the consolidated financial statements include predevelopment activities related to two new schools, Santa Rose Charter Academy and Nueva Esperanza. These two additional schools are expected to open for the 2009-2010 school year.

PUC corporate offices are located in Burbank, California in the County of Los Angeles. PUC's area of operation, including all school sites, is 113,700 square feet. PUC currently operates one elementary school (grades Kindergarten through 5), five middle schools, and two high schools.

Each of the charter schools under PUC pay management fees to PUC based on 7% of their revenues. The schools receive most of their support from the Federal and State governments under the authority of the State of California and the Los Angeles Unified School District (LAUSD).

Each charter school, approved by the Board of Education of LAUSD, is independent from the LAUSD in that all decisions, including those regarding management and the use of funds, are made at the charter school level.

Cash – PUC defines is cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less. Cash and cash equivalents as of June 30, 2009 consist of cash of \$988,401 held in different banks and \$496,873 held in the Los Angeles County Treasury.

Basis of Accounting – These consolidated financial statements are reported using the current financial resources measurement focus and the accrual basis of accounting. Revenues are recorded when susceptible to accrual, i.e., both measurable and available to finance expenditures of the fiscal period. "Available" means collectible within the current period or soon enough thereafter to pay current liabilities. Application of the "susceptibility to accrual" criteria requires consideration of the materiality of the item in question and due regard for the practicality of accrual, as well as consistency in application.

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2009

#### NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (continued)

Consolidation: - These consolidated financial statements include the accounts of three tax exempt nonprofit public benefit corporations (PUC Los Angeles, PUC Valley, and PUC Lakeview Terrace) and PUC Lakeview Terrace's subsidiary, PUC Facilities, LLC (a single member limited liability company). Collectively, these organizations make up Partnerships to Uplift Communities. PUC Facilities, LLC had no balances or activity as of and for the year ended June 30, 2009.

Investments – Earnings from investments are recorded as other local revenues in these consolidated financial statements. Interest income is recognized when earned.

Capital Assets – Capital assets purchased or acquired with an original cost of \$1,000 or more are reported at historical cost or estimated historical cost. Contributed assets are reported at fair market value as of the date received. Additions, improvements, and other capital outlays that significantly extend the useful life of an asset are capitalized. Other costs incurred for repairs and maintenance are expensed as incurred. Depreciation on all assets is provided on the straight-line basis over the various estimated useful lives of the assets which range from three to seven years for equipment and five to fifteen years for leasehold improvements.

Income Taxes – PUC Los Angeles, PUC Valley, and PUC Lakeview Terrace are nonprofit public-benefit corporations and have been recognized as tax-exempt pursuant to Sec. 501(c)(3) of the Internal Revenue code and 23701d of the California Revenue and Taxation Code. PUC Facilities, LLC is eligible for tax exemption under section 23701h of the California Revenue and Taxation Code. Accordingly, no provision for income taxes has been made.

Use of Estimates – The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Net Assets – Net assets of the organization and changes therein are classified and reported as follows:

**Unrestricted net assets** – New assets that are not subject to donor-imposed stipulations.

**Temporarily restricted net assets** – Net assets subject to donor-imposed stipulations that will be met either by actions of the School and/or the passage of time.

**Permanently restricted net assets** – Net assets subject to donor-imposed stipulations that they be maintained permanently by the School. Generally, the donors of these assets permit the School to use all or part of the income earned on related investments for general or specific purposed.

All contributions are considered to be for unrestricted purposes unless specifically restricted by the donor. All donor-restricted contributions made in the year ended June 30, 2009, whose restrictions have been met in this period, are included in the statement of activities as unrestricted revenue.



## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS June 30, 2009

#### **NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (continued)**

Compensated Absences – During 2008-2009, PUC had a “cash out” policy for PTO (unused vacation, sick time). For the teachers, any unused time at June 30, 2009 was accrued and cashed out in the last payroll of the year, paid 7/10/09.

Property Taxes – All jurisdictions within California derive their taxing authority from the State Constitution and various legislative provisions contained in the Government code and Revenue and Taxation Code. Property is assessed by the County Assessor and State Board of Equalization at 100% of full cash or market value (with limited exceptions) pursuant to Article XIII A of the California State Constitution and statutory provisions. The property tax levy to support general operations of the various jurisdictions is limited to one percent (1%) of assessed value and is distributed in accordance with statutory formulas. Amounts needed to finance the annual requirements of voter-approved debt are excluded from this limitation and are separately calculated and leveled each fiscal year. The rates are formally adopted by either the County Board of Supervisors or the city council, or in some cases, the government board of a special district.

Property taxes are levied on both real and personal property. Secured property taxes are levied on or before the first business day of September of each year. They become a lien on real property on January 1 preceding the fiscal year for which taxes are leveled. These tax payments can be made in two equal installments, the first is due November 1 and delinquent with penalties after December 10; the second is due February 1 and delinquent with penalties after April 10.

Secured property taxes, which are delinquent and unpaid as of June 30 are declared to be tax defaulted and are subject to redemption penalties, costs, and interest when paid. If the delinquent taxes are not paid at the end of five (5) years, the property is sold a public auction and the proceeds are used to pay the delinquent amounts due; an excess is remitted, if claimed; to the taxpayer.

Additional tax liens are created when there is a change in ownership of property or upon completion of new construction. Tax bills for these new tax liens are issued throughout the fiscal year and contain various payments and delinquent dates but are generally due within one year. If the new tax liens are lower, the taxpayer receives a tax refund rather than a tax bill. Unsecured personal property taxes are not a lien against the property. These taxes are due on March 1 and become delinquent if unpaid on August 31.

Subsequent Events – All events subsequent to the balance sheet date of June 30, 2009, through December 11, 2009, which is the date these financial statements were available to be issued, have been evaluated in accordance with FASB Statement on Accounting Standards 165, *Subsequent Events*. There were no subsequent events requiring recognition as of June 30, 2009.

# **PARTNERSHIPS TO UPLIFT COMMUNITIES**

## **NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS** **June 30, 2009**

### **NOTE 2 – CAPITAL ASSETS:**

A summary of changes in capital assets is as follows:

	Beginning Balance 7/1/2008	Additions	Disposals/ Adjustments	Ending Balance 6/30/2009
Work in progress				
PUC Los Angeles				
CA Academy for Liberal Studies	\$ -	\$ 1,085,351	\$ -	\$ 1,085,351
Leasehold improvements				
PUC Los Angeles				
CA Academy for Liberal Studies	484,633	6,000	-	490,633
CALS Early College High School	142,681	-	-	142,681
Milagro Charter School	68,360	-	-	68,360
Excel Charter Academy	85,303	19,225	-	104,528
PUC Valley				
Triumph Charter Academy	185,299	8,950	-	194,249
Nueva Esperanza	-	3,880	-	3,880
PUC Lakeview Terrace				
Community Charter Middle School	53,419	29,555	-	82,974
Community Charter Early College High School	53,850	32,839	-	86,689
Lakeview Charter Academy	50,120	44,302	-	94,422
PUC Home Office	700,586	102,173	-	802,759
Subtotal	1,824,251	246,924	-	2,071,175
Furniture and equipment				
PUC Los Angeles				
CA Academy for Liberal Studies	171,488	32,892	-	204,380
CALS Early College High School	255,510	14,394	-	269,904
Milagro Charter School	44,328	1,572	-	45,900
Excel Charter Academy	27,311	26,376	-	53,687
PUC Valley				
Triumph Charter Academy	34,952	45,696	-	80,648
PUC Lakeview Terrace				
Community Charter Middle School	52,206	1,572	-	53,778
Community Charter Early College High School	121,844	2,638	-	124,482
Lakeview Charter Academy	84,086	1,572	-	85,658
PUC Home Office	166,588	50,866	-	217,454
Subtotal	\$ 958,313	\$ 177,578	\$ -	\$ 1,135,891

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS June 30, 2009

#### NOTE 2 – CAPITAL ASSETS: (continued)

	Beginning Balance 7/1/2008	Additions	Disposals/ Adjustments	Ending Balance 6/30/2009
Less: Accumulated depreciation				
PUC Los Angeles				
CA Academy for Liberal Studies	\$ (514,611)	\$ (57,103)	\$ -	\$ (571,714)
CALS Early College High School	(195,665)	(54,001)	-	(249,666)
Milagro Charter School	(56,102)	(21,038)	-	(77,140)
Excel Charter Academy	(21,817)	(27,190)	-	(49,007)
PUC Valley				
Triumph Charter Academy	(48,525)	(37,485)	-	(86,010)
PUC Lakeview Terrace				
Community Charter Middle School	(44,407)	(11,870)	-	(56,277)
Community Charter Early College High School	(75,491)	(31,494)	-	(106,985)
Lakeview Charter Academy	(82,601)	(29,128)	-	(111,729)
PUC Home Office	(93,288)	(69,560)	-	(162,848)
Subtotal	(1,132,507)	(338,869)	-	(1,471,376)
Net Capital Assets	\$ 1,650,057	\$ 1,170,984	\$ -	\$ 2,821,041

#### NOTE 3 – RETIREMENT PLANS:

Qualified employees of PUC are covered under a multiple-employer defined benefit requirement plan maintained by an agency of the State of California. The retirement plan is the State Teachers' Retirement System (STRS). In general, only certificated employees can be members of STRS.

California State Teachers' Retirement Systems (STRS) – PUC contributes to the STRS, a cost-sharing multiple-employer public employee retirement system defined benefit pension plan and a tax deferred supplemental program established and administered by the State Teachers' Retirement Law (Section 22000 etc. seq.) on the California Education Code. The Teachers' Retirement Fund (TRF) is a defined benefit pension plan under the STRS. At June 30, 2009, there were approximately 1,200 contributing employers (school districts, community college districts, county offices of education and regional occupational programs). The State of California is a non-employer contributor to the TRF.

The Plan provides defined retirement benefits based on members' final compensation, age, and years of credited service. In addition, the retirement program provides benefits to members upon disability, and to survivors upon the death of eligible members. Benefit provisions are established by state statutes, as legislatively amended, within the State Teachers' Retirement Law. STRS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. Copies of the STRS annual financial reports may be obtained from STRS, 7667 Folsom Boulevard, Sacramento, California 95826.

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2009

#### **NOTE 3 – RETIREMENT PLANS: (continued)**

Active plan members are required to contribute 8.0% of their salary and the District is required to contribute based on an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the STRS Teachers' Retirement Board. The required employer contribution rate for fiscal year 2008-2009 was 8.25% of annual payroll. The contribution requirements of the plan members are established by state statute.

PUC's contributions to STRS for the fiscal year ended June 30, 2009, were equal to the required contributions at statutory rates. The state's annual contribution to the system is 2% of the previous calendar year's teacher payroll. Subsequent to achieving a fully funded System, the state will contribute only the amount necessary to help fund the normal cost of the current benefit program unless a subsequent unfunded obligation occurs.

#### **NOTE 4 – DONATED SERVICES:**

No amounts have been reflected in the consolidated financial statements for donated services since no objective basis is available to measure the value of the services. However, some volunteers have donated their time to the PUC schools.

#### **NOTE 5 – CONCENTRATIONS OF CREDIT RISK:**

PUC maintains some of its cash balances in the Los Angeles County treasury. The balances held with the County treasury are insured. PUC also maintains various bank accounts with commercial institutions. At June 30, 2009, the balances in these institutions were insured by the FDIC up to \$250,000, and the balances, at times, exceeded the insured amount. At June 30, 2009, PUC's uninsured cash balances totaled \$951,303.

#### **NOTE 6 – OPERATING LEASES:**

PUC leases its facilities and certain equipment under various operating lease agreements. Future minimum commitments under operating leases are as follows:

	2010	2011	2012	2013	2014	Thereafter	Total
PUC Los Angeles							
CALS HS	\$ 321,240	\$ 321,240	\$ 53,540	\$ -	\$ -	\$ -	\$ 696,020
Milagro	517,782	535,906	554,664	574,088	594,184	1,358,152	4,134,776
PUC Valley							
Triumph	82,549	6,896	-	-	-	-	89,445
PUC Lakeview Terrace							
CCMS/CCHS/Lakeview	1,066,879	1,093,415	1,161,917	1,277,564	1,405,320	3,387,993	9,393,088
PUC Home Office	201,408	204,093	104,142	84,000	84,000	-	677,643
Total	<u>\$2,189,858</u>	<u>\$2,161,550</u>	<u>\$1,874,263</u>	<u>\$1,935,652</u>	<u>\$2,083,504</u>	<u>\$4,746,145</u>	<u>\$14,990,972</u>

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

**June 30, 2009**

**NOTE 7 – CAPITAL LEASES:**

PUC leases copiers and computers under various capital lease agreements. Total future commitments under capital leases are as follows:

For the Year  
Ending June 30,

2010	\$ 4,953
2011	<u>1,901</u>
Total	<u>\$ 6,854</u>

**NOTE 8 – LOANS PAYBLE:**

In August 2008, PUC received a \$533,976 loan from the California Charter School Association. The loan bears a 6.25% interest rate and requires repayment in three installments. The first two installments of \$133,344 each were due in April and May 2009. The final installment of \$267,288 is due in the next fiscal year.

In November 2008, Triumph Charter Academy received a revolving loan from the California Department of Education (CDE) in the amount of \$250,000. The loan bears a 2.63% interest rate and requires repayment in five annual installments.

Future commitments under these two loans payable are as follows:

For the Year  
Ending June 30,

2010	\$ 317,288
2011	50,000
2012	50,000
2013	50,000
2014	<u>50,000</u>
Total	<u>\$ 517,288</u>

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

**June 30, 2009**

**NOTE 9 – ADJUSTMENT FOR RESTATEMENT:**

It was discovered in the current fiscal year that a payment for STRS was recorded incorrectly as an expense in a prior year rather than reducing the STRS liability. An adjustment of \$111,997 was made to beginning net assets accordingly.

**NOTE 10 – LOSS CONTINGENCY:**

PUC is currently in the process of settling a claim regarding Lakeview Charter Academy. The estimated loss of \$66,491 has been accrued as of June 30, 2009 and is included in other accrued liabilities in the consolidated statement of financial position.



## **SUPPLEMENTARY INFORMATION SECTION**

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### HISTORY AND ORGANIZATION For the Year Ended June 30, 2009

Partnerships to Uplift Communities (PUC) is made up of three tax-exempt nonprofit public-benefit corporations and was originally established in 2003. PUC manages the following eight charter schools authorized by the LAUSD under separate charters:

- Community Charter Middle School (CCMS) – Established: 1999 – Charter Number: 0213
- California Academy for Liberal Studies (CALSMS) – Established: 2000 – Charter Number: 0331
- Lakeview Charter Academy (LAKEVIEW) – Established: 2003 – Charter Number: 0603
- Milagro Charter School (MILAGRO) – Established: 2003 – Charter Number: 0600
- Community Charter Early College High School (CCHS) – Established: 2005 – Charter Number: 0733
- CALS Early College High School (CALSHS) – Established: 2005 – Charter Number: 0710
- Excel Charter Academy (EXCEL) – Established: 2006 – Charter Number: 0798
- Triumph Charter Academy (TRIUMPH) – Established: 2006 – Charter Number: 0797

#### Board of Trustees

<u>Name</u>	<u>Office</u>	<u>Term Expires</u>
John Biroc	Chair	June 2010
Julie Mikuta	Vice Chair	November 2009
Jacqueline Elliot	Secretary	June 2009
Ref Rodriguez	Treasurer	June 2009
Jeanne Adams	Board Member	June 2009
Gabriel Sandoval	Board Member	June 2009
Ed Palmer	Board Member	June 2009
George Fatheree	Board Member	October 2010

#### Administration

Ref Rodríguez	Co-CEO
Jacqueline Elliot	Co-CEO
Natalie Yildiz	Accounting Manager
Kelly Montes de Oca	Director of Leadership
Malena Otero	Director of Human Resources
Catalina Saenz	Director of Math Instruction (through 12/17/08)
Jason Roberts	Director of Operations (through 9/29/09)
Jacqueline Duvivier	Director of Business Development
Pete Cordero	Director of School Support Services
Christine Sartiaguda	Director of Clinical Services (through 9/11/09)
Ed Vandenberg	Regional Director, Valley Schools
Nik Orlando	Regional Director, LA Schools

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**SCHEDULE OF INSTRUCTIONAL MINUTES**

**For the Year Ended June 30, 2009**

Charter School	Grade Level	2008-09 Minutes		Days	Status
		Requirement	Actual		
Milagro Charter School	Kindergarten	36,000	58,565	176	In compliance
	Grade 1	50,400	56,210	176	In compliance
	Grade 2	50,400	56,210	176	In compliance
	Grade 3	50,400	56,210	176	In compliance
	Grade 4	54,000	56,210	176	In compliance
	Grade 5	54,000	56,210	176	In compliance
Community Charter Middle School	Grade 6	54,000	64,070	176	In compliance
	Grade 7	54,000	54,290	176	In compliance
	Grade 8	54,000	54,290	176	In compliance
Lakeview Charter Academy Middle School	Grade 6	54,000	66,000	176	In compliance
	Grade 7	54,000	56,320	176	In compliance
Excel Charter Academy	Grade 6	54,000	64,592	176	In compliance
	Grade 7	54,000	64,592	176	In compliance
	Grade 8	54,000	64,592	176	In compliance
California Academy for Liberal Studies	Grade 6	54,000	59,785	176	In compliance
	Grade 7	54,000	59,785	176	In compliance
	Grade 8	54,000	59,785	176	In compliance
Triumph Charter Academy	Grade 6	54,000	56,320	176	In compliance
	Grade 7	54,000	56,320	176	In compliance
	Grade 8	54,000	56,320	176	In compliance
Community Charter Early College High School	Grade 9	64,800	66,015	176	In compliance
	Grade 10	64,800	66,015	176	In compliance
	Grade 11	64,800	66,015	176	In compliance
	Grade 12	64,800	66,015	176	In compliance
CALS Early College High School	Grade 9	64,800	72,065	176	In compliance
	Grade 10	64,800	72,065	176	In compliance
	Grade 11	64,800	72,065	176	In compliance
	Grade 12	64,800	72,065	176	In compliance

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**SCHEDULE OF AVERAGE DAILY ATTENDANCE (ADA)  
For the Year Ended June 30, 2009**

Charter School	Grade Levels	Second Period Report		Annual Report	
		Classroom Based	Total	Classroom Based	Total
Milagro Charter School	Kindergarten	37.74	37.74	37.61	37.61
	Grades 1 through 3	116.58	116.58	116.02	116.02
	Grades 4 through 6	75.26	75.26	74.74	74.74
	ADA Totals	229.58	229.58	228.37	228.37
Community Charter Middle School	Grades 4 through 6	108.88	108.88	108.06	108.06
	Grades 7 through 8	197.03	197.03	195.84	195.84
	ADA Totals	305.91	305.91	303.90	303.90
Lakeview Charter Academy	Grades 4 through 6	108.34	108.34	107.64	107.64
	Grades 7 through 8	109.72	109.72	107.47	107.47
	ADA Totals	218.06	218.06	215.11	215.11
Excel Charter Academy	Grades 4 through 6	103.33	103.33	103.27	103.27
	Grades 7 through 8	180.04	180.04	179.48	179.48
	ADA Totals	283.37	283.37	282.75	282.75
Triumph Charter Academy	Grades 4 through 6	54.90	54.90	54.24	54.24
	Grades 7 through 8	185.70	185.70	184.31	184.31
	ADA Totals	240.60	240.60	238.55	238.55
California Academy for Liberal Studies	Grades 4 through 6	78.08	78.08	77.66	77.66
	Grades 7 through 8	170.54	170.54	169.02	169.02
	ADA Totals	248.62	248.62	246.68	246.68
Community Charter Early College HS	Grades 9 through 12	379.29	379.29	375.94	375.94
	ADA Totals	379.29	379.29	375.94	375.94
CALS Early College High School					
	Grades 9 through 12	306.62	306.62	302.03	302.03
	ADA Totals	306.62	306.62	302.03	302.03

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**SCHEDULE OF AVERAGE DAILY ATTENDANCE (ADA)**  
**(continued)**  
**For the Year Ended June 30, 2009**

Supplemental Hours of Attendance:

Number of Pupil Hours:

7 - 12 Core Instruction	California Academy for Liberal Studies	283
7 - 12 Remedial Instruction	Lakeview Charter Academy	1,028
	Excel Charter Academy	3,116
	Triumph Charter Academy	4,900
	California Academy for Liberal Studies	2,690
	Community Charter Early College HS	4,842
	CALS Early College High School	5,794
7 - 12 Pupil at Risk of Retention	Excel Charter Academy	2,802
	Triumph Charter Academy	1,642
	California Academy for Liberal Studies	<u>1,563</u>
Total Supplemental Hours of Attendance		<u>28,660</u>

See the accompanying notes to the supplementary information.

