

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 the API 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 9th 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.

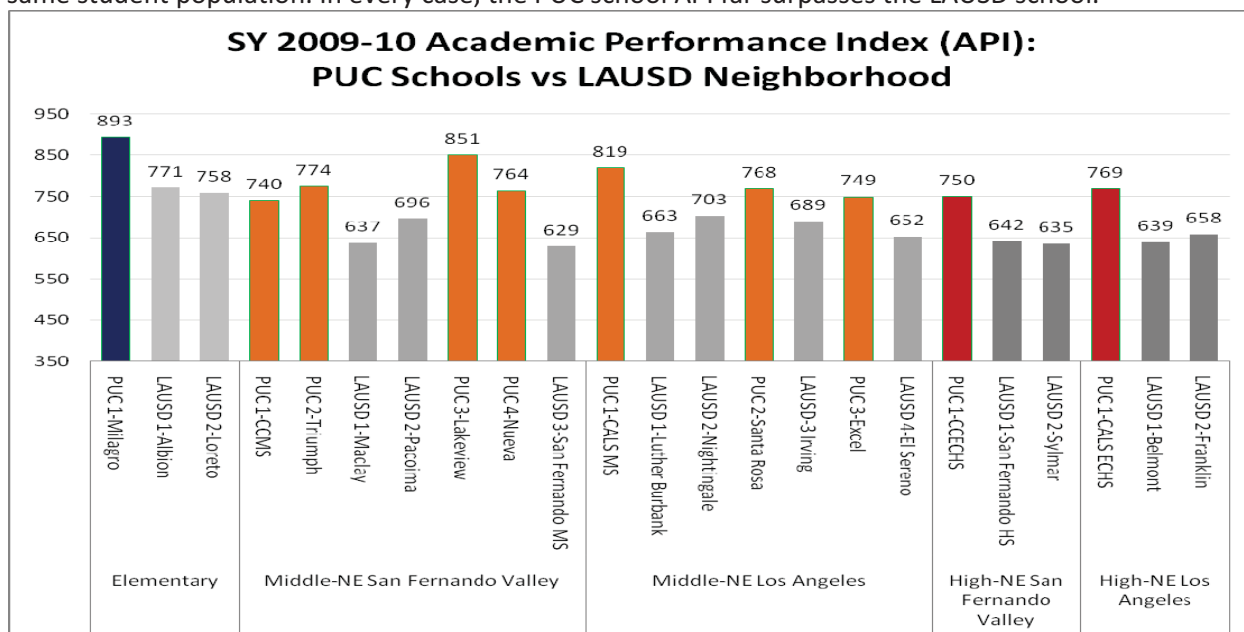
Our Home Office and organizational structure has demonstrated capacity to manage multiple schools and campuses, as it has done for the past ten years. We have had clean audits every year. Eight of our schools – all of which are at least 2 years old are WASC accredited, two schools that are in their second 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)

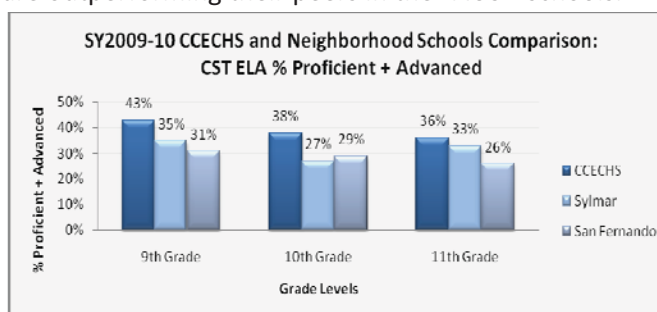
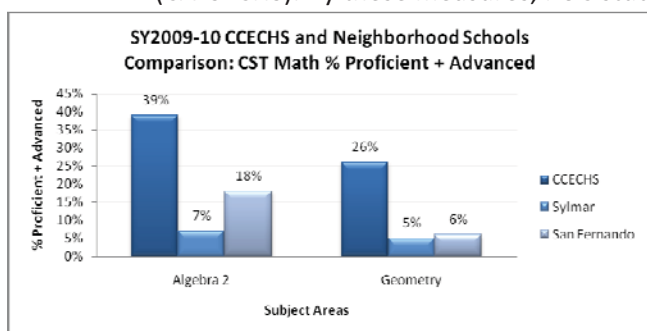
a. Provide evidence of the organization's successful management of academic and non-academic operations of schools/campuses in your portfolio (e.g., professional development, back-office support, facilities maintenance). Please include evidence from performance data assessments that measure student growth 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.

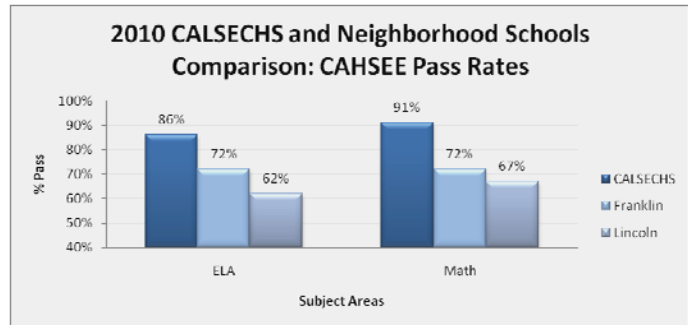
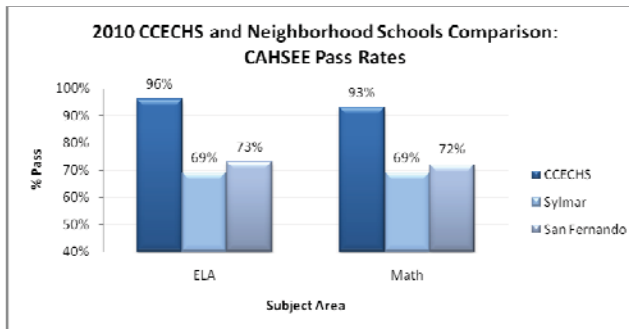