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## SCHEDULE OF FEDERAL EXPNDITURES For the Year Ended June 30, 2009

Federal Grantor/Pass-Through Grantor/Program or Cluster Title	Federal CFDA Number	Pass- Through Entity Identifying Number	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Total Federal Expenditures
<b>U.S. Department of Education</b>						
Pass Through the California Department of Education						
No Child Left Behind Act and American						
Recovery and Reinvestment Act:						
Title I Cluster:						
Title I, Part A, Basic	84.010	14329	\$ 173,489	\$ 38,033	\$ 123,300	\$ 334,822
ARRA: Title I, Part A, Basic	84.389	15005	27,756	-	33,481	61,237
Subtotal: Title I Cluster			201,245	38,033	156,781	396,059
Title II, Part A, Improving Teacher Quality	84.367	14341	35,447	10,338	36,234	82,019
Title II, EETT - Technology Grant	84.318	14334	3,764	869	3,257	7,890
Title III, Part A, Limited English Proficiency	84.365	10084	-	-	35,663	35,663
Title V, Part A, Innovative Education	84.298A	14354	24,868	2,160	8,511	35,539
ARRA: State Fiscal Stabilization Fund	84.394	25008	67,448	-	82,212	149,660
Subtotal: Pass-Through Programs			332,772	51,400	322,658	706,830
<i>Total U.S. Department of Education</i>			332,772	51,400	322,658	706,830
<b>U.S. Department of Agriculture</b>						
Pass Through the California Department of Education						
Child Nutrition Programs	10.555	13391	325,624	72,412	191,218	589,254
<i>Total U.S. Department of Agriculture</i>			325,624	72,412	191,218	589,254
<b>Total Expenditures for Federal Awards</b>			<u>\$ 658,396</u>	<u>\$ 123,812</u>	<u>\$ 513,876</u>	<u>\$ 1,296,084</u>
<b>Reconciliation to Federal Revenues</b>						
Total Federal Program Expenditures			\$ 658,396	\$ 123,812	\$ 513,876	\$ 1,296,084
<b>Revenues in excess of expenditures related to Federal programs:</b>						
Title I, Part A, Basic	84.010	14329	253,548	63,831	178,088	495,467
ARRA: State Fiscal Stabilization Fund	84.394	15005	110,778	37,726	70,904	219,408
Title IV Part A, Drug Free Schools	84.186	14347	348,161	91,206	278,872	718,239
			<u>\$ 1,370,883</u>	<u>\$ 316,575</u>	<u>\$ 1,041,740</u>	<u>\$ 2,729,198</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 1,307,328
Accounts receivable	426,051
Deposits and prepaid expenses	<u>19,525</u>
Total current assets	<u>1,752,904</u>

**LONG-TERM ASSETS:**

Work in progress	1,085,351
Leasehold improvements	490,633
Furniture and equipment	204,380
Less: Accumulated depreciation	<u>(571,714)</u>
Total long-term assets	<u>1,208,650</u>
Total assets	<u><u>\$ 2,961,554</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 860,065
Accrued payroll and related expenses	103,576
Intercompany payable	250,000
Current portion of loans payable	<u>20,800</u>
Total current liabilities	<u>1,234,441</u>
Total liabilities	<u>1,234,441</u>

**NET ASSETS:**

Unrestricted	<u>1,727,113</u>
Total net assets	<u>1,727,113</u>
Total liabilities and net assets	<u><u>\$ 2,961,554</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,092,266
Block grant - categorical	184,760
Other state revenue	519,004
Federal revenue	392,318
Local revenue:	
In-lieu property tax revenue	326,326
Contribution from PUC home office	-
Interest income	9,227
Other revenue	<u>35,800</u>
Total unrestricted revenues	<u>2,559,701</u>

**EXPENSES:**

Program services:	
Educational programs	2,038,911
Support services:	
General and administrative	<u>172,813</u>
Total expenses	<u>2,211,724</u>
Change in unrestricted net assets	347,977
Beginning unrestricted net assets	<u>1,379,136</u>
Ending unrestricted net assets	<u>\$ 1,727,113</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**

**RECONCILIATION OF ANNUAL FINANCIAL REPORT**

**WITH AUDITED FINANCIAL STATEMENTS**

**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 1,746,262

Adjustments and Reclassifications:

Increasing (Decreasing) the Fund Balance (Net Assets):

Cash and cash equivalents understated	35,433
Accounts receivable understated	9,089
Prepaid expenses overstated	(44,000)
Other current assets overstated	(6,000)
Work in progress understated	1,085,351
Leasehold improvements overstated	(11,677)
Furniture and equipment understated	26,679
Accumulated depreciation understated	(57,104)
Accounts payable understated	(1,055,834)
Current loans understated	<u>(1,086)</u>
Net Adjustments and Reclassifications	<u>(19,149)</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 1,727,113</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 330,556
Accounts receivable	777,609
Deposits and prepaid expenses	67,041
Other current assets	<u>5,284</u>
Total current assets	<u>1,180,490</u>

**LONG-TERM ASSETS:**

Leasehold improvements	142,681
Furniture and equipment	269,904
Less: Accumulated depreciation	<u>(249,666)</u>
Total long-term assets	<u>162,919</u>
Total assets	<u>\$ 1,343,409</u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 67,186
Accrued payroll and related expenses	129,374
Current portion of leases payable	4,161
Current portion of loans payable	<u>28,800</u>
Total current liabilities	229,521

**LONG-TERM LIABILITIES:**

Leases payable - long term portion	<u>1,901</u>
Total liabilities	<u>231,422</u>

**NET ASSETS:**

Unrestricted	<u>1,111,987</u>
Total net assets	<u>1,111,987</u>
Total liabilities and net assets	<u>\$ 1,343,409</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**

**EARLY COLLEGE HIGH SCHOOL**

**SUPPLEMENTARY STATEMENT OF ACTIVITIES**

**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,641,464
Block grant - categorical	185,460
Other state revenue	558,206
Federal revenue	313,026
Local revenue:	
In-lieu property tax revenue	402,454
Other revenue	<u>85,088</u>
Total unrestricted revenues	<u>3,185,698</u>

**EXPENSES:**

Program services:	
Educational programs	2,519,177
Support services:	
General and administrative	<u>238,782</u>
Total expenses	<u>2,757,959</u>
Change in unrestricted net assets	427,739
Beginning unrestricted net assets	<u>684,248</u>
Ending unrestricted net assets	<u>\$ 1,111,987</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 1,135,904

Adjustments and Reclassifications:

Increasing (Decreasing) the Fund Balance (Net Assets):

Cash understated	40,702
Accounts receivable overstated	(10,074)
Prepaid expenses understated	19,071
Other current assets overstated	(17,550)
Leasehold improvements understated	3,100
Furniture and equipment understated	19,906
Accumulated depreciation understated	(54,000)
Accounts payable understated	(23,562)
Current loans understated	<u>(1,510)</u>
Net Adjustments and Reclassifications	<u>(23,917)</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 1,111,987</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 964,489
Accounts receivable	485,452
Intercompany accounts receivable	332,582
Deposits and prepaid expenses	31,848
Other current assets	<u>2,230</u>
Total current assets	<u>1,816,601</u>

**LONG-TERM ASSETS:**

Leasehold improvements	82,974
Furniture and equipment	53,778
Less: Accumulated depreciation	<u>(56,277)</u>
Total long-term assets	<u>80,475</u>
Total assets	<u>\$ 1,897,076</u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 98,549
Accrued payroll and related expenses	99,118
Current portion of leases payable	<u>317</u>
Total current liabilities	<u>197,984</u>
Total liabilities	<u>197,984</u>

**NET ASSETS:**

Unrestricted	<u>1,699,092</u>
Total net assets	<u>1,699,092</u>
Total liabilities and net assets	<u>\$ 1,897,076</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,341,722
Block grant - categorical	209,479
Other state revenue	676,055
Federal revenue	409,957
Local revenue:	
In-lieu property tax revenue	401,522
Interest income	5,336
Other revenue	<u>56,805</u>
Total unrestricted revenues	<u>3,100,876</u>

**EXPENSES:**

Program services:	
Educational programs	2,281,445
Support services:	
General and administrative	<u>212,786</u>
Total expenses	<u>2,494,231</u>
Change in unrestricted net assets	<u>606,645</u>
Beginning unrestricted net assets	980,450
Adjustment for restatement	<u>111,997</u>
Beginning unrestricted net assets, as restated (note 10)	<u>1,092,447</u>
Ending unrestricted net assets	<u>\$ 1,699,092</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report Fund Balances (Net Assets)	\$ 1,526,059
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Adjustments and Reclassifications:

Increasing (Decreasing) the Fund Balance (Net Assets):

Cash and cash equivalents understated	37,800
Accounts receivable overstated	198,988
Prepaid expenses overstated	(5,125)
Other current assets understated	2,230
Leasehold improvements understated	37,078
Furniture and equipment understated	8,798
Accumulated depreciation understated	(11,870)
Accounts payable overstated	(94,549)
Leases payable understated	<u>(317)</u>
Net Adjustments and Reclassifications	<u>173,033</u>
June 30, 2009 Audited Financial Statement Fund Balances (Net Assets)	<u>\$ 1,699,092</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL  
SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**

**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 11,646
Accounts receivable	917,132
Deposits and prepaid expenses	44,133
Other current assets	<u>7,309</u>
Total current assets	<u>980,220</u>

**LONG-TERM ASSETS:**

Leasehold improvements	86,689
Furniture and equipment	124,482
Less: Accumulated depreciation	<u>(106,985)</u>
Total long-term assets	<u>104,186</u>
Total assets	<u><u>\$ 1,084,406</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Cash overdraft	\$ 576,829
Accounts payable	82,415
Accrued payroll and related expenses	187,390
Current portion of loans payable	<u>94,000</u>
Total current liabilities	<u>940,634</u>
Total liabilities	<u>940,634</u>

**NET ASSETS:**

Unrestricted	<u>143,772</u>
Total net assets	<u>143,772</u>
Total liabilities and net assets	<u><u>\$ 1,084,406</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 2,030,687
Block grant - categorical	233,681
Other state revenue	632,980
Federal revenue	368,326
Local revenue:	
In-lieu property tax revenue	497,837
Other revenue	<u>55,917</u>
Total unrestricted revenues	<u>3,819,428</u>

**EXPENSES:**

Program services:	
Educational programs	2,963,124
Support services:	
General and administrative	<u>297,097</u>
Total expenses	<u>3,260,221</u>
Change in unrestricted net assets	559,207
Beginning unrestricted net assets	<u>(415,435)</u>
Ending unrestricted net assets	<u>\$ 143,772</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 149,012
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents overstated	2,312
Prepaid expenses overstated	(8,179)
Leasehold improvements understated	32,360
Furniture and equipment understated	1,572
Accumulated depreciation understated	(31,494)
Accounts payable understated	(52,911)
Current loans overstated	<u>51,100</u>
Net Adjustments and Reclassifications	<u>(5,240)</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 143,772</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**EXCEL CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 13,846
Accounts receivable	639,790
Deposits and prepaid expenses	<u>36,130</u>
Total current assets	<u>689,766</u>

**LONG-TERM ASSETS:**

Leasehold improvements	104,528
Furniture and equipment	53,687
Less: Accumulated depreciation	<u>(49,007)</u>
Total long-term assets	<u>109,208</u>
Total assets	<u><u>\$ 798,974</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Cash overdraft	\$ 143,082
Accounts payable	84,771
Accrued payroll and related expenses	112,782
Current portion of loans payable	<u>73,688</u>
Total current liabilities	<u>414,323</u>
Total liabilities	<u>414,323</u>

**NET ASSETS:**

Unrestricted	<u>384,651</u>
Total net assets	<u>384,651</u>
Total liabilities and net assets	<u><u>\$ 798,974</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**EXCEL CHARTER ACADEMY  
SUPPLEMENTARY STATEMENT OF ACTIVITIES  
For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,236,316
Block grant - categorical	178,142
Other state revenue	598,238
Federal revenue	359,051
Local revenue:	
In-lieu property tax revenue	371,936
Other revenue	<u>45,763</u>
Total unrestricted revenues	<u>2,789,446</u>

**EXPENSES:**

Program services:	
Educational programs	2,363,081
Support services:	
General and administrative	<u>201,700</u>
Total expenses	<u>2,564,781</u>
Change in unrestricted net assets	224,665
Beginning unrestricted net assets	<u>159,986</u>
Ending unrestricted net assets	<u>\$ 384,651</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**EXCEL CHARTER ACADEMY  
RECONCILIATION OF ANNUAL FINANCIAL REPORT  
WITH AUDITED FINANCIAL STATEMENTS  
For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 456,462
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash overstated	(1,125)
Accounts receivable overstated	(1,500)
Leasehold improvements overstated	(39,870)
Furniture and equipment understated	7,715
Accumulated depreciation understated	(27,190)
Accounts payable understated	(20,930)
Current loans overstated	<u>11,089</u>
Net Adjustments and Reclassifications	<u>(71,811)</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 384,651</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**LAKEVIEW CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 43,906
Accounts receivable	413,939
Advances	1,322
Deposits and prepaid expenses	<u>33,730</u>
Total current assets	<u>492,897</u>

**LONG-TERM ASSETS:**

Leasehold improvements	94,422
Furniture and equipment	85,658
Less: Accumulated depreciation	<u>(111,729)</u>
Total long-term assets	<u>68,351</u>
Total assets	<u><u>\$ 561,248</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Cash overdraft	\$ 428,750
Accounts payable	84,555
Accrued payroll and related expenses	70,028
Other current liabilities (note 10)	66,491
Current portion of leases payable	<u>393</u>
Total current liabilities	<u>650,217</u>
Total liabilities	<u>650,217</u>

**NET ASSETS:**

Unrestricted	<u>(88,969)</u>
Total net assets	<u>(88,969)</u>
Total liabilities and net assets	<u><u>\$ 561,248</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**LAKEVIEW CHARTER ACADEMY**

**SUPPLEMENTARY STATEMENT OF ACTIVITIES**

**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 945,773
Block grant - categorical	127,706
Other state revenue	330,406
Federal revenue	263,457
Local revenue:	
In-lieu property tax revenue	286,215
Interest income	
Other revenue	<u>41,619</u>
Total unrestricted revenues	<u>1,995,176</u>

**EXPENSES:**

Program services:	
Educational programs	1,778,235
Support services:	
General and administrative	<u>152,339</u>
Total expenses	<u>1,930,574</u>
Change in unrestricted net assets	64,602
Beginning unrestricted net assets	<u>(153,571)</u>
Ending unrestricted net assets	<u>\$ (88,969)</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**LAKEVIEW CHARTER ACADEMY**

**RECONCILIATION OF ANNUAL FINANCIAL REPORT**

**WITH AUDITED FINANCIAL STATEMENTS**

**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ (23,199)

Adjustments and Reclassifications:

Increasing (Decreasing) the Fund Balance (Net Assets):

Cash and cash equivalents overstated	(20)
Prepaid expenses overstated	(18,450)
Leasehold improvements understated	45,532
Furniture and equipment understated	3,666
Accumulated depreciation understated	(29,128)
Accounts payable understated	(3,237)
Other current liabilities understated	(66,491)
Capital leases payable overstated	<u>2,358</u>
Net Adjustments and Reclassifications	<u>(65,770)</u>

June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	\$ <u>(88,969)</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**MILAGRO CHARTER SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 51,419
Accounts receivable	587,715
Deposits and prepaid expenses	<u>69,528</u>
Total current assets	<u>708,662</u>

**LONG-TERM ASSETS:**

Leasehold improvements	68,360
Furniture and equipment	45,900
Less: Accumulated depreciation	<u>(77,140)</u>
Total long-term assets	<u>37,120</u>
Total assets	<u><u>\$ 745,782</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Cash overdraft	\$ 151,615
Accounts payable	95,443
Accrued payroll and related expenses	166,252
Current portion of loans payable	<u>50,000</u>
Total current liabilities	<u>463,310</u>
Total liabilities	<u>463,310</u>

**NET ASSETS:**

Unrestricted	<u>282,472</u>
Total net assets	<u>282,472</u>
Total liabilities and net assets	<u><u>\$ 745,782</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**MILAGRO CHARTER SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 969,309
Block grant - categorical	147,902
Other state revenue	645,797
Federal revenue	306,488
Local revenue:	
In-lieu property tax revenue	301,335
Other revenue	<u>67,841</u>
Total unrestricted revenues	<u>2,438,672</u>

**EXPENSES:**

Program services:	
Educational programs	2,063,964
Support services:	
General and administrative	<u>175,136</u>
Total expenses	<u>2,239,100</u>
Change in unrestricted net assets	199,572
Beginning unrestricted net assets	<u>82,900</u>
Ending unrestricted net assets	<u><u>\$ 282,472</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**MILAGRO CHARTER SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 261,635
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash understated	4,339
Leasehold improvements understated	5,139
Furniture and equipment understated	4,857
Accumulated depreciation understated	(21,038)
Accounts payable understated	(14,959)
Current loans overstated	<u>42,499</u>
Net Adjustments and Reclassifications	<u>20,837</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 282,472</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**TRIUMPH CHARTER ACADEMY**

**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**

**June 30, 2009**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 478,770
Accounts receivable	460,381
Deposits and prepaid expenses	20,818
Other current assets	<u>304</u>
Total current assets	<u>960,273</u>

**LONG-TERM ASSETS:**

Leasehold improvements	194,249
Furniture and equipment	80,648
Less: Accumulated depreciation	<u>(86,010)</u>
Total long-term assets	<u>188,887</u>
Total assets	<u>\$ 1,149,160</u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 28,953
Accrued payroll and related expenses	77,719
Current portion of loans payable	<u>50,000</u>
Total current liabilities	<u>156,672</u>

**LONG-TERM LIABILITIES:**

Long-term portion of loans payable	<u>200,000</u>
Total long-term liabilities	<u>200,000</u>
Total liabilities	<u>356,672</u>

**NET ASSETS:**

Unrestricted	<u>792,488</u>
Total net assets	<u>792,488</u>
Total liabilities and net assets	<u>\$ 1,149,160</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**TRIUMPH CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2009**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,057,490
Block grant - categorical	171,362
Other state revenue	372,995
Federal revenue	316,575
Local revenue:	
In-lieu property tax revenue	315,800
Other revenue	<u>145,368</u>
Total unrestricted revenues	<u>2,379,590</u>

**EXPENSES:**

Program services:	
Educational programs	1,747,709
Support services:	
General and administrative	<u>167,993</u>
Total expenses	<u>1,915,702</u>
Change in unrestricted net assets	463,888
Beginning unrestricted net assets	<u>328,600</u>
Ending unrestricted net assets	<u>\$ 792,488</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**TRIUMPH CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2009**

June 30, 2009 Annual Financial Report	
Fund Balances (Net Assets)	\$ 776,937
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents understated	28,102
Leasehold improvements overstated	(5,086)
Furniture and equipment understated	43,023
Accumulated depreciation understated	(37,485)
Accounts payable understated	(14,575)
Capital leases payable overstated	<u>1,572</u>
Net Adjustments and Reclassifications	<u>15,551</u>
June 30, 2009 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ 792,488</u></u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**NOTES TO SUPPLEMENTARY INFORMATION**

**For the Year Ended June 30, 2009**

**NOTE 1 - PURPOSE OF SCHEDULES:**

**A. Schedule of Instructional Time Offered**

This schedule presents information on the amount of instructional time offered by the Schools and whether the Schools complied with the provisions of Education Code Sections 46200 through 46206.

**B. Schedule of Average Daily Attendance (ADA)**

Average daily attendance is a measurement of the number of pupils attending classes of the Schools. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of state funds are made to charter schools. This schedule provides information regarding the attendance of students at various grade levels and in different programs.

**C. Schedule of Federal Expenditures**

OMB Circular A-133 requires disclosure of the financial activities of all federally funded programs. To comply with A-133, this schedule was prepared for the organization and is presented on the accrual basis of accounting.

**D. Charter School Financial Statements and Reconciliations of Annual Financial Reports with Audited Financial Statements**

These financial statements consist of a statement of financial position and a statement of activities for each charter school and a reconciliation that provides the information necessary to reconcile the fund balance (net assets) as reported on the annual financial report to the audited financial statements.



**REPORT ON INTERNAL CONTROL OVER FINANCIAL  
REPORTING AND ON COMPLIANCE AND OTHER  
MATTERS BASED ON AN AUDIT OF FINANCIAL  
STATEMENTS PERFORMED IN ACCORDANCE  
WITH *GOVERNMENT AUDITING STANDARDS***

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the consolidated financial statements of Partnerships to Uplift Communities (PUC) as of and for the year ended June 30, 2009, and have issued our report thereon dated December 11, 2009. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States.

Internal Control Over Financial Reporting

In planning and performing our audit, we considered PUC's internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinions on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of the PUC's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of PUC's internal control over financial reporting.

A control deficiency exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect misstatements on a timely basis. A significant deficiency is a control deficiency, or a combination of control deficiencies, that adversely affects PUC's ability to initiate, authorize, record, process, or report financial data reliably in accordance with generally accepted accounting principles such that there is more than a remote likelihood that a misstatement of PUC's consolidated financial statements that is more than inconsequential will not be prevented or detected by PUC's internal control.

A material weakness is a significant deficiency, or a combination of significant deficiencies, that results in more than a remote likelihood that a material misstatement of the consolidated financial statements will not be prevented or detected by the PUC's internal control.

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and would not necessarily identify all deficiencies in internal control that might be significant deficiencies or material weaknesses. We did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses, as defined above.

**REPORT ON INTERNAL CONTROL OVER FINANCIAL  
REPORTING AND ON COMPLIANCE AND OTHER  
MATTERS BASED ON AN AUDIT OF FINANCIAL  
STATEMENTS PERFORMED IN ACCORDANCE  
WITH *GOVERNMENT AUDITING STANDARDS***

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the PUC's consolidated financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed instances of non-compliance or other matters that are required to be reported under *Government Auditing Standards* and which are described in the accompanying schedule of findings and questioned costs as Finding 2009-1, Finding 2009-2, Finding 2009-3, and Finding 2009-4.

PUC's responses to the findings identified in our audit are described in the accompanying schedule of findings and questioned costs. We did not audit PUC's responses and, accordingly, we express no opinion on them.

This report is intended solely for the information and use of the Board, management, the Los Angeles Unified School District and federal and state awarding agencies and is not intended to be and should not be used by anyone other than these specified parties.

  
VICENTI, LLOYD & STUTZMAN LLP

December 11, 2009



**REPORT ON COMPLIANCE WITH REQUIREMENTS  
APPLICABLE TO EACH MAJOR PROGRAM  
AND ON INTERNAL CONTROL OVER COMPLIANCE  
IN ACCORDANCE WITH OMB CIRCULAR A-133**

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

Compliance

We have audited the compliance of Partnership to Uplift Communities (PUC) with the types of compliance requirements described in the U.S. Office of Management and Budget (OMB) Circular A-133 Compliance Supplement that are applicable to each of its major federal programs for the year ended June 30, 2009. PUC's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs. Compliance with the requirements of laws, regulations, contracts and grants applicable to each of its major federal programs is the responsibility of PUC's management. Our responsibility is to express an opinion on PUC's compliance based on our audit.

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States; and OMB Circular A-133, Audits of States, Local Governments, and Nonprofit Organizations. These standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about PUC's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of PUC's compliance with those requirements.

In our opinion, PUC complied, in all material respects, with the requirements referred to above that are applicable to each of its major federal programs for the year ended June 30, 2009. However, the results of our auditing procedures disclosed instances of noncompliance with those requirements, which are required to be reported in accordance with OMB Circular A-133 and which are described in the accompanying schedule of findings and questioned costs as Finding 2009-1 and 2009-3.

**REPORT ON COMPLIANCE WITH REQUIREMENTS  
APPLICABLE TO EACH MAJOR PROGRAM  
AND ON INTERNAL CONTROL OVER COMPLIANCE  
IN ACCORDANCE WITH OMB CIRCULAR A-133**

Internal Control Over Compliance

The management of PUC is responsible for establishing and maintaining effective internal control over compliance with requirements of laws, regulations, contracts and grants applicable to federal programs. In planning and performing our audit, we considered PUC's internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance. Accordingly, we do not express an opinion on the effectiveness of PUC's internal control over compliance.

Our consideration of internal control over compliance was for the limited purpose described in the preceding paragraph of this section and would not necessarily identify all deficiencies in PUC's internal control that might be significant deficiencies or material weaknesses as defined below. However, as discussed below, we identified certain deficiencies in internal control over compliance that we consider to be significant deficiencies.

A control deficiency in an entity's internal control over compliance exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect noncompliance with a type of compliance requirement of a federal program on a timely basis. A significant deficiency is a control deficiency or combination of control deficiencies, that adversely affects the entity's ability to administer a federal program such that there is more than a remote likelihood that noncompliance with a type of compliance requirement of a federal program that is more than inconsequential will not be prevented or detected by the entity's internal control. We consider the deficiency in internal control over compliance described in the accompanying schedule of findings and questioned costs as Finding 2009-2 to be a significant deficiency.

A material weakness in a significant deficiency, or combination of significant deficiencies, that results in more than a remote likelihood that material noncompliance with a type of compliance requirement of a federal program will not be prevented or detected by the entity's internal control. However, we believe the significant deficiency described above is not a material weakness.

PUC's responses to the findings identified in our audit are described in the accompanying schedule of findings and questioned costs. We did not audit PUC's responses and, accordingly, we express no opinion on them.

This report is intended for the information and use of management, Los Angeles Unified School District, and federal and state awarding agencies and is not intended to be and should not be used by anyone other than these specified parties.

  
VICENTI, LLOYD & STUTZMAN LLP

December 11, 2009

## REPORT ON STATE COMPLIANCE

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the consolidated financial statements of Partnership to Uplift Communities (PUC) as of and for the year ended June 30, 2009, and have issued our report thereon dated December 11, 2009. Our audit was made in accordance with auditing standards generally accepted in the United States of America, the standards for financial and compliance audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the *2008-09 Standards and Procedures for Audits of California K-12 Local Educational Agencies*, published by the Education Audit Appeals Panel. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

PUC's management is responsible for PUC's compliance with laws and regulations. In connection with the audit referred to above, we selected and tested transactions and records to determine PUC's compliance with the laws and regulations applicable to the following items:

<u>Description</u>	<u>Procedures in Audit Guide</u>	<u>Procedures Performed</u>
Attendance accounting:		
Attendance reporting	8	Not applicable
Independent study	23	Not applicable
Continuation education	10	Not applicable
Adult education	9	Not applicable
Regional occupational center/programs	6	Not applicable
Instructional time:		
School Districts	6	Not applicable
County Offices of Education	3	Not applicable
Community day schools	9	Not applicable
Class size reduction program:		
General requirements	7	Not applicable
Option 1	3	Not applicable
Option 2	4	Not applicable
One school serving K-3	4	Not applicable
Morgan-Hart class size reduction program	7	Not applicable



## REPORT ON STATE COMPLIANCE

<u>Description</u>	<u>Procedures in Controller's Audit Guide</u>	<u>Procedures Performed</u>
State instructional materials fund:		
General requirements	12	Not applicable
Grades K-8 only	1	Not applicable
Grades 9-12 only	1	Not applicable
Ratios of administrative employees to teachers	1	Not applicable
Classroom teacher salaries	1	Not applicable
Early retirement incentive program	4	Not applicable
GANN limit calculation	1	Not applicable
School Accountability Report Card	3	Not applicable
Mathematics and reading professional development	4	Not applicable
After School Education and Safety Program:		
General requirements	4	Not applicable
After school	4	Not applicable
Before school	5	Not applicable
Charter Schools:		
Contemporaneous records of attendance	1	Yes
Mode of instruction	1	Yes
Nonclassroom-based instructional/independent study	15	Not applicable
Determination of funding for nonclassroom-based instruction	3	Not applicable
Annual instructional minutes – classroom based	3	Yes

Based on our audit, we found that, for the items tested, PUC complied with the laws and regulations of the state programs referred to above, except as described in the Schedule of Findings and Questioned Costs. Further, based on our examination, for items not tested, nothing came to our attention to indicate that PUC had not complied with the laws and regulations of state programs and requirements, except as described in the Schedule of Findings and Questioned Costs.

PUC's response to the finding(s) identified in our audit is described in the accompanying schedule of findings and questioned costs. We did not audit PUC's response and, accordingly, we express no opinion on it.

This report is intended solely for the information and use of the Board, management, the Los Angeles Unified School District, the Los Angeles County Office of Education, California Department of Education, and the State Controller's Office and is not intended to be and should not be used by anyone other than these specified parties.

  
 VICENTI, LLOYD & STUTZMAN LLP

December 11, 2009

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**  
**For the Year Ended June 30, 2009**

**Section I - Summary of Auditors' Results**

**Financial Statements**

Type of auditor's report issued December 11, 2009: *Unqualified*

Internal control over financial reporting:

Material weakness(es) identified? *No*

Significant deficiencies identified that are  
not considered to be material weakness(es)? *No*

Noncompliance material to financial statements noted? *No*

**Federal Awards**

Internal control over major programs:

Material weakness(es) identified? *No*

Significant deficiencies identified that are  
not considered to be material weakness(es)? *Yes*

Type of auditor's report issued on compliance for major programs: *Unqualified*

Any audit findings disclosed that are required to be reported  
in accordance with section 510(a) of (Circular A-133)? *Yes*

Identification of major programs:

<u>CFDA Number(s)</u>	<u>Name of Federal Program or Cluster</u>
84.010, 84.389	Title I Cluster
10.555	Child Nutrition Programs
84.394	ARRA: State Fiscal Stabilization Fund

Dollar threshold used to distinguish between type A and type B programs: \$300,000

Auditee qualified as low-risk auditee? *No*

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**  
**For the Year Ended June 30, 2009**

All audit findings must be identified as one or more of the following eleven categories:

<u>Five Digit Code</u>	<u>Finding Types</u>
10000	Attendance
20000	Inventory of Equipment
30000	Internal Control
40000	State Compliance
41000	CalSTRS
50000	Federal Compliance
60000	Miscellaneous
61000	Classroom Teacher Salaries
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

**Finding 2009-1 – Special Tests and Provisions – State Notification of School-Wide Program**      **50000**

**Site:** All Charters

**CFDA Title and Number:** 84.010 – Title I, Part A, Basic

**Federal Award Number and Year:** N/A, 2008-2009

**Name of Federal Agency:** U.S. Department of Education

**Name of the Pass through Agency:** California Department of Education

**Finding:** PUC completed all the necessary procedures to operate a school-wide program and met all the necessary eligibility requirements to operate a school-wide program; however, the School neglected to notify the California Department of Education (CDE).

**Questioned Costs:** Questioned costs have not been quantified because PUC met all required eligibility requirements for operating as a school-wide program except the CDE notification.

**Recommendation:** We recommend PUC notify the CDE regarding its operation of a school-wide program.

**Management Response:** Management concurs with the audit recommendation that as part of the process toward becoming a school wide program, a “Notice of Authorization of School-wide Program” should have been submitted to the California Department of Education. We further concur that each school did in fact meet all necessary eligibility requirements. The “Notice of Authorization” was not submitted due to a clerical oversight.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**  
**For the Year Ended June 30, 2009**

**Finding 2009-2 – Allowable Costs/Principles – Time Certification**

**50000**

**Site:** All Charters

**CFDA Title and Number:** 84.010 – Title I, Part A, Basic

**Federal Award Number and Year:** N/A, 2008-2009

**Name of Federal Agency:** U.S. Department of Education

**Name of the Pass through Agency:** California Department of Education

**Finding:** Federal law requires that salaries charged to federal programs be substantiated by confirmation or determination that costs distributed represent actual costs. Confirmation should be by a responsible person with suitable means of verification that the work was performed.

**Questioned Costs:** Questioned costs have not been quantified because we do not believe there is evidence that employees are being charged inappropriately to the above mentioned program; however, PUC should be aware that if a Federal audit was to occur, funding could be in jeopardy.

**Recommendation:** We recommend PUC implement procedures to ensure employees whose salaries are being charged to federal programs complete semi-annual time certifications.

**Management Response:** Management will complete a semi-annual time certification of employees whose salaries are being charged to federal programs.

**Finding 2009-3 – Cash Management – Federal Interest**

**50000**

**Site:** All Charters

**CFDA Title and Number:** 84.010 – Title I, Part A, Basic

**Federal Award Number and Year:** N/A, 2008-2009

**Name of Federal Agency:** U.S. Department of Education

**Name of the Pass through Agency:** California Department of Education

**Finding:** Interest earned on Federal advances is required to be calculated quarterly and interest over \$100 is to be remitted to the Federal agency in a timely manner. The School did not maintain a record of interest earnings and submit excess earnings to the Federal agency.

**Questioned Costs:** \$850

**Recommendation:** We recommend PUC track all interest earned with federal monies on a quarterly basis and remit any amount exceeding \$100 to the Federal agency timely. Additionally, the above reported questioned costs should be remitted to the California Department of Education immediately.

**Management Response:** Per the audit recommendation, management will maintain a quarterly record of all interest earned with federal monies and remit any amount exceeding \$100.00 to the federal agency. In addition, management will immediately remit the \$850.00 of interest earned for the fiscal year ending June 30, 2009 to the California Department of Education.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**  
**For the Year Ended June 30, 2009**

**Finding 2009-4 – After School Education and Safety Program (ASES)**

**40000**

**Site:** California Academy for Liberal Studies, Community Charter Middle, Lakeview Charter Academy, Milagro Charter and Excel Charter Academy.

**Finding:** The attendance and enrollment data reported to the CDE did not agree to the supporting documentation. PUC hired a third party vendor to administer its ASES program. Even though PUC was relying on this vendor to track and maintain records on attendance, the ultimate responsibility of record keeping for and monitoring of the program lies with the School.

**Questioned Costs:** 4,452 more students served and 95 more days were reported than could be tied to the supporting documentation.

**Recommendation:** We recommend PUC implement procedures to ensure attendance reporting to the CDE is supported with adequate documentation. We also recommend PUC implement procedures to more closely monitor programs administered by third party vendors to ensure all program requirements are being met.

**Management Response:** PUC hired a third party vendor, Youth Policy Institute (YPI), to administer and oversee the ASES program for eligible schools. Per the terms of our agreement, YPI was responsible for accurate attendance and reporting to the California Department of Education. In November 2008, we conducted an internal quality review process of the after school program. We decided to terminate our agreement with YPI because we determined YPI lacked the capacity to administer a quality program and adhere to all administrative and reporting requirements. YPI stopped operating our after school programs in December, 2008. After terminating our agreement with YPI, PUC took all necessary measures to implement procedures to ensure attendance records are accurate and reported in a timely manner. Our inability to provide appropriate back up for attendance records to the auditors was due to Youth Policy Institute's lack of response to our many requests to turn over the attendance records for the time they administered the after school program for PUC during fiscal year 2008-2009.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**SCHEDULE OF PRIOR YEAR FINDINGS AND QUESTIONED COSTS**  
**June 30, 2009**

For the Year Ended June 30, 2008, Partnerships to Uplift Communities had no audit findings.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**  
**AUDITED CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2010**

**PARTNERSHIPS TO UPLIFT COMMUNITIES LOS ANGELES**  
**(A California Non-Profit Public Benefit Corporation)**

**PARTNERSHIPS TO UPLIFT COMMUNITIES VALLEY**  
**(A California Non-Profit Public Benefit Corporation)**

**PARTNERSHIPS TO UPLIFT COMMUNITIES LAKEVIEW TERRACE**  
**(A California Non-Profit Public Benefit Corporation)**

**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**CALS EARLY COLLEGE HIGH SCHOOL**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**EXCEL CHARTER ACADEMY**  
**LAKEVIEW CHARTER ACADEMY**  
**MILAGRO CHARTER SCHOOL**  
**NUEVA ESPERANZA CHARTER ACADEMY**  
**SANTA ROSA CHARTER ACADEMY**  
**TRIUMPH CHARTER ACADEMY**

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### AUDITED CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2010

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# PARTNERSHIPS TO UPLIFT COMMUNITIES

## AUDITED CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2010

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## **INDEPENDENT AUDITORS' REPORT**

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the accompanying consolidated statement of financial position of Partnerships to Uplift Communities (PUC) (a nonprofit organization) as of June 30, 2010 and the related consolidated statements of activities and cash flows for the year then ended. These consolidated financial statements are the responsibility of PUC's management. Our responsibility is to express an opinion on these consolidated financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of PUC as of June 30, 2010, and the changes in its net assets and cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

In accordance with *Government Auditing Standards*, we have also issued our report dated XX, 2010 on our consideration of PUC's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* and should be considered in assessing the results of our audit.

The accompanying schedule of expenditures of federal awards on page 20 is presented for purposes of additional analysis as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. The supplementary schedules on pages 17-19 and pages 21-59 are presented for the purposes of additional analysis. These schedules are not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated, in all material respects, in relation to the basic financial statements taken as a whole. The supplementary section, including the schedule of expenditures of federal awards, is the responsibility of management and was derived from and relate directly to the underlying accounting and other records used to prepare the financial statements.

Board of Directors  
Partnerships to Uplift Communities

The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

VICENTI, LLOYD & STUTZMAN LLP

XX, 2010

**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**CONSOLIDATED STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

	<b>PUC Los Angeles</b>	<b>PUC Valley</b>	<b>PUC Lakeview Terrace</b>	<b>Eliminations</b>	<b>Total</b>
<b><u>ASSETS</u></b>					
<b>CURRENT ASSETS:</b>					
Cash and cash equivalents	\$ -	\$ 905,938	\$ -	\$ -	\$ 905,938
Accounts receivable	2,111,314	567,360	1,960,924	-	4,639,598
Intercompany receivable	-	197,933	-	(197,933)	-
Deposits and prepaid expenses	92,389	29,121	58,261	-	179,771
Other current assets	21,058	2,225	25,774	-	49,057
Total current assets	<u>2,224,761</u>	<u>1,702,577</u>	<u>2,044,959</u>	<u>(197,933)</u>	<u>5,774,364</u>
<b>LONG-TERM ASSETS:</b>					
Intercompany notes receivable	1,594,401	-	-	(1,594,401)	-
Buildings	-	-	3,274,403	-	3,274,403
Leasehold improvements	809,002	223,029	1,066,844	-	2,098,875
Furniture and equipment	831,150	175,936	592,521	-	1,599,607
Less: Accumulated depreciation	<u>(1,139,214)</u>	<u>(122,877)</u>	<u>(604,686)</u>	<u>-</u>	<u>(1,866,777)</u>
Total long-term assets	<u>2,095,339</u>	<u>276,088</u>	<u>4,329,082</u>	<u>(1,594,401)</u>	<u>5,106,108</u>
Total assets	<u>\$ 4,320,100</u>	<u>\$ 1,978,665</u>	<u>\$ 6,374,041</u>	<u>\$ (1,792,334)</u>	<u>\$ 10,880,472</u>
<b><u>LIABILITIES AND NET ASSETS</u></b>					
<b>CURRENT LIABILITIES:</b>					
Accounts payable	\$ 401,114	\$ 105,703	\$ 2,435,110	\$ -	\$ 2,941,927
Accrued payroll and related expenses	976,292	274,089	888,194	-	2,138,575
Intercompany payable	197,836	-	97	(197,933)	-
Current portion of leases payable	29,824	30,740	-	-	60,564
Current portion of loans payable	25,256	50,000	-	-	75,256
Line of credit	<u>236,700</u>	<u>68,400</u>	<u>194,900</u>	<u>-</u>	<u>500,000</u>
Total current liabilities	<u>1,867,022</u>	<u>528,932</u>	<u>3,518,301</u>	<u>(197,933)</u>	<u>5,716,322</u>
<b>LONG-TERM LIABILITIES:</b>					
Intercompany notes payable	-	-	1,594,401	(1,594,401)	-
Long-term portion of leases payable	35,899	45,541	-	-	81,440
Long-term portion of loans payable	-	150,000	-	-	150,000
Security deposits payable	<u>-</u>	<u>-</u>	<u>6,500</u>	<u>-</u>	<u>6,500</u>
Total long-term liabilities	<u>35,899</u>	<u>195,541</u>	<u>1,600,901</u>	<u>(1,594,401)</u>	<u>237,940</u>
Total liabilities	<u>1,902,921</u>	<u>724,473</u>	<u>5,119,202</u>	<u>(1,792,334)</u>	<u>5,954,262</u>
<b>NET ASSETS:</b>					
Unrestricted	2,417,179	1,254,192	1,254,839	-	4,926,210
Total net assets	<u>2,417,179</u>	<u>1,254,192</u>	<u>1,254,839</u>	<u>-</u>	<u>4,926,210</u>
Total liabilities and net assets	<u>\$ 4,320,100</u>	<u>\$ 1,978,665</u>	<u>\$ 6,374,041</u>	<u>\$ (1,792,334)</u>	<u>\$ 10,880,472</u>

The accompanying notes are an integral part of these financial statements.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**CONSOLIDATED STATEMENT OF ACTIVITIES**  
**For The Year Ended June 30, 2010**

	<b>PUC Los Angeles</b>	<b>PUC Valley</b>	<b>PUC Lakeview Terrace</b>	<b>Eliminations</b>	<b>Total</b>
<b><u>REVENUES</u></b>					
State revenue:					
State aid portion of general- purpose block grant	\$ 4,533,329	\$ 1,254,483	\$ 3,984,733	\$ -	\$ 9,772,545
Block grant - categorical	836,324	258,711	606,139	-	1,701,174
Other state revenue	2,315,038	481,773	1,789,904	-	4,586,715
Federal revenue	1,687,696	789,661	1,027,297	-	3,504,654
Local revenue:					
In-lieu property tax revenue	1,647,365	479,341	1,365,691	-	3,492,397
Interest income	6,836	-	22,269	-	29,105
Other revenue	<u>466,651</u>	<u>583,504</u>	<u>2,876,241</u>	<u>(1,648,361)</u>	<u>2,278,035</u>
Total unrestricted revenues	<u>11,493,239</u>	<u>3,847,473</u>	<u>11,672,274</u>	<u>(1,648,361)</u>	<u>25,364,625</u>
<b><u>EXPENSES</u></b>					
Program services:					
Educational programs	12,044,195	3,362,546	9,000,845	-	24,407,586
Support services:					
General and administrative	<u>787,529</u>	<u>261,955</u>	<u>3,865,757</u>	<u>(1,648,361)</u>	<u>3,266,880</u>
Total expenses	<u>12,831,724</u>	<u>3,624,501</u>	<u>12,866,602</u>	<u>(1,648,361)</u>	<u>27,674,466</u>
Change in unrestricted net assets	(1,338,485)	222,972	(1,194,328)	-	(2,309,841)
Beginning unrestricted net assets	<u>3,755,664</u>	<u>1,031,220</u>	<u>2,449,167</u>	<u>-</u>	<u>7,236,051</u>
Ending unrestricted net assets	<u>\$ 2,417,179</u>	<u>\$ 1,254,192</u>	<u>\$ 1,254,839</u>	<u>\$ -</u>	<u>\$ 4,926,210</u>

The accompanying notes are an integral part of these financial statements.

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## CONSOLIDATED STATEMENT OF CASH FLOWS For The Year Ended June 30, 2010

	<u>PUC Los Angeles</u>	<u>PUC Valley</u>	<u>PUC Lakeview Terrace</u>	<u>Total</u>
<b>CASH FLOWS from OPERATING ACTIVITIES:</b>				
Change in Net Assets	\$ (1,338,485)	\$ 222,972	\$ (1,194,328)	\$ (2,309,841)
Adjustments to reconcile change in net assets to net cash provided by (used by) operating activities:				
Depreciation	191,687	36,867	166,847	395,401
(Increase) and decrease in operating assets:				
Accounts receivable	319,851	(106,979)	543,165	756,037
Intercompany receivable	627,149	(197,933)	582,582	1,011,798
Deposits and prepaid expenses	100,081	31,313	211,361	342,755
Other current assets	(15,774)	(1,921)	(10,309)	(28,004)
Increase and (decrease) in operating liabilities:				
Accounts payable	(706,410)	78,312	2,014,194	1,386,096
Accrued payroll and related expenses	464,308	194,487	403,655	1,062,450
Intercompany payable	(52,164)	-	(959,634)	(1,011,798)
Other current liabilities	-	-	(66,491)	(66,491)
Net cash provided by (used by) operating activities	<u>(409,757)</u>	<u>257,118</u>	<u>1,691,042</u>	<u>1,538,403</u>
<b>CASH FLOWS from INVESTING ACTIVITIES:</b>				
Purchase of fixed assets	<u>(709,468)</u>	<u>(43,907)</u>	<u>(1,791,150)</u>	<u>(2,544,525)</u>
Net cash used by investing activities	<u>(709,468)</u>	<u>(43,907)</u>	<u>(1,791,150)</u>	<u>(2,544,525)</u>
<b>CASH FLOWS from FINANCING ACTIVITIES:</b>				
Proceeds from line of credit	236,700	68,400	194,900	500,000
Repayment of lease payable	-	-	(792)	(792)
Repayment of long-term debt	<u>(148,032)</u>	<u>(50,000)</u>	<u>(94,000)</u>	<u>(292,032)</u>
Net cash provided by financing activities	<u>88,668</u>	<u>18,400</u>	<u>100,108</u>	<u>207,176</u>
Net increase (decrease) in cash and cash equivalents	(1,030,557)	231,611	-	(798,946)
Cash and cash equivalents at the beginning of the year	<u>1,030,557</u>	<u>674,327</u>	<u>-</u>	<u>1,704,884</u>
Cash and cash equivalents at the end of the year	<u>\$ -</u>	<u>\$ 905,938</u>	<u>\$ -</u>	<u>\$ 905,938</u>

The accompanying notes are an integral part of these financial statements.

**PARTNERSHIPS TO UPLIFT COMMUNITIES****NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS****June 30, 2010****NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:**

Business Activities – Partnerships to Uplift Communities (PUC) is made up of three tax-exempt nonprofit public-benefit corporations and was originally established in 2003. The corporate structure at PUC and the charter school entities changed in July 1, 2005 at which time the charter schools merged their operations into one corporate entity (PUC) that oversees the operations of the charter schools. In September 2008, the board of directors approved forming two additional corporations, PUC Los Angeles and PUC Valley, and changing the name of the existing corporation to PUC Lakeview Terrace. These three corporations, together with PUC Facilities LLC collectively make up Partnerships to Uplift Communities.

PUC manages ten charter schools authorized by LAUSD under separate charters. The PUC charter schools provide an improved learning facility for underprivileged children. The schools are California Academy for Liberal Studies Middle School and High School, Community Charter Middle School and High School, Excel Charter Academy, Lakeview Charter Academy, Milagro Charter School, Nueva Esperanza Charter Academy, Santa Rosa Charter Academy, and Triumph Charter Academy. Additionally, for the year ended June 30, 2010, the consolidated financial statements include predevelopment activities related to two new schools, Lakeview Charter High School and Triumph Charter High School. These two additional schools are expected to open for the 2010-2011 school year.

PUC corporate offices are located in Burbank, California in the County of Los Angeles. PUC currently operates one elementary school (grades Kindergarten through 5), seven middle schools, and two high schools.

Each of the charter schools under PUC Los Angeles and PUC Lakeview Terrace pays management fees to PUC based on 7% of revenues. Each of the charter schools under PUC Valley pays management fees to PUC based on 8% of revenues. The schools receive most of their support from the Federal and State governments under the authority of the State of California and the Los Angeles Unified School District (LAUSD).

Each charter school, approved by the Board of Education of LAUSD, is independent from the LAUSD in that all decisions, including those regarding management and the use of funds, are made at the charter school level.

Cash – PUC defines cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

## PARTNERSHIPS TO UPLIFT COMMUNITIES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2010

**NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (continued)**

Basis of Accounting – These consolidated financial statements are reported using the current financial resources measurement focus and the accrual basis of accounting. Revenues are recorded when susceptible to accrual, i.e., both measurable and available to finance expenditures of the fiscal period. “Available” means collectible within the current period or soon enough thereafter to pay current liabilities. Application of the “susceptibility to accrual” criteria requires consideration of the materiality of the item in question and due regard for the practicality of accrual, as well as consistency in application.

Consolidation: - These consolidated financial statements include the accounts of three tax exempt nonprofit public benefit corporations (PUC Los Angeles, PUC Valley, and PUC Lakeview Terrace) and PUC Lakeview Terrace’s subsidiary, PUC Facilities, LLC (a single member limited liability company). Collectively, these organizations make up Partnerships to Uplift Communities.

Investments – Earnings from investments are recorded as other local revenues in these consolidated financial statements. Interest income is recognized when earned.

Capital Assets – Capital assets purchased or acquired with an original cost of \$1,000 or more are reported at historical cost or estimated historical cost. Contributed assets are reported at fair market value as of the date received. Additions, improvements, and other capital outlays that significantly extend the useful life of an asset are capitalized. Other costs incurred for repairs and maintenance are expensed as incurred. Depreciation on all assets is provided on the straight-line basis over the various estimated useful lives of the assets which range from three to seven years for equipment, five to fifteen years for leasehold improvements, and thirty-nine years for buildings.

Income Taxes – PUC Los Angeles, PUC Valley, and PUC Lakeview Terrace are nonprofit public-benefit corporations and have been recognized as tax-exempt pursuant to Sec. 501(c)(3) of the Internal Revenue code and 23701d of the California Revenue and Taxation Code. PUC Facilities, LLC is eligible for tax exemption under section 23701h of the California Revenue and Taxation Code. Accordingly, no provision for income taxes has been made.

PUC has evaluated its tax positions and the certainty as to whether those positions will be sustained in the event of an audit by taxing authorities at the federal and state levels. The primary tax positions evaluated are related to PUC’s continued qualification as a tax-exempt organization and whether there is unrelated business income activities conducted that would be taxable. Management has determined that all income tax positions are more likely than not (>50%) of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. PUC files informational returns in the U.S. federal jurisdiction, and the state of California.

**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS****June 30, 2010****NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (continued)**

Use of Estimates – The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Net Assets – Net assets of the organization and changes therein are classified and reported as follows:

Unrestricted net assets – New assets that are not subject to donor-imposed stipulations.

Temporarily restricted net assets – Net assets subject to donor-imposed stipulations that will be met either by actions of the School and/or the passage of time.

Permanently restricted net assets – Net assets subject to donor-imposed stipulations that they be maintained permanently by the School. Generally, the donors of these assets permit the School to use all or part of the income earned on related investments for general or specific purposes.

All contributions are considered to be for unrestricted purposes unless specifically restricted by the donor. All donor-restricted contributions made in the year ended June 30, 2010, whose restrictions have been met in this period, are included in the statement of activities as unrestricted revenue.

Property Taxes – All jurisdictions within California derive their taxing authority from the State Constitution and various legislative provisions contained in the Government code and Revenue and Taxation Code. Property is assessed by the County Assessor and State Board of Equalization at 100% of full cash or market value (with limited exceptions) pursuant to Article XIII A of the California State Constitution and statutory provisions. The property tax levy to support general operations of the various jurisdictions is limited to one percent (1%) of assessed value and is distributed in accordance with statutory formulas. Amounts needed to finance the annual requirements of voter-approved debt are excluded from this limitation and are separately calculated and leveled each fiscal year. The rates are formally adopted by either the County Board of Supervisors or the city council, or in some cases, the government board of a special district.

Property taxes are levied on both real and personal property. Secured property taxes are levied on or before the first business day of September of each year. They become a lien on real property on January 1 preceding the fiscal year for which taxes are leveled. These tax payments can be made in two equal installments, the first is due November 1 and delinquent with penalties after December 10; the second is due February 1 and delinquent with penalties after April 10.

Secured property taxes, which are delinquent and unpaid as of June 30 are declared to be tax defaulted and are subject to redemption penalties, costs, and interest when paid. If the delinquent taxes are not paid at the end of five (5) years, the property is sold at a public auction and the proceeds are used to pay the delinquent amounts due; an excess is remitted, if claimed; to the taxpayer.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2010**

**NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES: (continued)**

Additional tax liens are created when there is a change in ownership of property or upon completion of new construction. Tax bills for these new tax liens are issued throughout the fiscal year and contain various payments and delinquent dates but are generally due within one year. If the new tax liens are lower, the taxpayer receives a tax refund rather than a tax bill. Unsecured personal property taxes are not a lien against the property. These taxes are due on March 1 and become delinquent if unpaid on August 31.

Subsequent Events – All events subsequent to the balance sheet date of June 30, 2010, through XX, 2010, which is the date these financial statements were available to be issued, have been evaluated in accordance with applicable accounting standards.

**NOTE 2 – SUPPLEMENTAL CASH FLOW DISCLOSURES:**

	<b>PUC Los Angeles</b>	<b>PUC Valley</b>	<b>PUC Lakeview Terrace</b>	<b>Total</b>
Cash paid for interest during the year	\$ 17,190	\$ 12,914	\$ 704	\$ 30,808
Non-cash investing and financing activities:				
Purchase of equipment through capital lease	\$ 59,661	\$ 76,281	\$ -	\$ 135,942

**NOTE 3 – CAPITAL ASSETS:**

A summary of changes in capital assets is as follows:

	<b>Beginning Balance 7/1/2009</b>	<b>Additions</b>	<b>Disposals/ Adjustments</b>	<b>Ending Balance 6/30/2010</b>
Work-in-progress:				
PUC Los Angeles				
CA Academy for Liberal Studies	\$ 1,085,351	\$ -	\$ (1,085,351)	\$ -
Subtotal	1,085,351	-	(1,085,351)	-
Buildings:				
PUC Lakeview Terrace				
PUC Home Office	-	3,274,403	-	3,274,403
Subtotal	-	3,274,403	-	3,274,403



**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**
**June 30, 2010**
**NOTE 3 – CAPITAL ASSETS: (continued)**

	<b>Beginning Balance 7/1/2009</b>	<b>Additions</b>	<b>Disposals/ Adjustments</b>	<b>Ending Balance 6/30/2010</b>
Leasehold Improvements:				
PUC Los Angeles				
CA Academy for Liberal Studies	496,633	-	(6,000)	490,633
CALS Early College High School	142,681	-	-	142,681
Excel Charter Academy	104,528	-	-	104,528
Milagro Charter School	68,360	2,800	-	71,160
PUC Valley				
Nueva Esperanza Charter Academy	3,880	-	-	3,880
Triumph Charter Academy	194,249	24,900	-	219,149
PUC Lakeview Terrace				
Community Charter Middle School	82,974	-	-	82,974
Community Charter Early College High School	86,689	-	-	86,689
Lakeview Charter Academy	94,422	-	-	94,422
PUC Home Office	802,759	-	-	802,759
Subtotal	<u>2,077,175</u>	<u>27,700</u>	<u>(6,000)</u>	<u>2,098,875</u>
Furniture and Equipment:				
PUC Los Angeles				
CA Academy for Liberal Studies	237,272	214,724	-	451,996
CALS Early College High School	284,298	-	(14,394)	269,904
Excel Charter Academy	80,063	-	(18,913)	61,150
Milagro Charter School	47,472	628	-	48,100
PUC Valley				
Nueva Esperanza Charter Academy	-	95,288	-	95,288
Triumph Charter Academy	126,344	-	(45,696)	80,648
PUC Lakeview Terrace				
Community Charter Middle School	55,350	-	(1,572)	53,778
Community Charter Early College High School	127,120	-	(2,638)	124,482
Lakeview Charter Academy	87,230	-	(1,572)	85,658
PUC Home Office	268,320	60,283	-	328,603
Subtotal	<u>1,313,469</u>	<u>370,923</u>	<u>(84,785)</u>	<u>1,599,607</u>

**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**
**June 30, 2010**
**NOTE 3 – CAPITAL ASSETS: (continued)**

	<b>Beginning Balance 7/1/2009</b>	<b>Additions</b>	<b>Disposals/ Adjustments</b>	<b>Ending Balance 6/30/2010</b>
Less Accumulated Depreciation:				
PUC Los Angeles				
CA Academy for Liberal Studies	(571,714)	(84,518)	-	(656,232)
CALS Early College High School	(249,666)	(60,194)	-	(309,860)
Milagro Charter School	(77,140)	(21,632)	-	(98,772)
Excel Charter Academy	(49,007)	(25,343)	-	(74,350)
PUC Valley				
Nueva Esperanza Charter Academy	-	(13,366)	-	(13,366)
Triumph Charter Academy	(86,010)	(23,501)	-	(109,511)
PUC Lakeview Terrace				
Community Charter Middle School	(56,277)	(12,569)	-	(68,846)
High School	(106,985)	(25,891)	-	(132,876)
Lakeview Charter Academy	(111,729)	(20,430)	-	(132,159)
PUC Home Office	(162,848)	(107,957)	-	(270,805)
Subtotal	<u>(1,471,376)</u>	<u>(395,401)</u>	<u>-</u>	<u>(1,866,777)</u>
Net Capital Assets	<u>\$ 3,004,619</u>	<u>\$ 3,222</u>	<u>\$(1,176,136)</u>	<u>\$ 5,106,108</u>

**NOTE 4 – RETIREMENT PLAN:**

Qualified employees are covered under a multiple-employer defined benefit pension plan maintained by the State of California. Certificated employees are members of the State Teachers' Retirement System (STRS).

**State Teachers' Retirement System (STRS)**

The Teachers' Retirement Fund (TRF) is a defined benefit pension plan under the STRS. At June 30, 2010, there were approximately 1,200 contributing employers (school districts, community college districts, county offices of education and regional occupational programs). The State of California is a non-employer contributor to the TRF.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**
**June 30, 2010**
**NOTE 4 – RETIREMENT PLAN: (continued)**
**Plan Description**

The Academy contributes to the State Teachers' Retirement System (STRS), a cost-sharing multiple-employer public employee retirement system defined benefit pension plan administered by STRS. The plan provides retirement, disability and survivor benefits to beneficiaries. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law. STRS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. Copies of the STRS annual financial report may be obtained from STRS, 7667 Folsom Boulevard, Sacramento, CA 95826.

**Funding Policy**

Active plan members are required to contribute 8.0% of their salary and the Academy is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the STRS Teachers' Retirement Board. The required employer contribution rate for fiscal year 2009-10 was 8.25% of annual payroll. The contribution requirements of the plan members are established and may be amended by State statute.

Qualified employees of PUC are covered under a multiple-employer defined benefit requirement plan maintained by an agency of the State of California. The retirement plan is the State Teachers' Retirement System (STRS).

**Contributions to STRS**

PUC's contributions to STRS for each of the last three fiscal years are as follows:

Year Ended <u>June 30,</u>	<u>STRS</u>	
	<u>Required Contribution</u>	<u>Percent Contributed</u>
2008	\$575,680	100%
2009	\$711,062	100%
2010	\$864,598	100%

**NOTE 5 – DONATED SERVICES:**

No amounts have been reflected in the consolidated financial statements for donated services since no objective basis is available to measure the value of the services. However, some volunteers have donated their time to the PUC schools.

**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**  
**June 30, 2010**

**NOTE 6 – CONCENTRATIONS OF CREDIT RISK:**

PUC maintains some of its cash balances in the Los Angeles County treasury. The balances held with the County treasury are insured. PUC also maintains various bank accounts with commercial institutions. At June 30, 2010, the balances in these institutions were insured by the FDIC up to \$250,000, and the balances, at times, exceeded the insured amount. At June 30, 2010, PUC's uninsured cash balances totaled \$455,354.

**NOTE 7 – OPERATING LEASES:**

PUC leases its facilities and certain equipment under various operating lease agreements. Current year lease expense under these leases was \$XX. Future minimum commitments under operating leases are as follows:

	2011	2012	2013	2014	2015	Thereafter	Total
PUC Los Angeles							
CALSMS/STR	\$ 246,000	\$ 253,380	\$ 260,981	\$ 268,811	\$ 276,875	\$4,942,842	\$ 6,248,889
CALS HS	508,424	84,737				-	593,161
Milagro/Excel	535,906	554,664	574,088	594,184	614,972	743,180	3,616,994
PUC Valley							
Triumph Charter HS	6,895	-	-	-	-	-	6,895
PUC Lakeview Terrace							
CCMS/CCHS/Lakeview	769,397	801,721	872,076	959,284	1,055,212	1,357,165	5,814,855
PUC Home Office	120,093	20,142	-	-	-	-	140,235
Total	<u>\$2,186,715</u>	<u>\$1,714,644</u>	<u>\$1,707,145</u>	<u>\$1,822,279</u>	<u>\$1,947,059</u>	<u>\$7,043,187</u>	<u>\$16,421,029</u>

**NOTE 8 – CAPITAL LEASES:**

PUC leases copiers and computers under various capital lease agreements. Total future commitments under capital leases are as follows:

	2011	2012	2013	Total
PUC Los Angeles				
CALSMS	\$ 27,980	\$ 30,544	\$ 5,355	\$ 63,879
CALS HS	1,844	-	-	1,844
PUC Valley				
NEC	<u>30,740</u>	<u>33,638</u>	<u>11,903</u>	<u>76,281</u>
Total	<u>\$ 60,564</u>	<u>\$ 64,182</u>	<u>\$ 17,258</u>	<u>\$ 142,004</u>

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2010

#### **NOTE 9 – LOANS PAYABLE:**

In August 2008, PUC received a \$533,976 loan from the California Charter School Association. The loan bears a 6.25% interest rate and requires repayment in three installments. The final installment of \$25,256 is due in the next fiscal year.

In November 2008, Triumph Charter Academy received a revolving loan from the California Department of Education (CDE) in the amount of \$250,000. The loan bears a 2.63% interest rate and requires repayment in five annual installments.

Future commitments under these two loans payable are as follows:

	2011	2012	2013	2014	Total
PUC Los Angeles					
CALSMS	\$ 25,256	\$ -	\$ -	\$ -	\$ 25,256
PUC Valley					
TRI	<u>50,000</u>	<u>50,000</u>	<u>50,000</u>	<u>50,000</u>	<u>200,000</u>
Total	<u>\$ 75,256</u>	<u>\$ 50,000</u>	<u>\$ 50,000</u>	<u>\$ 50,000</u>	<u>\$ 225,256</u>

#### **NOTE 10 – LOSS CONTINGENCY:**

PUC is currently in the process of settling a claim regarding Lakeview Charter Academy. The estimated loss of \$66,491 has been accrued as of June 30, 2010 and is included in other accrued liabilities in the consolidated statement of financial position.

#### **NOTE 11 – LINE OF CREDIT:**

PUC has a line of credit with NCB for \$500,000 at 3.875% interest rate. As of June 30, 2010 the outstanding loan balance was \$500,000.

#### **NOTE 12 – SUBSEQUENT EVENTS:**

In August 2010, PUC signed an agreement to sell \$1,110,000 of receivables at a discounted rate.

In July 2010, PUC Facilities LLC obtained two loans from Low Income Investment Fund (LIIF) to purchase one of the school sites in Los Angeles. The first loan is for \$5,920,000 at 7.58% annually for 7 years. The second loan is an interest only loan in the amount of \$250,000 at 5% annually for 10 years. PUC Lakeview Terrace is the sole member of PUC Facilities LLC. PUC Los Angeles, PUC Valley and PUC Lakeview Terrace, collectively, are the guarantors for repayment of the first and second loan.

Following the purchase, PUC Lakeview Terrace entered into a 25-year lease agreement with PUC Facilities LLC.

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

June 30, 2010

#### **NOTE 12 – SUBSEQUENT EVENTS: (continued)**

Future commitments under these two loans payable are as follows:

<u>For the Year</u> <u>Ending June 30,</u>	<u>PUC</u> <u>Facilities LLC</u>
2011	\$ 634,054
2012	739,346
2013	795,416
2014	855,886
2015	921,102
Thereafter	<u>2,224,196</u>
Total	<u>\$ 6,170,000</u>



## **SUPPLEMENTARY INFORMATION SECTION**

## PARTNERSHIPS TO UPLIFT COMMUNITIES

### HISTORY AND ORGANIZATION For the Year Ended June 30, 2010

Partnerships to Uplift Communities (PUC) is made up of three tax-exempt nonprofit public-benefit corporations and was originally established in 2003. PUC manages the following ten charter schools authorized by the LAUSD under separate charters:

- Community Charter Middle School (CCMS) – Established: 1999 – Charter Number: 0213
- California Academy for Liberal Studies (CALSMS) – Established: 2000 – Charter Number: 0331
- Lakeview Charter Academy (LAKEVIEW) – Established: 2003 – Charter Number: 0603
- Milagro Charter School (MILAGRO) – Established: 2003 – Charter Number: 0600
- Community Charter Early College High School (CCHS) – Established: 2005 – Charter Number: 0733
- CALS Early College High School (CALSHS) – Established: 2005 – Charter Number: 0710
- Excel Charter Academy (EXCEL) – Established: 2006 – Charter Number: 0798
- Triumph Charter Academy (TRIUMPH) – Established: 2006 – Charter Number: 0797
- Nueva Esperanza Charter Academy (NEC) – Established: 2009 – Charter Number: 1092
- Santa Rosa Charter Academy (STR) – Established: 2009 – Charter Number: 1091

#### Board of Trustees

<u>Name</u>	<u>Office</u>	<u>Term Expires</u>
John Biroc	Chair	June 2012
Jacqueline Elliot	Secretary of PUC LVT and PUC Valley	June 2011
Ed Palmer	Secretary of PUC LVT and Treasurer of PUC LA	June 2011
Ref Rodriguez	Treasurer of PUC LVT and PUC Valley	June 2011
Jeanne Adams	Board Member	June 2011

#### Administration

Jacqueline Elliot	CEO
Kennedy Hilario	Managing Director
Kelly Montes De Oca	Chief Academic Officer
Malena Otero	Director of Human Resources
Jacqueline Duvivier Castillo	Director of Business and Development
Christine Sartiaguda	Director of Clinical Services
Edward Vandenberg	Regional Director, Valley Schools
Nik Orlando	Regional Director, LA Schools

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## SCHEDULE OF INSTRUCTIONAL MINUTES For the Year Ended June 30, 2010

Charter School	Grade Level	2009-10 Minutes			Status
		Requirement	Reduced	Actual	
Milagro Charter School	Kindergarten	36,000	34,971	59,690	In compliance
	Grade 1	50,400	48,960	57,170	In compliance
	Grade 2	50,400	48,960	57,170	In compliance
	Grade 3	50,400	48,960	57,170	In compliance
	Grade 4	54,000	48,960	57,170	In compliance
	Grade 5	54,000	48,960	57,170	In compliance
Nueva Esperanza Charter Academy	Grade 6	54,000	48,960	66,350	In compliance
Santa Rosa Charter Academy	Grade 6	54,000	48,960	64,180	In compliance
Lakeview Charter Academy Middle School	Grade 6	54,000	48,960	69,520	In compliance
	Grade 7	54,000	48,960	59,840	In compliance
Community Charter Middle School	Grade 6	54,000	48,960	59,195	In compliance
	Grade 7	54,000	48,960	59,195	In compliance
	Grade 8	54,000	48,960	59,195	In compliance
Excel Charter Academy	Grade 6	54,000	48,960	56,263	In compliance
	Grade 7	54,000	48,960	56,263	In compliance
	Grade 8	54,000	48,960	56,263	In compliance
California Academy for Liberal Studies	Grade 6	54,000	48,960	58,600	In compliance
	Grade 7	54,000	48,960	58,600	In compliance
	Grade 8	54,000	48,960	58,600	In compliance
Triumph Charter Academy	Grade 6	54,000	48,960	63,225	In compliance
	Grade 7	54,000	48,960	63,225	In compliance
	Grade 8	54,000	48,960	63,225	In compliance
Community Charter Early College High School	Grade 9	64,800	62,949	64,895	In compliance
	Grade 10	64,800	62,949	64,895	In compliance
	Grade 11	64,800	62,949	64,895	In compliance
	Grade 12	64,800	62,949	64,895	In compliance
CALS Early College High School	Grade 9	64,800	62,949	68,735	In compliance
	Grade 10	64,800	62,949	68,735	In compliance
	Grade 11	64,800	62,949	68,735	In compliance
	Grade 12	64,800	62,949	68,735	In compliance

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**SCHEDULE OF AVERAGE DAILY ATTENDANCE (ADA)  
 For the Year Ended June 30, 2010**

Charter School	Grade Levels	Second Period Report		Annual Report	
		Classroom Based	Total	Classroom Based	Total
Milagro Charter School	Kindergarten	43.08	43.08	42.98	42.98
	Grades 1 through 3	126.90	126.90	126.77	126.77
	Grades 4 through 6	84.62	84.62	84.56	84.56
	ADA Totals	254.60	254.60	254.31	254.31
Nueva Esperanza Charter Academy	Grades 4 through 6	104.91	104.91	104.61	104.61
	ADA Totals	104.91	104.91	104.61	104.61
Santa Rosa Charter Academy	Grades 4 through 6	96.98	96.98	95.68	95.68
	ADA Totals	96.98	96.98	95.68	95.68
Community Charter Middle School	Grades 4 through 6	106.21	106.21	105.84	105.84
	Grades 7 through 8	198.59	198.59	197.99	197.99
	ADA Totals	304.80	304.80	303.83	303.83
Lakeview Charter Academy	Grades 4 through 6	105.96	105.96	105.32	105.32
	Grades 7 through 8	195.55	195.55	194.65	194.65
	ADA Totals	301.51	301.51	299.97	299.97
Excel Charter Academy	Grades 4 through 6	107.08	107.08	106.49	106.49
	Grades 7 through 8	186.78	186.78	185.11	185.11
	ADA Totals	293.86	293.86	291.60	291.60
Triumph Charter Academy	Grades 4 through 6	109.41	109.41	109.16	109.16
	Grades 7 through 8	139.56	139.56	138.53	138.53
	ADA Totals	248.97	248.97	247.69	247.69
California Academy for Liberal Studies	Grades 4 through 6	100.38	100.38	99.86	99.86
	Grades 7 through 8	181.00	181.00	180.23	180.23
	ADA Totals	281.38	281.38	280.09	280.09

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**
**SCHEDULE OF AVERAGE DAILY ATTENDANCE (ADA) (continued)**  
**For the Year Ended June 30, 2010**

<u>Charter School</u>	<u>Grade Levels</u>	<u>Second Period Report</u>		<u>Annual Report</u>	
		<u>Classroom</u> <u>Based</u>	<u>Total</u>	<u>Classroom</u> <u>Based</u>	<u>Total</u>
Community Charter Early College HS	Grades 9 through 12	<u>401.93</u>	<u>401.93</u>	<u>397.80</u>	<u>397.80</u>
	ADA Totals	<u>401.93</u>	<u>401.93</u>	<u>397.80</u>	<u>397.80</u>
CALS Early College High School	Grades 9 through 12	<u>289.37</u>	<u>289.37</u>	<u>285.63</u>	<u>285.63</u>
	ADA Totals	<u>289.37</u>	<u>289.37</u>	<u>285.63</u>	<u>285.63</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**SCHEDULE OF FEDERAL EXPENDITURES**  
**For the Year Ended June 30, 2010**

<b>Federal Grantor/Pass-Through Grantor/Program or Cluster Title</b>	<b>Federal CFDA Number</b>	<b>Pass- Through Entity Identifying Number</b>	<b>PUC Los Angeles</b>	<b>PUC Valley</b>	<b>PUC Lakeview Terrace</b>	<b>Total Federal Expenditures</b>
<b>U.S. Department of Education</b>						
Pass Through the California Department of Education:						
No Child Left Behind Act and American						
Recovery and Reinvestment Act:						
Title I Part A Cluster:						
Title I, Part A, Basic	84.010	14329	\$ 698,062	\$ 206,203	\$ 482,734	\$ 1,386,999
ARRA: Title I, Part A, Basic	84.389	15005	<u>195,082</u>	<u>59,028</u>	<u>136,233</u>	<u>390,343</u>
Subtotal: Title I Part A Cluster			893,144	265,231	618,967	1,777,342
Title II, Part A, Improving Teacher Quality	84.367	14341	26,582	8,334	27,670	62,586
Title III, Part A, Limited English Proficiency	84.365	10084	19,600	7,600	18,600	45,800
Title I, Part D Dept of Corrections, Adult Neglected and Delinquent	84.013	14324	795	-	2,263	3,058
ARRA: State Fiscal Stabilization Fund	84.394	25008	386,038	98,406	316,655	801,099
Title V, Part B, Implementation	84.282A	14959	450,000	450,000	-	900,000
Readiness & Emergency Management	84.184E	N/A	-	-	238,550	238,550
Charter School Facilities Incentive	84.282D	N/A	<u>272,250</u>	<u>-</u>	<u>27,000</u>	<u>299,250</u>
Subtotal: Pass-Through Programs			<u>2,048,409</u>	<u>829,571</u>	<u>1,249,705</u>	<u>4,127,685</u>
<i>Total U.S. Department of Education</i>			<u>2,048,409</u>	<u>829,571</u>	<u>1,249,705</u>	<u>4,127,685</u>
<b>U.S. Department of Agriculture</b>						
Pass Through the California Department of Education						
Child Nutrition Programs	10.555	13391	<u>351,773</u>	<u>152,853</u>	<u>305,456</u>	<u>810,082</u>
<i>Total U.S. Department of Agriculture</i>			<u>351,773</u>	<u>152,853</u>	<u>305,456</u>	<u>810,082</u>
<b>Total Expenditures for Federal Awards</b>			<u>\$ 2,400,182</u>	<u>\$ 982,424</u>	<u>\$ 1,555,161</u>	<u>\$ 4,937,767</u>
<b>Reconciliation to Federal Revenues</b>						
Total Federal Program Expenditures			\$ 2,400,182	\$ 982,424	\$ 1,555,161	\$ 4,937,767
<b>Expenditures in excess of revenues related to Federal programs:</b>						
Title I, Part A, Basic	84.010	14329	(253,548)	(63,831)	(178,088)	(495,467)
ARRA: Title I, Part A, Basic	84.389	15005	(110,777)	(37,726)	(70,904)	(219,407)
ARRA: State Fiscal Stabilization Fund	84.394	25008	<u>(348,161)</u>	<u>(91,206)</u>	<u>(278,872)</u>	<u>(718,239)</u>
Total Federal Program Revenue			<u>\$ 1,687,696</u>	<u>\$ 789,661</u>	<u>\$ 1,027,297</u>	<u>\$ 3,504,654</u>

N/A – Not available.

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ -
Accounts receivable	498,675
Deposits and prepaid expenses	22,768
Other current assets	4,373
Total current assets	<u>525,816</u>

**LONG-TERM ASSETS:**

Intercompany note receivable	1,594,401
Leasehold improvements	490,633
Furniture and equipment	451,996
Less: Accumulated depreciation	<u>(656,232)</u>
Total long-term assets	<u>1,880,798</u>
Total assets	<u>\$ 2,406,614</u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 80,481
Accrued payroll and related expenses	206,438
Intercompany payable	775,984
Current portion of lease payable	27,980
Current portion of loan payable	25,256
Line of credit	53,700
Total current liabilities	<u>1,169,839</u>

**LONG-TERM LIABILITIES:**

Long term portion of lease payable	<u>35,899</u>
Total long-term liabilities	<u>35,899</u>
Total liabilities	<u>1,205,738</u>

**NET ASSETS:**

Unrestricted	<u>1,200,876</u>
Total net assets	<u>1,200,876</u>
Total liabilities and net assets	<u>\$ 2,406,614</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,003,641
Block grant - categorical	191,386
Other state revenue	535,988
Federal revenue	211,934
Local revenue:	
In-lieu property tax revenue	381,138
Interest income	6,836
Other revenue	<u>188,887</u>
Total unrestricted revenues	<u>2,519,810</u>

**EXPENSES:**

Program services:	
Educational programs	2,873,705
Support services:	
General and administrative	<u>172,342</u>
Total expenses	<u>3,046,047</u>
Change in unrestricted net assets	(526,237)
Beginning unrestricted net assets	<u>1,727,113</u>
Ending unrestricted net assets	<u><u>\$ 1,200,876</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (526,237)
Adjustments to reconcile change in net assets to net cash used by operating activities:	
Depreciation	84,518
Increase in operating assets:	
Accounts receivable	(72,624)
Deposits and prepaid expenses	(3,243)
Other current assets	(4,373)
Increase and (decrease) in operating liabilities:	
Accounts payable	(779,584)
Accrued payroll and related expenses	102,862
Intercompany payable	525,984
Net cash used by operating activities	<u>(672,697)</u>

**CASH FLOWS from INVESTING ACTIVITIES:**

Purchase of fixed assets	<u>(692,787)</u>
Net cash used by investing activities	<u>(692,787)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Proceeds from line of credit	53,700
Proceeds from loan payable	<u>4,456</u>
Net cash provided by financing activities	<u>58,156</u>
Net decrease in cash and cash equivalents	(1,307,328)
Cash and cash equivalents at the beginning of the year	<u>1,307,328</u>
Cash and cash equivalents at the end of the year	<u>\$ -</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 14,166</u>
Non cash investing and financing activities:	
Acquisition of equipments through capital lease	<u>\$ 63,879</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 1,325,187
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(89,150)
Accounts receivable	10,020
Prepaid expenses	(15,385)
Other current assets	(105,540)
Loan receivable	1,594,401
Work in progress	(1,804,963)
Furniture and equipment	247,616
Accumulated depreciation	25,609
Accounts payable	(187,079)
Intercompany payable	(775,984)
Lease payable	(63,879)
Line of credit	(53,700)
Loan payable	<u>1,093,723</u>
Net Adjustments and Reclassifications	<u>(124,311)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 1,200,876</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS****CURRENT ASSETS:**

Cash and cash equivalents	\$ 545,955
Accounts receivable	436,861
Deposits and prepaid expenses	19,334
Other current assets	6,549
Total current assets	<u>1,008,699</u>

**LONG-TERM ASSETS:**

Leasehold improvements	142,681
Furniture and equipment	269,904
Less: Accumulated depreciation	<u>(309,860)</u>
Total long-term assets	<u>102,725</u>
Total assets	<u>\$ 1,111,424</u>

**LIABILITIES AND NET ASSETS****CURRENT LIABILITIES:**

Accounts payable	\$ 84,713
Accrued payroll and related expenses	220,998
Current portion of leases payable	1,844
Line of credit	<u>57,750</u>
Total current liabilities	<u>365,305</u>

**NET ASSETS:**

Unrestricted	<u>746,119</u>
Total net assets	<u>746,119</u>
Total liabilities and net assets	<u>\$ 1,111,424</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,277,704
Block grant - categorical	190,224
Other state revenue	416,626
Federal revenue	383,243
Local revenue:	
In-lieu property tax revenue	391,960
Other revenue	<u>59,047</u>
Total unrestricted revenues	<u>2,718,804</u>

**EXPENSES:**

Program services:	
Educational programs	2,895,999
Support services:	
General and administrative	<u>188,673</u>
Total expenses	<u>3,084,672</u>
Change in unrestricted net assets	(365,868)
Beginning unrestricted net assets	<u>1,111,987</u>
Ending unrestricted net assets	<u>\$ 746,119</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (365,868)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	60,194
(Increase) and decrease in operating assets:	
Accounts receivable	340,748
Deposits and prepaid expenses	47,707
Other current assets	(1,265)
Increase and (decrease) in operating liabilities:	
Accounts payable	17,527
Accrued payroll and related expenses	91,624
Other current liabilities	(2,317)
Net cash provided by operating activities	<u>188,350</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(28,800)
Proceeds from line of credit	57,750
Repayment of leases payable	(1,901)
Net cash provided by financing activities	<u>27,049</u>

Net increase in cash and cash equivalents	215,399
Cash and cash equivalents at the beginning of the year	<u>330,556</u>
Cash and cash equivalents at the end of the year	<u><u>\$ 545,955</u></u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 1,979</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**CALIFORNIA ACADEMY FOR LIBERAL STUDIES**  
**EARLY COLLEGE HIGH SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 934,424
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(23,935)
Accounts receivable	11,162
Prepaid expenses	(12,565)
Other current assets	(5,185)
Accumulated depreciation	(9,603)
Accounts payable	<u>(148,179)</u>
Net Adjustments and Reclassifications	<u>(188,305)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 746,119</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE  
 COMMUNITY CHARTER MIDDLE SCHOOL  
 SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION  
 June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 1,276,006
Accounts receivable	454,046
Deposits and prepaid expenses	2,948
Other current assets	<u>3,053</u>
Total current assets	<u>1,736,053</u>

**LONG-TERM ASSETS:**

Leasehold improvements	82,974
Furniture and equipment	53,778
Less: Accumulated depreciation	<u>(68,846)</u>
Total long-term assets	<u>67,906</u>
Total assets	<u><u>\$ 1,803,959</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 63,676
Accrued payroll and related expenses	229,724
Line of credit	<u>59,400</u>
Total current liabilities	<u>352,800</u>

**NET ASSETS:**

Unrestricted	<u>1,451,159</u>
Total net assets	<u>1,451,159</u>
Total liabilities and net assets	<u><u>\$ 1,803,959</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,094,275
Block grant - categorical	192,116
Other state revenue	590,504
Federal revenue	249,497
Local revenue:	
In-lieu property tax revenue	412,861
Interest income	13,065
Other revenue	<u>86,503</u>
Total unrestricted revenues	<u>2,638,821</u>

**EXPENSES:**

Program services:	
Educational programs	2,681,572
Support services:	
General and administrative	<u>205,182</u>
Total expenses	<u>2,886,754</u>
Change in unrestricted net assets	(247,933)
Beginning unrestricted net assets	<u>1,699,092</u>
Ending unrestricted net assets	<u>\$ 1,451,159</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER MIDDLE SCHOOL**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (247,933)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	12,569
(Increase) and decrease in operating assets:	
Accounts receivable	31,406
Intercompany accounts receivable	332,582
Deposits and prepaid expenses	28,900
Other current assets	(823)
Increase and (decrease) in operating liabilities:	
Accounts payable	(34,873)
Accrued payroll and related expenses	130,606
Other current liabilities	(317)
Net cash provided by operating activities	<u>252,117</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Proceeds from line of credit	<u>59,400</u>
Net cash provided by financing activities	<u>59,400</u>
Net increase in cash and cash equivalents	311,517
Cash and cash equivalents at the beginning of the year	<u>964,489</u>
Cash and cash equivalents at the end of the year	<u><u>\$ 1,276,006</u></u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 481</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE  
 COMMUNITY CHARTER MIDDLE SCHOOL  
 RECONCILIATION OF ANNUAL FINANCIAL REPORT  
 WITH AUDITED FINANCIAL STATEMENTS  
 For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 1,632,443
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	35,547
Accounts receivable	1,009
Prepaid expenses	2,948
Other current assets	(12,815)
Accounts payable	<u>(207,973)</u>
Net Adjustments and Reclassifications	<u>(181,284)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ 1,451,159</u></u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ -
Accounts receivable	755,909
Deposits and prepaid expenses	3,143
Other current assets	7,986
Total current assets	<u>767,038</u>

**LONG-TERM ASSETS:**

Leasehold improvements	86,689
Furniture and equipment	124,482
Less: Accumulated depreciation	<u>(132,876)</u>
Total long-term assets	<u>78,295</u>
Total assets	<u><u>\$ 845,333</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 85,193
Accrued payroll and related expenses	315,880
Intercompany accounts payable	629,997
Line of credit	77,000
Total current liabilities	<u>1,108,070</u>

**NET ASSETS:**

Unrestricted	<u>(262,737)</u>
Total net assets	<u>(262,737)</u>
Total liabilities and net assets	<u><u>\$ 845,333</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,802,086
Block grant - categorical	241,581
Other state revenue	635,957
Federal revenue	286,911
Local revenue:	
In-lieu property tax revenue	544,426
Other revenue	<u>70,348</u>
Total unrestricted revenues	<u>3,581,309</u>

**EXPENSES:**

Program services:	
Educational programs	3,706,013
Support services:	
General and administrative	<u>281,805</u>
Total expenses	<u>3,987,818</u>
Change in unrestricted net assets	(406,509)
Beginning unrestricted net assets	<u>143,772</u>
Ending unrestricted net assets	<u>\$ (262,737)</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (406,509)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	25,891
(Increase) and decrease in operating assets:	
Accounts receivable	161,223
Deposits and prepaid expenses	40,990
Other current assets	(677)
Increase and (decrease) in operating liabilities:	
Accounts payable	2,778
Accrued payroll and related expenses	128,490
Intercompany payable	64,814
Net cash provided by operating activities	<u>17,000</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(94,000)
Proceeds from line of credit	<u>77,000</u>
Net cash used by financing activities	<u>(17,000)</u>

Net decrease in cash and cash equivalents	-
Cash and cash equivalents at the beginning of the year	<u>-</u>
Cash and cash equivalents at the end of the year	<u>\$ -</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 2,158</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**COMMUNITY CHARTER EARLY COLLEGE HIGH SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ (9,065)
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(5,671)
Accounts receivable	15,007
Prepaid expenses	3,143
Other current assets	(18,408)
Accumulated depreciation	8,011
Accounts payable	374,243
Intercompany payable	<u>(629,997)</u>
Net Adjustments and Reclassifications	<u>(253,672)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ (262,737)</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES  
 EXCEL CHARTER ACADEMY  
 SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION  
 June 30, 2010**

**ASSETS****CURRENT ASSETS:**

Cash and cash equivalents	\$ -
Accounts receivable	493,025
Deposits and prepaid expenses	794
Other current assets	8,606
Total current assets	<u>502,425</u>

**LONG-TERM ASSETS:**

Leasehold improvements	104,528
Furniture and equipment	61,150
Less: Accumulated depreciation	<u>(74,350)</u>
Total long-term assets	<u>91,328</u>
Total assets	<u>\$ 593,753</u>

**LIABILITIES AND NET ASSETS****CURRENT LIABILITIES:**

Accounts payable	\$ 101,939
Accrued payroll and related expenses	253,996
Intercompany payable	152,207
Line of credit	<u>57,550</u>
Total current liabilities	<u>565,692</u>

**NET ASSETS:**

Unrestricted	<u>28,061</u>
Total net assets	<u>28,061</u>
Total liabilities and net assets	<u>\$ 593,753</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**EXCEL CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,021,330
Block grant - categorical	236,920
Other state revenue	614,032
Federal revenue	352,164
Local revenue:	
In-lieu property tax revenue	398,042
Other revenue	<u>92,571</u>
Total unrestricted revenues	<u>2,715,059</u>

**EXPENSES:**

Program services:	
Educational programs	2,886,727
Support services:	
General and administrative	<u>184,922</u>
Total expenses	<u>3,071,649</u>
Change in unrestricted net assets	(356,590)
Beginning unrestricted net assets	<u>384,651</u>
Ending unrestricted net assets	<u>\$ 28,061</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**EXCEL CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (356,590)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	25,343
(Increase) and decrease in operating assets:	
Accounts receivable	146,765
Deposits and prepaid expenses	35,336
Other current assets	(8,606)
Increase in operating liabilities:	
Accounts payable	17,168
Accrued payroll and related expenses	141,214
Intercompany payable	22,971
Net cash provided by operating activities	<u>23,601</u>

**CASH FLOWS from INVESTING ACTIVITIES:**

Purchase of fixed assets	<u>(7,463)</u>
Net cash used by investing activities	<u>(7,463)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(73,688)
Proceeds from line of credit	<u>57,550</u>
Net cash used by financing activities	<u>(16,138)</u>

Net decrease in cash and cash equivalents	-
Cash and cash equivalents at the beginning of the year	<u>-</u>
Cash and cash equivalents at the end of the year	<u>\$ -</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 1,662</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**EXCEL CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 241,516
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(30,038)
Accounts receivable	17,547
Prepaid expenses	794
Other current assets	(6,294)
Accounts payable	(43,257)
Intercompany payable	<u>(152,207)</u>
Net Adjustments and Reclassifications	<u>(213,455)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ 28,061</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**LAKEVIEW CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ -
Accounts receivable	458,257
Deposits and prepaid expenses	829
Other current assets	<u>12,486</u>
Total current assets	<u>471,572</u>

**LONG-TERM ASSETS:**

Leasehold improvements	94,422
Furniture and equipment	85,658
Less: Accumulated depreciation	<u>(132,159)</u>
Total long-term assets	<u>47,921</u>
Total assets	<u>\$ 519,493</u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	148,511
Accrued payroll and related expenses	211,418
Intercompany payable	458,710
Line of credit	<u>58,500</u>
Total current liabilities	<u>877,139</u>

**NET ASSETS:**

Unrestricted	<u>(357,646)</u>
Total net assets	<u>(357,646)</u>
Total liabilities and net assets	<u>\$ 519,493</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**LAKEVIEW CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 1,088,372
Block grant - categorical	172,442
Other state revenue	545,510
Federal revenue	252,339
Local revenue:	
In-lieu property tax revenue	408,404
Other revenue	<u>76,548</u>
Total unrestricted revenues	<u>2,543,615</u>

**EXPENSES:**

Program services:	
Educational programs	2,613,260
Support services:	
General and administrative	<u>199,032</u>
Total expenses	<u>2,812,292</u>
Change in unrestricted net assets	(268,677)
Beginning unrestricted net assets	<u>(88,969)</u>
Ending unrestricted net assets	<u>\$ (357,646)</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**LAKEVIEW CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (268,677)
Adjustments to reconcile change in net assets to net cash used by operating activities:	
Depreciation	20,430
(Increase) and decrease in operating assets:	
Accounts receivable	(44,318)
Deposits and prepaid expenses	32,901
Other current assets	(11,164)
Increase and (decrease) in operating liabilities:	
Accounts payable	63,956
Accrued payroll and related expenses	141,390
Intercompany payable	73,866
Other current liabilities	(66,491)
Net cash used by operating activities	<u>(58,107)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(393)
Proceeds from line of credit	<u>58,500</u>
Net cash provided by financing activities	<u>58,107</u>
Net increase (decrease) in cash and cash equivalents	-
Cash and cash equivalents at the beginning of the year	<u>-</u>
Cash and cash equivalents at the end of the year	<u><u>\$ -</u></u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 897</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LAKEVIEW TERRACE**  
**LAKEVIEW CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ (187,834)
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(20,860)
Accounts receivable	17,203
Prepaid expenses	829
Other current assets	(2,697)
Accumulated depreciation	(2,584)
Accounts payable	297,007
Intercompany payable	<u>(458,710)</u>
Net Adjustments and Reclassifications	<u>(169,812)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ (357,646)</u></u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**MILAGRO CHARTER SCHOOL**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ -
Accounts receivable	532,403
Deposits and prepaid expenses	43,226
Other current assets	<u>1,530</u>
Total current assets	<u>577,159</u>

**LONG-TERM ASSETS:**

Leasehold improvements	71,160
Furniture and equipment	48,100
Less: Accumulated depreciation	<u>(98,772)</u>
Total long-term assets	<u>20,488</u>
Total assets	<u><u>\$ 597,647</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 96,148
Accrued payroll and related expenses	228,778
Intercompany payable	86,998
Line of credit	<u>49,050</u>
Total current liabilities	<u>460,974</u>

**NET ASSETS:**

Unrestricted	<u>136,673</u>
Total net assets	<u>136,673</u>
Total liabilities and net assets	<u><u>\$ 597,647</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**MILAGRO CHARTER SCHOOL**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 865,672
Block grant - categorical	160,422
Other state revenue	658,281
Federal revenue	227,208
Local revenue:	
In-lieu property tax revenue	344,863
Other revenue	<u>108,573</u>
Total unrestricted revenues	<u>2,365,019</u>

**EXPENSES:**

Program services:	
Educational programs	2,350,317
Support services:	
General and administrative	<u>160,501</u>
Total expenses	<u>2,510,818</u>
Change in unrestricted net assets	(145,799)
Beginning unrestricted net assets	<u>282,472</u>
Ending unrestricted net assets	<u>\$ 136,673</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**LOS ANGELES**  
**MILAGRO CHARTER SCHOOL**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (145,799)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	21,632
(Increase) and decrease in operating assets:	
Accounts receivable	55,312
Deposits and prepaid expenses	26,302
Other current assets	(1,530)
Increase and (decrease) in operating liabilities:	
Accounts payable	705
Accrued payroll and related expenses	62,526
Intercompany payable	(13,198)
Net cash provided by operating activities	<u>5,950</u>

**CASH FLOWS from INVESTING ACTIVITIES:**

Purchase of fixed assets	<u>(5,000)</u>
Net cash used by investing activities	<u>(5,000)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(50,000)
Proceeds from line of credit	<u>49,050</u>
Net cash used by financing activities	<u>(950)</u>

Net increase (decrease) in cash and cash equivalents	-
Cash and cash equivalents at the beginning of the year	<u>-</u>
Cash and cash equivalents at the end of the year	<u><u>\$ -</u></u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 1,208</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**MILAGRO CHARTER SCHOOL**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 313,602
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(53,762)
Accounts receivable	21,574
Prepaid expenses	43,226
Other current assets	(53,533)
Accounts payable	(47,436)
Intercompany payable	<u>(86,998)</u>
Net Adjustments and Reclassifications	<u>(176,929)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u><u>\$ 136,673</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY  
 NUEVA ESPERANZA CHARTER ACADEMY  
 SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION  
 June 30, 2010**

**ASSETS****CURRENT ASSETS:**

Cash and cash equivalents	\$ 132,507
Accounts receivable	187,631
Deposits and prepaid expenses	26,026
Other current assets	160
Total current assets	<u>346,324</u>

**LONG-TERM ASSETS:**

Leasehold improvements	3,880
Furniture and equipment	95,288
Less: Accumulated depreciation	<u>(13,366)</u>
Total long-term assets	<u>85,802</u>
Total assets	<u>\$ 432,126</u>

**LIABILITIES AND NET ASSETS****CURRENT LIABILITIES:**

Accounts payable	\$ 32,591
Accrued payroll and related expenses	94,107
Current portion of lease payable	30,740
Line of credit	19,950
Total current liabilities	<u>177,388</u>

**LONG-TERM LIABILITIES:**

Long term portion of lease payable	<u>45,541</u>
Total long-term liabilities	<u>45,541</u>
Total liabilities	<u>222,929</u>

**NET ASSETS:**

Unrestricted	<u>209,197</u>
Total net assets	<u>209,197</u>
Total liabilities and net assets	<u>\$ 432,126</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**NUEVA ESPERANZA CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 394,825
Block grant - categorical	75,322
Other state revenue	98,634
Federal revenue	533,440
Local revenue:	
In-lieu property tax revenue	142,104
Other revenue	<u>7,772</u>
Total unrestricted revenues	<u>1,252,097</u>

**EXPENSES:**

Program services:	
Educational programs	1,181,832
Support services:	
General and administrative	<u>99,800</u>
Total expenses	<u>1,281,632</u>
Change in unrestricted net assets	(29,535)
Beginning unrestricted net assets	<u>238,732</u>
Ending unrestricted net assets	<u>\$ 209,197</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**NUEVA ESPERANZA CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (29,535)
Adjustments to reconcile change in net assets to net cash used by operating activities:	
Depreciation	13,366
(Increase) and decrease in operating assets:	
Accounts receivable	(187,631)
Deposits and prepaid expenses	13,590
Other current assets	(160)
Increase and (decrease) in operating liabilities:	
Accounts payable	34,153
Accrued payroll and related expenses	92,224
Net cash used by operating activities	<u>(63,993)</u>

**CASH FLOWS from INVESTING ACTIVITIES:**

Purchase of fixed assets	<u>(19,007)</u>
Net cash used by investing activities	<u>(19,007)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Proceeds from line of credit	<u>19,950</u>
Net cash provided by financing activities	<u>19,950</u>

Net decrease in cash and cash equivalents	(63,050)
Cash and cash equivalents at the beginning of the year	<u>195,557</u>
Cash and cash equivalents at the end of the year	<u>\$ 132,507</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 5,412</u>
Non cash investing and financing activities:	
Acquisition of equipment through capital lease	<u>\$ 76,281</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**NUEVA ESPERANZA CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$     34,858
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	132,507
Accounts receivable	90,525
Prepaid expenses	26,026
Other current assets	160
Furniture and equipment	95,288
Accumulated depreciation	(13,366)
Accounts payable	(80,520)
Lease payable	<u>(76,281)</u>
Net Adjustments and Reclassifications	<u>174,339</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$   209,197</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**SANTA ROSA CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION**  
**June 30, 2010**

**ASSETS**

**CURRENT ASSETS:**

Cash and cash equivalents	\$ 271,398
Accounts receivable	150,350
Deposits and prepaid expenses	<u>6,267</u>
Total current assets	<u>428,015</u>
Total assets	<u><u>\$ 428,015</u></u>

**LIABILITIES AND NET ASSETS**

**CURRENT LIABILITIES:**

Accounts payable	\$ 37,834
Accrued payroll and related expenses	66,082
Line of credit	<u>18,650</u>
Total current liabilities	<u>122,566</u>

**NET ASSETS:**

Unrestricted	<u>305,449</u>
Total net assets	<u>305,449</u>
Total liabilities and net assets	<u><u>\$ 428,015</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**SANTA ROSA CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 364,982
Block grant - categorical	57,372
Other state revenue	90,111
Federal revenue	513,147
Local revenue:	
In-lieu property tax revenue	131,362
Other revenue	<u>17,572</u>
Total unrestricted revenues	<u><u>\$ 1,174,546</u></u>

**EXPENSES:**

Program services:	
Educational programs	1,037,447
Support services:	
General and administrative	<u>81,091</u>
Total expenses	<u>1,118,538</u>
Change in unrestricted net assets	56,008
Beginning unrestricted net assets	<u>249,441</u>
Ending unrestricted net assets	<u><u>\$ 305,449</u></u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**SANTA ROSA CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ 56,008
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
(Increase) and decrease in operating assets:	
Accounts receivable	(150,350)
Deposits and prepaid expenses	(6,021)
Increase and (decrease) in operating liabilities:	
Accounts payable	37,775
Accrued payroll and related expenses	66,082
Net cash provided by operating activities	<u>3,494</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Proceeds from line of credit	<u>18,650</u>
Net cash provided by financing activities	<u>18,650</u>
Net increase in cash and cash equivalents	22,144
Cash and cash equivalents at the beginning of the year	<u>249,254</u>
Cash and cash equivalents at the end of the year	<u>\$ 271,398</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 154</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC LOS ANGELES**  
**SANTA ROSA CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 105,468
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	236,619
Accounts Receivable	11,313
Prepaid expenses	6,267
Other current assets	(3,103)
Accounts payable	<u>(51,115)</u>
Net Adjustments and Reclassifications	<u>199,981</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 305,449</u>

See the accompanying notes to the supplementary information.



**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY  
 TRIUMPH CHARTER ACADEMY  
 SUPPLEMENTARY STATEMENT OF FINANCIAL POSITION  
 June 30, 2010**

**ASSETS****CURRENT ASSETS:**

Cash and cash equivalents	\$ 468,282
Accounts receivable	379,729
Deposits and prepaid expenses	3,095
Other current assets	<u>2,065</u>
Total current assets	<u>853,171</u>

**LONG-TERM ASSETS:**

Leasehold improvements	219,149
Furniture and equipment	80,648
Less: Accumulated depreciation	<u>(109,511)</u>
Total long-term assets	<u>190,286</u>
Total assets	<u>\$ 1,043,457</u>

**LIABILITIES AND NET ASSETS****CURRENT LIABILITIES:**

Accounts payable	\$ 69,499
Accrued payroll and related expenses	168,761
Current portion of loan payable	50,000
Line of credit	<u>48,450</u>
Total current liabilities	<u>336,710</u>

**LONG-TERM LIABILITIES:**

Loan payable - long term portion	<u>150,000</u>
Total long-term liabilities	<u>150,000</u>

**NET ASSETS:**

Unrestricted	<u>556,747</u>
Total net assets	<u>556,747</u>
Total liabilities and net assets	<u>\$ 1,043,457</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**TRIUMPH CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF ACTIVITIES**  
**For the Year Ended June 30, 2010**

**REVENUES:**

State revenue:	
State aid portion of general-purpose block grant	\$ 859,658
Block grant - categorical	183,389
Other state revenue	383,139
Federal revenue	256,221
Local revenue:	
In-lieu property tax revenue	337,237
Other revenue	<u>63,232</u>
Total unrestricted revenues	<u>2,082,876</u>

**EXPENSES:**

Program services:	
Educational programs	2,156,462
Support services:	
General and administrative	<u>162,155</u>
Total expenses	<u>2,318,617</u>
Change in unrestricted net assets	(235,741)
Beginning unrestricted net assets	<u>792,488</u>
Ending unrestricted net assets	<u>\$ 556,747</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**TRIUMPH CHARTER ACADEMY**  
**SUPPLEMENTARY STATEMENT OF CASH FLOWS**  
**For the Year Ended June 30, 2010**

**CASH FLOWS from OPERATING ACTIVITIES:**

Change in Net Assets	\$ (235,741)
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation	23,501
(Increase) and decrease in operating assets:	
Accounts receivable	80,652
Deposits and prepaid expenses	17,723
Other current assets	(1,761)
Increase in operating liabilities:	
Accounts payable	40,546
Accrued payroll and related expenses	91,042
Net cash provided by operating activities	<u>15,962</u>

**CASH FLOWS from INVESTING ACTIVITIES:**

Purchase of fixed assets	<u>(24,900)</u>
Net cash used by investing activities	<u>(24,900)</u>

**CASH FLOWS from FINANCING ACTIVITIES:**

Repayment of loan payable	(50,000)
Proceeds from line of credit	<u>48,450</u>
Net cash used by financing activities	<u>(1,550)</u>

Net decrease in cash and cash equivalents	(10,488)
Cash and cash equivalents at the beginning of the year	<u>478,770</u>
Cash and cash equivalents at the end of the year	<u>\$ 468,282</u>

**SUPPLEMENTAL CASH FLOW DISCLOSURES:**

Cash paid for interest	<u>\$ 7,502</u>
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See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES**

**PUC VALLEY**  
**TRIUMPH CHARTER ACADEMY**  
**RECONCILIATION OF ANNUAL FINANCIAL REPORT**  
**WITH AUDITED FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2010**

June 30, 2010 Annual Financial Report	
Fund Balances (Net Assets)	\$ 675,376
Adjustments and Reclassifications:	
Increasing (Decreasing) the Fund Balance (Net Assets):	
Cash and cash equivalents	(7,157)
Accounts Receivable	18,584
Prepaid expenses	3,095
Other current assets	(12,435)
Accumulated depreciation	20,222
Accounts payable	(133,953)
Loan payable	<u>(6,985)</u>
Net Adjustments and Reclassifications	<u>(118,629)</u>
June 30, 2010 Audited Financial Statement	
Fund Balances (Net Assets)	<u>\$ 556,747</u>

See the accompanying notes to the supplementary information.

**PARTNERSHIPS TO UPLIFT COMMUNITIES****NOTES TO SUPPLEMENTARY INFORMATION**  
**For the Year Ended June 30, 2010****NOTE 1 - PURPOSE OF SCHEDULES:****A. Schedule of Instructional Time Offered**

This schedule presents information on the amount of instructional time offered by the Schools and whether the Schools complied with the provisions of Education Code Sections 46200 through 46206.

**B. Schedule of Average Daily Attendance (ADA)**

Average daily attendance is a measurement of the number of pupils attending classes of the Schools. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of state funds are made to charter schools. This schedule provides information regarding the attendance of students at various grade levels and in different programs.

**C. Schedule of Federal Expenditures**

OMB Circular A-133 requires disclosure of the financial activities of all federally funded programs. To comply with A-133, this schedule was prepared for the organization and is presented on the accrual basis of accounting.

**D. Charter School Financial Statements and Reconciliations of Annual Financial Reports with Audited Financial Statements**

These financial statements consist of a statement of financial position and a statement of activities for each charter school and a reconciliation that provides the information necessary to reconcile the fund balance (net assets) as reported on the annual financial report to the audited financial statements.

**REPORT ON INTERNAL CONTROL OVER FINANCIAL  
REPORTING AND ON COMPLIANCE AND OTHER  
MATTERS BASED ON AN AUDIT OF FINANCIAL  
STATEMENTS PERFORMED IN ACCORDANCE  
WITH *GOVERNMENT AUDITING STANDARDS***

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the consolidated financial statements of Partnerships to Uplift Communities (PUC) as of and for the year ended June 30, 2010, and have issued our report thereon dated XX, 2010. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States.

Internal Control Over Financial Reporting

In planning and performing our audit, we considered PUC's internal control over financial reporting as a basis for designing our audit procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of PUC's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of PUC's internal control over financial reporting.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing PUC's assigned functions, to prevent or detect and correct misstatements on a timely basis. A material weakness is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis.

Compliance and Other Matters

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over financial reporting that might be deficiencies, significant deficiencies or material weaknesses. We did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses, as defined above. However, we identified certain deficiencies in internal control over financial reporting, described in the accompanying schedule of findings and questioned costs that we consider to be significant deficiencies in internal control over financial reporting. The results of our tests disclosed instances of non-compliance or other matters that are required to be reported under *Government Auditing Standards* and which are described in the accompanying schedule of findings and questioned costs as Finding 2010-1, Finding 2010-2, Finding 2010-3 and Finding 2010-4. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material



weakness, yet important enough to merit attention by those charged with governance.

**REPORT ON INTERNAL CONTROL OVER FINANCIAL  
REPORTING AND ON COMPLIANCE AND OTHER  
MATTERS BASED ON AN AUDIT OF FINANCIAL  
STATEMENTS PERFORMED IN ACCORDANCE  
WITH *GOVERNMENT AUDITING STANDARDS***

PUC's response to the findings identified in our audit is described in the accompanying schedule of findings and questioned costs. We did not audit PUC's response and accordingly, we express no opinion on it.

This report is intended solely for the information and use of the Board, management, the Los Angeles Unified School District and federal and state awarding agencies and is not intended to be and should not be used by anyone other than these specified parties.

VICENTI, LLOYD & STUTZMAN LLP

XX, 2010

**REPORT ON COMPLIANCE WITH REQUIREMENTS  
APPLICABLE TO EACH MAJOR PROGRAM  
AND ON INTERNAL CONTROL OVER COMPLIANCE  
IN ACCORDANCE WITH OMB CIRCULAR A-133**

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

Compliance

We have audited the compliance of Partnership to Uplift Communities (PUC) with the types of compliance requirements described in the U.S. Office of Management and Budget (OMB) Circular A-133 Compliance Supplement that are applicable to each of its major federal programs for the year ended June 30, 2010. PUC's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs. Compliance with the requirements of laws, regulations, contracts and grants applicable to each of its major federal programs is the responsibility of PUC's management. Our responsibility is to express an opinion on PUC's compliance based on our audit.

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and OMB Circular A-133, *Audits of States, Local Governments, and Nonprofit Organizations*. These standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about PUC's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of PUC's compliance with those requirements.

In our opinion, PUC complied, in all material respects, with the requirements referred to above that are applicable to each of its major federal programs for the year ended June 30, 2010. However, the results of our auditing procedures disclosed instances of noncompliance with those requirements, which are required to be reported in accordance with OMB Circular A-133 and which are described in the accompanying schedule of findings and questioned costs as Finding 2010-1, Finding 2010-2 and Finding 2010-3.

**REPORT ON COMPLIANCE WITH REQUIREMENTS  
APPLICABLE TO EACH MAJOR PROGRAM  
AND ON INTERNAL CONTROL OVER COMPLIANCE  
IN ACCORDANCE WITH OMB CIRCULAR A-133**

Internal Control Over Compliance

The management of PUC is responsible for establishing and maintaining effective internal control over compliance with requirements of laws, regulations, contracts and grants applicable to federal programs. In planning and performing our audit, we considered PUC's internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the PUC's internal control over compliance.

Our consideration of the internal control over compliance was for the limited purpose described in the preceding paragraph of this section and would not necessarily identify all deficiencies in PUC's internal control that might be significant deficiencies or material weaknesses as defined below. However, as discussed below, we identified curtailed deficiencies in internal control over compliance that we consider to be significant deficiencies.

A control deficiency in PUC's internal control over compliance exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect noncompliance with a type of compliance requirement of a federal program on a timely basis. A significant deficiency is a control deficiency, or combination of control deficiencies that adversely affects the entity's ability to administer a federal program such that there is more than a remote likelihood that noncompliance with a type of compliance requirement of a federal program that is more than inconsequential will not be prevented or detected by the PUC's internal control. We consider the deficiencies in internal control over compliance described in the accompanying schedule of findings and questioned costs as Finding 2010-1, Finding 2010-2, Finding 2010-3 and Finding 2010-4 to be significant deficiencies.

A material weakness is a significant deficiency, or combination of significant deficiencies, that results in more than a remote likelihood that material noncompliance with a type of compliance requirement of a federal program will not be prevented or detected by PUC's internal control. We did not consider any of the deficiencies described in the accompanying schedule of findings and questioned costs to be material weaknesses.

PUC's response to the findings identified in our audit is described in the accompanying schedule of findings and questioned costs. We did not audit PUC's response and, accordingly, we express no opinion on it.

This report is intended for the information and use of management, Los Angeles Unified School District, and federal and state awarding agencies and is not intended to be and should not be used by anyone other than these specified parties.

VICENTI, LLOYD & STUTZMAN LLP

XX, 2010

## REPORT ON STATE COMPLIANCE

Board of Directors  
Partnerships to Uplift Communities  
111 North First Street, Suite 100  
Burbank, CA 91502-1851

We have audited the consolidated financial statements of Partnership to Uplift Communities (PUC) as of and for the year ended June 30, 2010, and have issued our report thereon dated XX, 2010. Our audit was made in accordance with auditing standards generally accepted in the United States of America, the standards for financial and compliance audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the *2008-09 Standards and Procedures for Audits of California K-12 Local Educational Agencies*, published by the Education Audit Appeals Panel. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

PUC's management is responsible for PUC's compliance with laws and regulations. In connection with the audit referred to above, we selected and tested transactions and records to determine PUC's compliance with the laws and regulations applicable to the following items:

<u>Description</u>	<u>Procedures in Audit Guide</u>	<u>Procedures Performed</u>
Attendance accounting:		
Attendance reporting	8	Not applicable
Kindergarten continuance	3	Not applicable
Continuation education	10	Not applicable
Independent study	23	Not applicable
Instructional time:		
School Districts	6	Not applicable
County Offices of Education	3	Not applicable
Class size reduction program:		
General requirements	7	Yes
Option 1	3	Yes
Option 2	4	Not applicable
One school serving K-3	4	Not applicable
Instructional materials and general requirements	8	Not applicable
Ratios of administrative employees to teachers	1	Not applicable
Classroom teacher salaries	1	Not applicable
Early retirement incentive program	4	Not applicable

**REPORT ON STATE COMPLIANCE**

<u>Description</u>	<u>Procedures in Controller's Audit Guide</u>	<u>Procedures Performed</u>
GANN limit calculation	1	Not applicable
School Accountability Report Card	3	Not applicable
Public hearing requirement—receipt of funds	1	Not applicable
After School Education and Safety Program:		
General requirements	4	Yes
After school	4	Yes
Before school	5	Not applicable
Charter Schools:		
Contemporaneous records of attendance	1	Yes
Mode of instruction	1	Yes
Nonclassroom-based instructional/independent study	15	Not applicable
Determination of funding for nonclassroom-based instruction	3	Not applicable
Annual instructional minutes – classroom based	3	Yes

Based on our audit, we found that, for the items tested, PUC complied with the laws and regulations of the state programs referred to above. Further, based on our examination, for items not tested, nothing came to our attention to indicate that PUC had not complied with the laws and regulations of state programs and requirements, except as described in the Schedule of Findings and Questioned Costs.

This report is intended solely for the information and use of the Board, management, the Los Angeles Unified School District, the Los Angeles County Office of Education, California Department of Education, and the State Controller's Office and is not intended to be and should not be used by anyone other than these specified parties.

VICENTI, LLOYD & STUTZMAN LLP

XX, 2010

# PARTNERSHIPS TO UPLIFT COMMUNITIES

## SCHEDULE OF FINDINGS AND QUESTIONED COSTS For the Year Ended June 30, 2010

### Section I - Summary of Auditors' Results

#### Financial Statements

Type of auditor's report issued XX, 2010: *Unqualified*

Internal control over financial reporting:

Material weakness(es) identified? *No*

Significant deficiencies identified that are  
not considered to be material weakness(es)? *Yes*

Noncompliance material to financial statements noted? *Yes*

#### Federal Awards

Internal control over major programs:

Material weakness(es) identified? *No*

Significant deficiencies identified that are  
not considered to be material weakness(es)? *Yes*

Type of auditor's report issued on compliance for major programs: *Unqualified*

Any audit findings disclosed that are required to be reported  
in accordance with section 510(a) of (Circular A-133)? *Yes*

Identification of major programs:

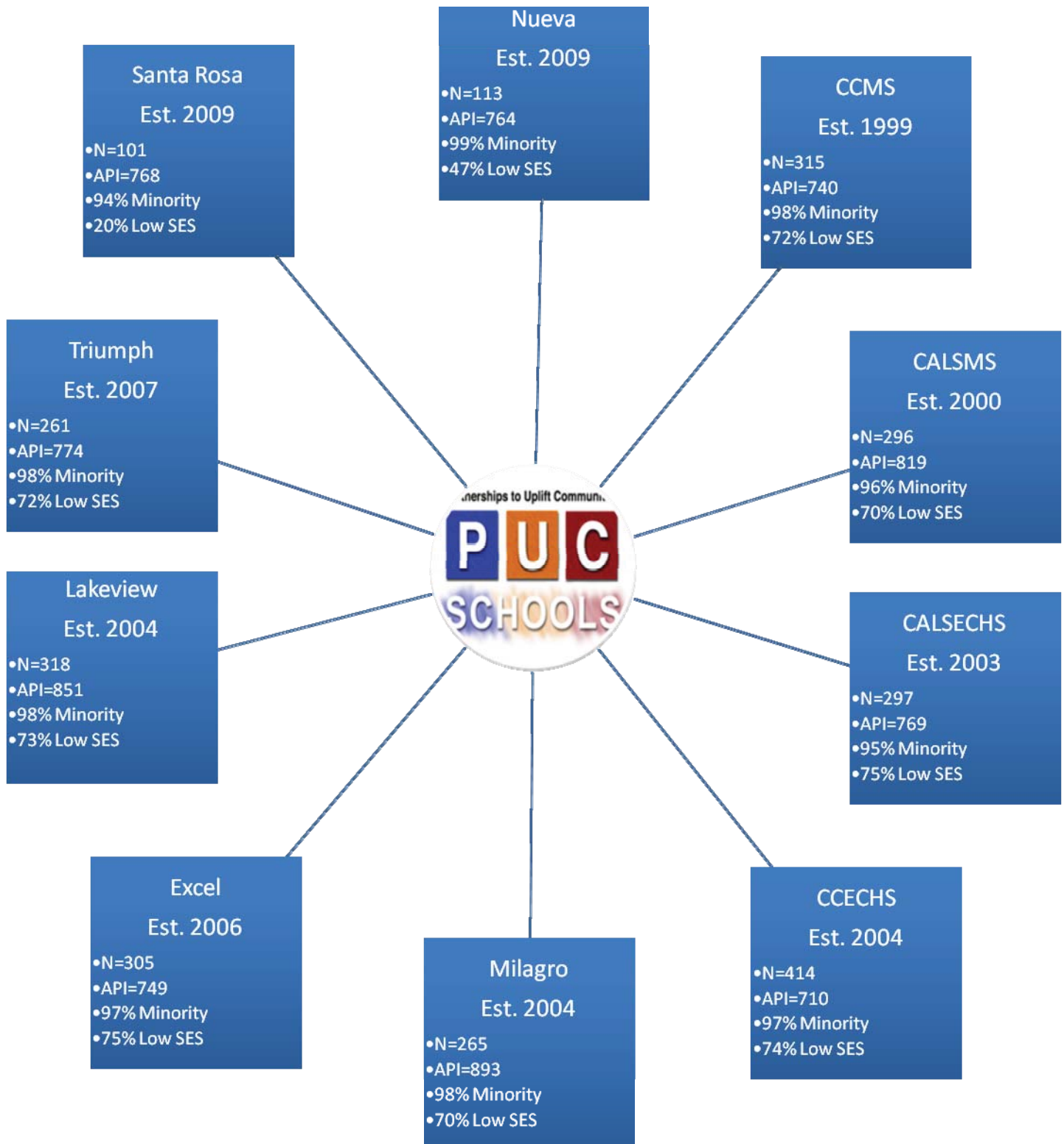
<u>CFDA Number(s)</u>	<u>Name of Federal Program or Cluster</u>
84.010, 84.389	Title I Part A Cluster
10.555	Child Nutrition Programs
84.394	ARRA: State Fiscal Stabilization Fund
84.282A	Title V, Part B, Implementation

Dollar threshold used to distinguish between type A and type B programs: \$300,000

Auditee qualified as low-risk auditee? *No*



# 2009-2010 Partnerships to Uplift Communities



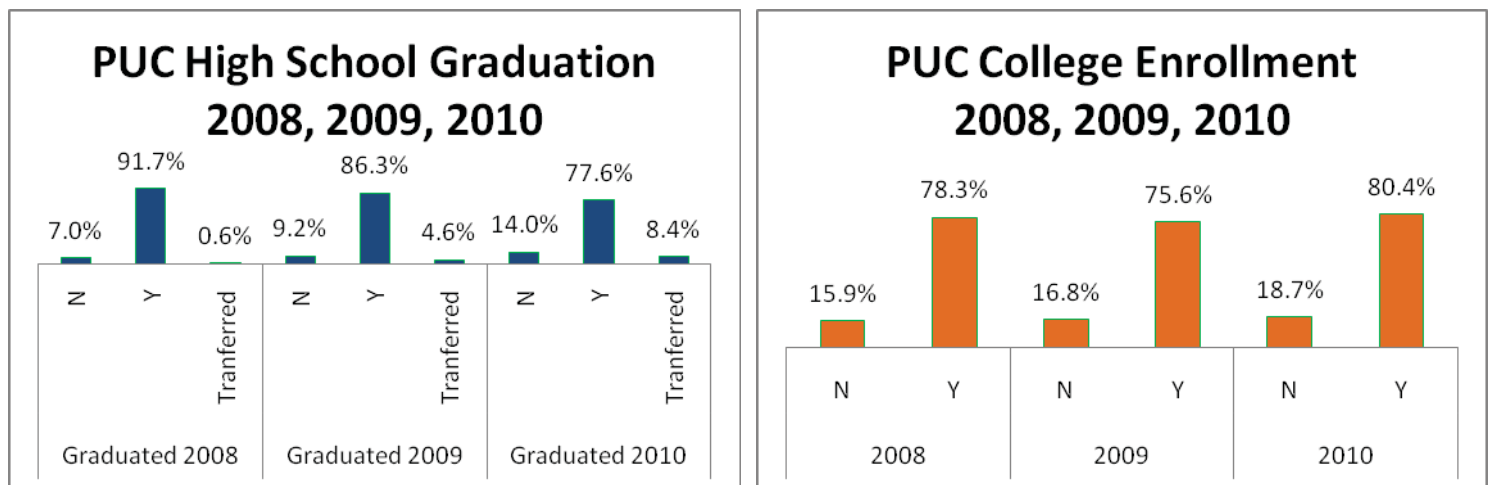
## Introduction

The purpose of this report is to provide a snapshot of our Partnerships to Uplift Communities (PUC Schools). While snapshots are inherently static, it is intended that the reader of this report will capture more than a glimpse of the dynamic educational processes occurring at our schools. To accomplish this aim we will first look at how PUC is measuring up against our three commitments. Next, we will provide a snapshot of the relationship between PUC Performance Management and student achievement. The section on PM will be followed by an overview of the performance of PUC Schools. Finally, we will paint a comprehensive picture of each PUC school to go with the figure presented above.

## Commitment 1

*Five times more college graduates within the communities we serve*

PUC schools are deeply embedded in two distinct communities: Northeast San Fernando Valley and Northeast Los Angeles. American Fact Finder (2000, Zip=91342) reports that roughly 60% of the citizens in the Northeast San Fernando Valley are high school graduates and roughly 12% of citizens are reported as having earned a Bachelor's degree or higher. In addition, American Fact Finder (2000, Zip=90031) reports that nearly 36% of citizens in the Northeast region of Los Angeles are high school graduates and roughly 7% earned a Bachelor's degree or higher. In 2010, according to information received from CALSECHS and CCECHS, PUC Early College High Schools graduated roughly 78% of the senior class and 80% of these students enrolled in two- or four year colleges.



**Figure 1: 2008-2010 Graduation Outcomes and College Enrollment for PUC Early College High Schools**

As indicated in the figure above, the proportion of students graduating has declined from 2008 to 2010, at the same time the proportion of students enrolling in two- or four-year colleges has increased over the same period. With the data systems work PUC is undertaking with The College Ready Promise (TCRP) it is anticipated that we will be able to link coursework with high school graduation and college enrollment outcomes such that we will be able to identify course sequences and school experiences that are most likely to lead to high school graduation, college enrollment and graduation. In addition, we anticipate the ability to quantify the number of college graduates we develop with the communities we serve.

**Commitment 2**  
*After four years with us, Students are proficient*

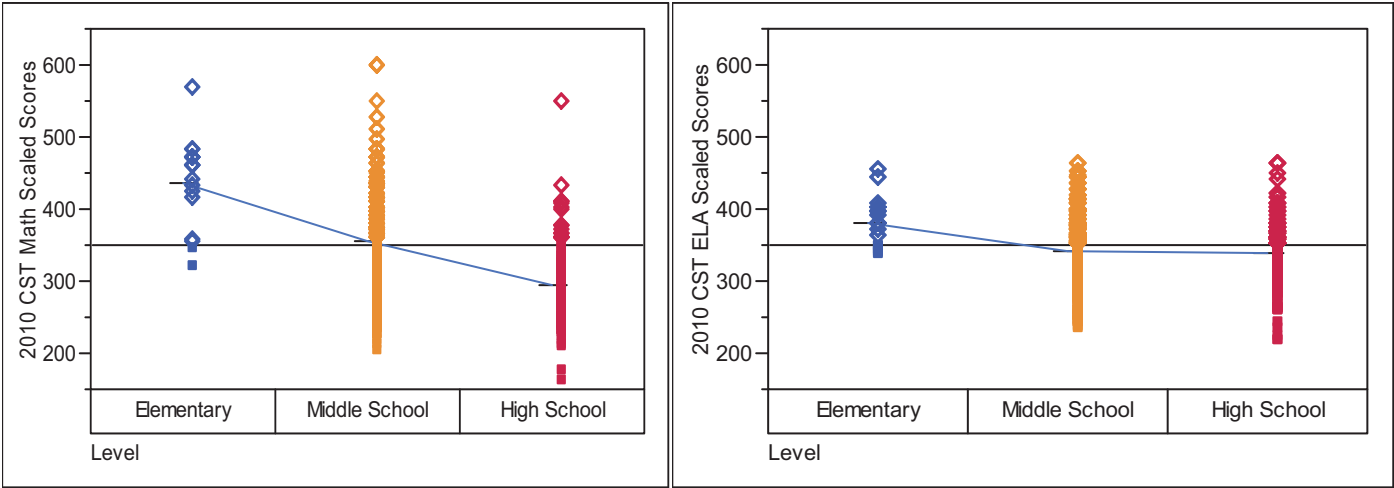
As a measure of proficiency, the California Standardized Test (CST) program represents one target. The CST program assesses students annually from 2<sup>nd</sup> grade thru 11<sup>th</sup> grade in English Language Arts and Math. History and Science are assessed periodically throughout students’ academic careers. While the CST measure of proficiency represents one piece of the puzzle, obtaining 100% proficiency represents quite a challenge. Students enter PUC Schools at different stages in their academic careers with varying degrees of academic preparedness and often exit before receiving the full PUC treatment.

To what extent are PUC Schools upholding Commitment 2? In other words, to what extent are PUC students who stay with PUC for their elementary school year’s proficient when they complete elementary schooling? What about PUC students who stay for their middle or high school career? To address these questions we isolated those students who have data for the duration in question and review average CST ELA and Math scale scores, where 350 points and above is considered proficient by the State of California.

Elementary School (1 School)	17
Middle School (7 Schools)	431
High School (2 Schools)	172
Total	620

**Table 1: PUC Students who stayed with PUC**

Seventeen of the elementary school students who promoted in spring of 2010 were with PUC from at least grade 2, and have CST data for each time point through grade 5. Four-hundred and thirty-one middle school students who promoted in spring of 2010 were with PUC from at least grade 6, and have CST data for each of the three time points through grade 8. Finally, 172 high schools students who were in 11<sup>th</sup> grade in 2010 were with PUC from at least 9<sup>th</sup> grade, and have data for each of the three time points through grade 11.

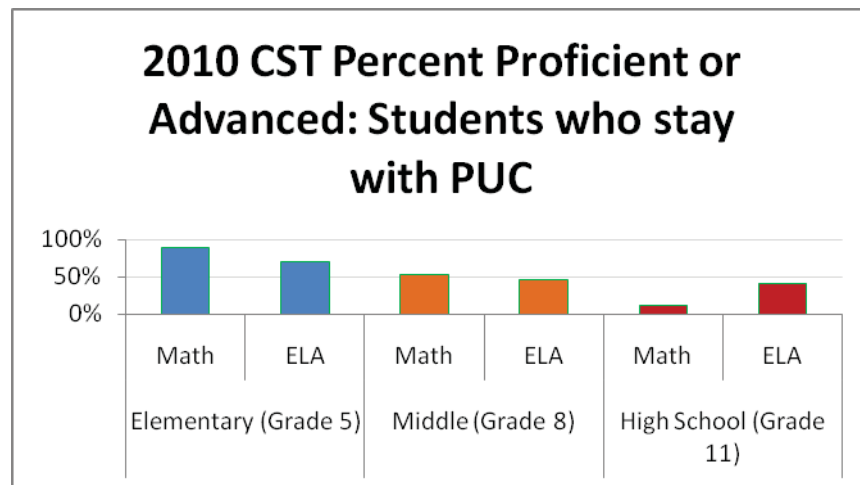


**Figure 2a: 2010 CST Math Scores of Students who stayed with PUC    Figure 2b: 2010 CST ELA Scores of Students who stayed with PUC**

In figure 2a and figure 2b the diamond shaped points are students who were proficient in the CST Math and ELA test they took in 2010. The solid square points are students who were not proficient in 2010. The solid horizontal line through the figure is at 350, the state determined measure of proficiency. The figure illustrates a general trend that indicates, on average, CST performance declines from Elementary through High School. In

addition, it is clear that the range of scores is much wider for Math relative to ELA performance scores. These figures indicate that, on average, Elementary students who stay with PUC will achieve proficiency in Math and ELA. On average, PUC Middle School students, who stayed with PUC from 6<sup>th</sup> thru 8<sup>th</sup> grade, demonstrated proficiency in Math, but fell short in ELA. And, on average, PUC High School students, who stayed with PUC from at 9<sup>th</sup> thru 11<sup>th</sup> grade, did not achieve proficient levels in Math or ELA. However, as is evident, there are Middle and High School students who did achieve proficient levels in ELA and Math. What percent of students who stayed with PUC demonstrated proficiency?

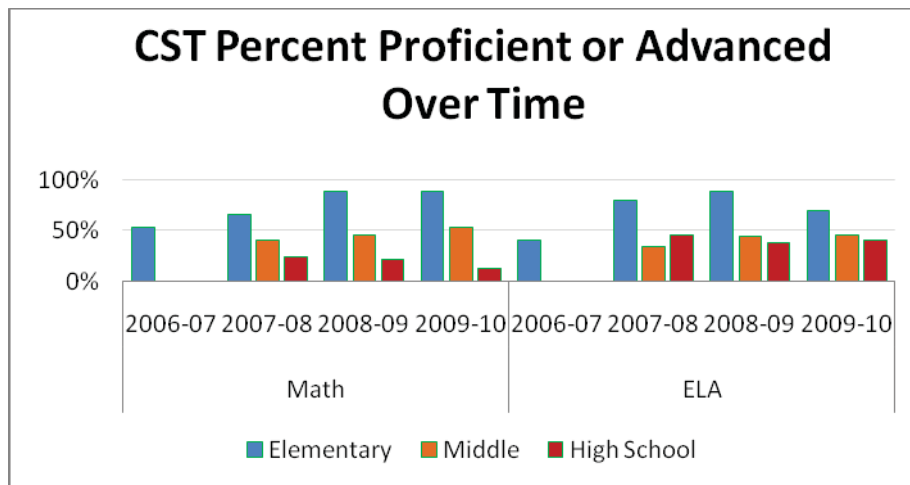
	Elementary (Grade 5)		Middle (Grade 8)		High School (Grade 11)	
	Math	ELA	Math	ELA	Math	ELA
Proficient +	89%	70%	53%	46%	12%	41%



**Figure 3: CST 2010 Percent Proficient or Advanced (students who stayed with PUC)**

The figure above presents the percentage of students proficient or above in Math and ELA. The trends are similar to those presented in the figures above. Given that the information presented thus far is for 5<sup>th</sup> grade, 8<sup>th</sup> grade, or 11<sup>th</sup> grade how do these students look over time?

	2006-07		2007-08		2008-09		2009-10	
	Math	ELA	Math	ELA	Math	ELA	Math	ELA
Elementary	53%	41%	66%	80%	89%	88%	89%	70%
Middle			40%	34%	45%	44%	53%	46%
High			24%	45%	21%	38%	12%	41%



**Figure 4: CST Percent Proficient or Advanced (students who stayed with PUC)**

The graph above shows the same group of students over time. In other words, the graph illustrates the percent of the group who demonstrated proficiency on the Math or ELA portion of the CST program over time. As is visible gains occurred in Elementary from grade two to grade three and from grade three to grade four in both Math and ELA, while from grade four to grade five Elementary flattened out in Math and declined in ELA. With respect to Middle School, gains in Math and ELA were observed from grade 6 to grade 7 and from grade 7 to grade 8. Looking at Math, High School saw losses from 9<sup>th</sup> to 10<sup>th</sup> grade and from 10<sup>th</sup> to 11<sup>th</sup> grade, while in ELA; the pattern for High School appears to be slightly U-shaped: slight losses were observed from 9<sup>th</sup> to 10<sup>th</sup> grade and slight gains were observed from 10<sup>th</sup> to 11<sup>th</sup> grade.

Recall that the data presented was to address the extent to which PUC was upholding Commitment 2. We isolated students for whom data was extant over the duration of Elementary, Middle, or High School and reviewed the progress for these students. Is PUC fulfilling Commitment 3?

### Commitment 3

*Students commit to uplift our communities now and forever*

While extremely important, commitment 3 is currently difficult to measure. We have yet to collect data regarding our students' beliefs, knowledge, and behaviors regarding civic engagement and commitment. However, to some degree we can infer students' commitment to uplifting our communities now by counting the number of PUC graduates who come back to work for PUC. Currently, 43 PUC graduates work for PUC.

Job Type	Count	Location	Count
21stCentAfterschool Tutor	4	CALS EARLY COLLEGE HS	1
Administrative Assistant	1	CALSMS	1
After School Tutor-Class	2	COMMUNITY CHARTER ECHS	6
ASES Enrich Tutor-Class	2	COMMUNITY CHARTER MS	5
ASES Site Coordinator	2	EXCEL CHARTER ACADEMY	1
ASES Tutor-Classified	14	LAKEVIEW	5
Athletic Coach	1	LAKEVIEW CHARTER HS	1
Clerk	1	MILAGRO	2
College Counselor Asst	1	NUEVA ESPERANZA CH ACD	2
Data Entry Clerk	11	PUC HOME OFFICE	12
IT Intern	1	SANTA ROSA CH ACD	2
Lunch server	1	Shared	2

Office Clerk - PT	1	TRIUMPH CHARTER ACADEMY	2
Supervision - FT	1	TRIUMPH CHARTER HS	1
Total	43	Total	43

**Table 2a: 2010 PUC Employees/Alumni (Job Type)**

**Table 2b: 2010 PUC Employee/Alumni (Job Location)**

The tables above show what PUC Alumni are doing and where they are working. It is encouraging that PUC students return to our PUC community and contribute to the culture and vitality. In the future we plan to collect data that enables us to infer attitudes of civic engagement and commitment our students have. In addition we plan to determine which educational experiences correlate with greater degrees of civic engagement observed.

PUC is founded on three related commitments. First PUC is committed to expanding college attainment within partnership communities. Next PUC is committed to providing students, who stay with PUC, the experiences and challenges to attain proficiency after four years of treatment. Finally, PUC is committed to fostering civic engagement and commitment within PUC students. As the foregoing analysis shows, PUC has successes and areas to focus on. While PUC is graduating roughly 80% of the candidates and sending roughly 4/5 of these students to two or four year college, PUC has work to do in counteracting the declining academic proficiency outcomes that were presented. It is encouraging to see that many of PUC's alumni come back to give back. In order to gain a more complete picture of commitment 3 it will be necessary to collect additional data at multiple times in multiple grade levels.

## **Accountability and Development**

### *Two sides of the same coin*

PUC has a system that on the one the hand holds teachers and school leadership accountable and on the other hand provides the necessary information for the development of capacity, competence, and performance. The system is distributed along two lines. First, teachers are evaluated with a performance management rubric, which measures teacher practices and behaviors in four critical areas. Second, PUC piloted a Benchmark assessment process which measures student achievement by assessments aligned with the Blueprints of the California Standards.

## **Performance Appraisal**

The performance appraisal process measures practices and behaviors on four key dimensions: Operations, Planning, Instruction, and Culture. Personnel are assigned a value from 1 to 4 in each critical area and then an average is generated from these scores.

3.6 - 4.0	Mastery	8%
3.1 - 3.5	Proficient	37%
2.6 - 3.0	In Progress	46%
2 - 2.5	Does Not Meet	9%

**Table 3: PUC PM Scale Table and Distribution**

Table 3 indicates the average PM scores that are used to categorize personnel among four categories. If personnel are assigned to the "Does not Meet" category they achieved an average PM score of 2.5 or below. At the other extreme, if personnel are assigned to the "Mastery" category they achieved an average PM score of 3.6 to 4. The distribution of personnel among the four categories is also presented in table 3. Roughly nine percent of personnel were categorized as "Does not meet"; 46% were placed "In Progress"; 37% were categorized as

“Proficient”; and eight percent were seen as demonstrating “Mastery”. The distribution of scores appears to be relatively symmetric.

Do PM scores correlate with student achievement? To address this question, average PM scores were calculated for each PUC school along with average CST scale scores in ELA, Math, History, and Science. Once average PM and CST scores were calculated the strength of the relationship between the average and the four PM domains and CST scores were estimated.

	<i>Operations</i>	<i>Planning</i>	<i>Instruction</i>	<i>Culture</i>	<i>Average</i>
<u><b>ELA</b></u>	0.71	0.03	0.44	0.13	0.22
<u><b>Math</b></u>	0.56	0.16	0.48	0.22	0.32
<u><b>History</b></u>	0.06	0.71	0.54	0.50	0.57
<u><b>Science</b></u>	0.83	0.47	0.75	0.58	0.64

**Table 4: Correlation Coefficients of CST Scores by PM Scores**

Table 4 shows the coefficients that estimate the strength of the relationship between PM and CST scores.

The correlation coefficient ranges from -1 to +1. A value of -1 suggests two scores are perfectly negatively correlated. A value of 0 suggests that two scores are not correlated at all. And, a value of +1 suggests that two scores are perfectly positively correlated. Typically, strong relationships are represented by coefficients greater than |0.6|. Moderate relationships are represented by coefficients greater than |0.4| but less than |0.6|. And, weak relationships are represented by coefficients greater than |0.15| but less than |0.4|.

ELA	Operations	Strong
ELA	Planning	Null
ELA	Instruction	Moderate
ELA	Culture	Null
ELA	Average	Weak
Math	Operations	Moderate
Math	Planning	Weak
Math	Instruction	Moderate
Math	Culture	Weak
Math	Average	Weak
History	Operations	Null
History	Planning	Strong
History	Instruction	Moderate
History	Culture	Moderate
History	Average	Moderate
Science	Operations	Strong
Science	Planning	Moderate
Science	Instruction	Strong
Science	Culture	Moderate
Science	Average	Strong

**Table 5: Summary of Relationships between PM and CST Scores**

Therefore, it is evident that PM scores relate to CST scores and that the relationships vary between pairs of scores. Specifically, strong relationships exist between Science and Operations, Science and Instruction, and



Science and Average PM Scores; History and Planning; and ELA and Operations. Moderate relationships exist between ELA and Planning; Math and Operations and Math and Instructions; History and Instruction, History and Culture, and History and Average PM scores; Science and Planning and Science and Culture.

### Benchmark Assessment

PUC piloted a Benchmark Assessment process which was faithfully carried out in the Middle Schools with respect to ELA. Assessments were created by Curriculum and Instruction and aligned with the California Standards. Benchmarks were administered four times throughout the 2009-10 academic school year.

	Pre-Test	BM 1	BM 2	Post-Test
Proficient +	7%	22%	46%	51%

**Table 6: 2010 Middle School ELA Benchmarks**

Table 6 presents the percent of students scoring proficient or advanced on each administration of the Benchmark Assessment.

The general trend is that more students are gaining proficiency with the ELA material over the course of the semester.

To what extent do Benchmark Assessment results predict CST results? The estimated correlation between the Benchmark 2 and the English Language Arts CST scores for middle school is roughly 0.77, which, according to most researchers is adequate for concurrent validity and group prediction. Therefore, according to a logistic regression model used to predict probabilities, students who scored proficient or advanced on Benchmark 2 are four times more likely to score proficient or advanced on the ELA portion of the CST. In other words, according to the model students who passed Benchmark 2 had an 80.6% chance of passing the ELA portion of the CST exam.

Therefore, it is reasonable to assume that the Benchmark Assessment for middle school ELA has moderately strong criterion-related validity with relative to the ELA portion of the CST program for Middle School ELA.

The Performance Appraisal and Benchmark Assessment processes are, on the one hand used to hold personnel accountable and on the other hand used to provide teachers and leaders with formative information to develop competency and capacity to enhance teaching performance and student achievement.

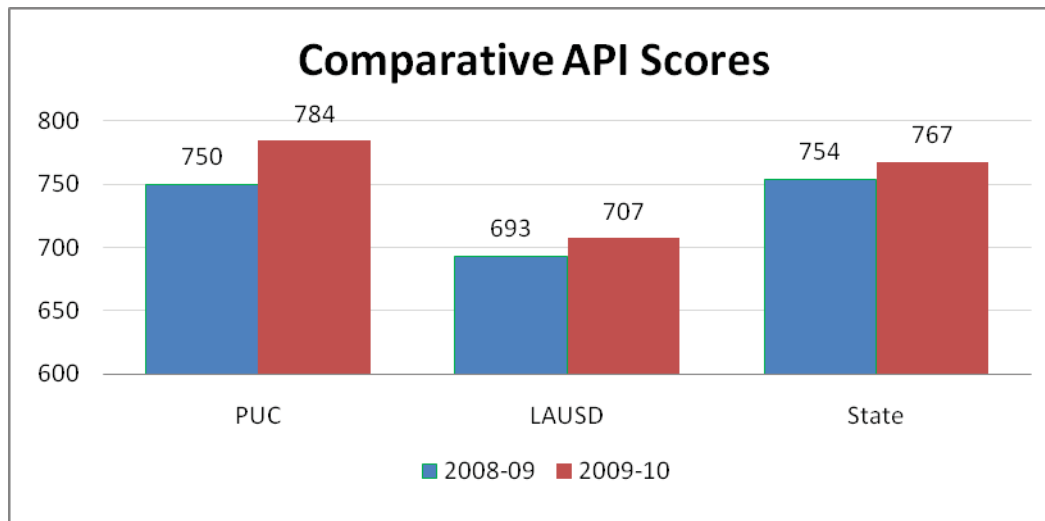
### PUC School Performance: An Overview

The purpose of this section is to provide a comparative overview of PUC Schools.

School Site	2010 ELA AMO	2010 ELA Actual	Difference	2010 Math AMO	2010 Math Actual	Difference	Met AYP	2009 API	2010 API	Difference
Milagro	56.8	67.2	10.4	58	86.4	28.4	Yes	907	893	-14
CALSMS	56.8	54.8	-2	58	56.9	-1.1	Yes*	797	819	22
CCMS	56.8	40.1	-16.7	58	43.7	-14.3	No	695	740	45
Excel	56.8	44.9	-11.9	58	41.8	-16.2	No	768	749	-19
Lakeview	56.8	59.7	2.9	58	72.7	14.7	No**	827	851	24
Triumph	56.8	38.7	-18.1	58	58.7	0.7	Yes*	662	774	112
Nueva	56.8	42.6	-14.2	58	50.9	-7.1	No	-	764	First Year
Santa Rosa	56.8	40.9	-15.9	58	41.9	-16.1	No	-	768	First Year
CALSECHS	55.6	56.1	0.5	54.8	64.2	9.4	Pending	732	769	37
CCECHS	55.6	38.1	N/A	54.8	18	N/A	Pending	713***	710	-3

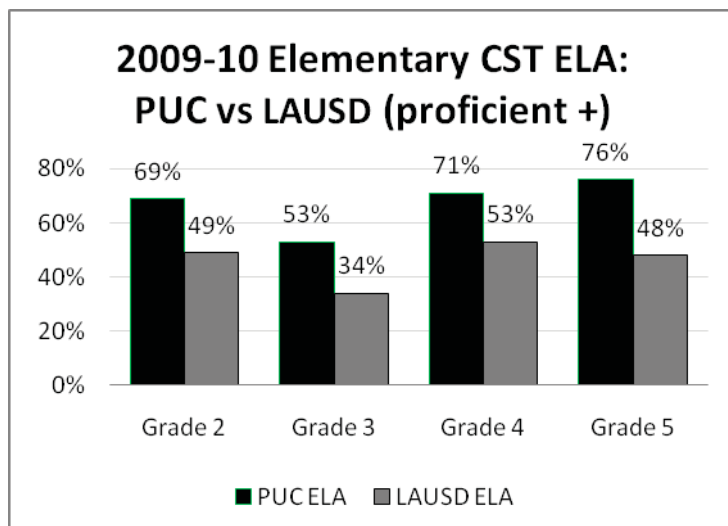
**Table 7: Overview of PUC Schools AYP and API**

Table 7 provides an overview of the performance of PUC schools from the perspective of the State. In regards to ELA, Milagro, Lakeview Charter Academy, and CALSECHS outperformed the State determined AMO. With respect the Math, Milagro, Lakeview Charter Academy, Triumph Charter Academy outperformed the AMO set by the State. In addition, five of the eight veteran sites increased their API scores and the two new middle schools scored well above 700. Table 7 makes it clear that there is a range of performance occurring within PUC schools and work needs to be done in order to bring all schools to high performance standards.

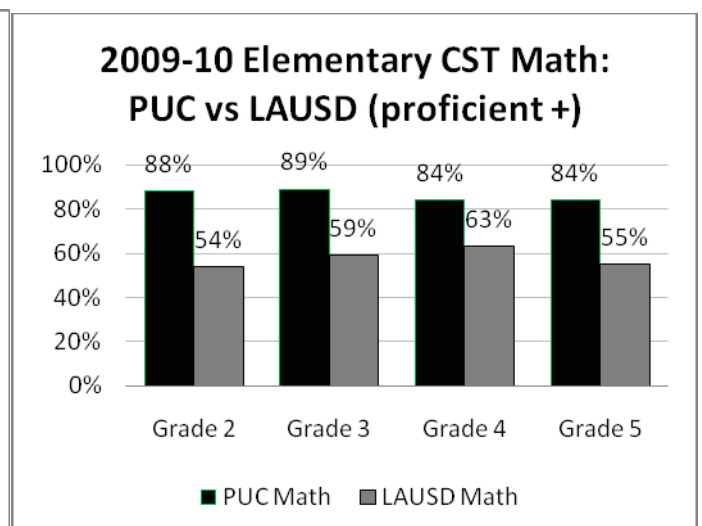


**Figure 5: Average API Scores compared with LAUSD and the State**

Figure 5 illustrates the fact, on average, PUC schools outperformed LAUSD and the State with respect to API. Although all three entities increased, on average, PUC increased 34 points, LAUSD improved by 14 points, and the State improved by 13 points.

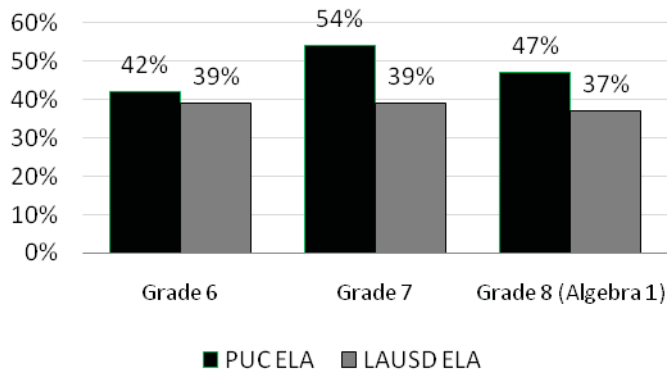


**Figure 6A: Percent Proficient or Advanced in ELA PUC vs LAUSD**

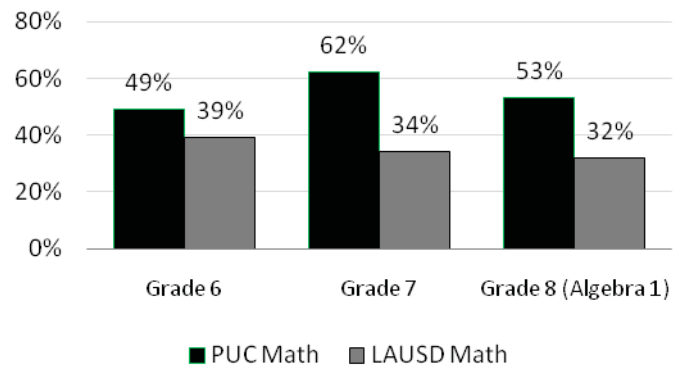


**Figure 6B: Percent Proficient or Advanced in Math PUC vs LAUSD**

**Middle School CST ELA:  
PUC vs LAUSD (proficient +)**



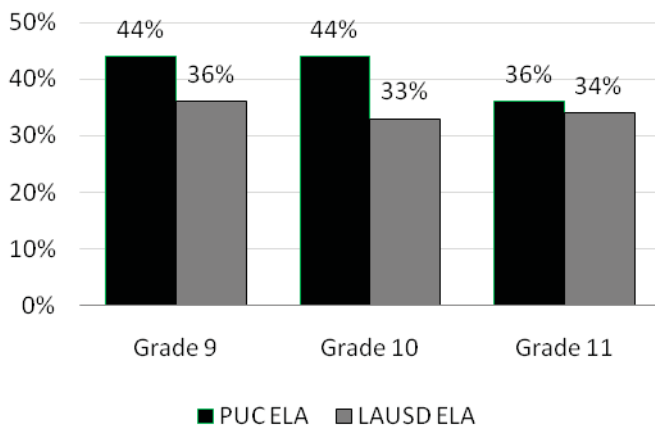
**2009-10 Middle Schools CST Math:  
PUC vs LAUSD (proficient +)**



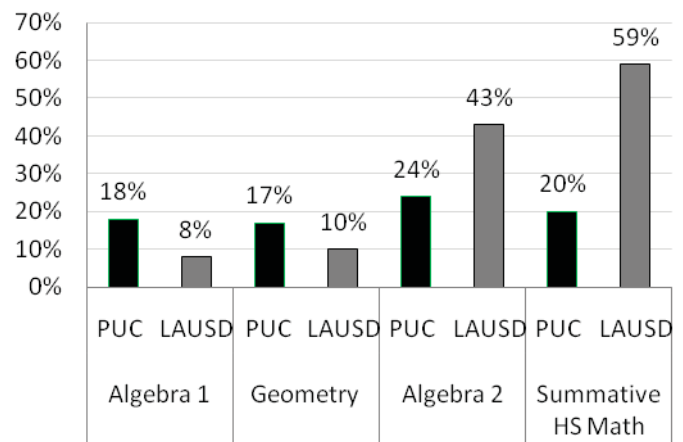
**Figure 7A: Percent Proficient or Advanced in ELA PUC vs LAUSD**

**Figure 7B: Percent Proficient or Advanced in Math PUC vs LAUSD**

**2009-10 High School CST ELA:  
PUC vs LAUSD (proficient +)**



**2009-10 High School CST Math:  
PUC vs LAUSD (proficient +)**



**Figure 8A: Percent Proficient or Advanced in ELA PUC vs LAUSD**

**Figure 8B: Percent Proficient or Advanced in Math PUC vs LAUSD**

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Milagro		893	67.2%	86.4%	N/A	89%	Unavailable

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
CALSMS		819	54.8%	56.9%	53.5%	78%	3.4

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
CCMS		740	40.1%	43.7%	35.1%	50.5%	Unavailable

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Excel		749	44.9%	41.8%	50.5%	63.7%	Unavailable

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Lakeview Charter Academy		851	59.7%	72.7%	49.0%	71.0%	2.9

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Nueva Esperanza		764	42.6%	50.9%	N/A	N/A	2.88

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Santa Rosa		768	40.9%	41.9%	N/A	N/A	2.7

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
Triumph Charter Academy		774	38.7%	58.7%	58.0%	77.0%	2.97

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
CALSECHS		769	56.1%	64.2%	43.7%	65.4%	3.09

	2009-10	API	% Proficient + ELA	% Proficient + Math	% Proficient + History SS	% Proficient + Science	PM Score
CCECHS		710	38.9%	18%	31.7%	49.0%	2.68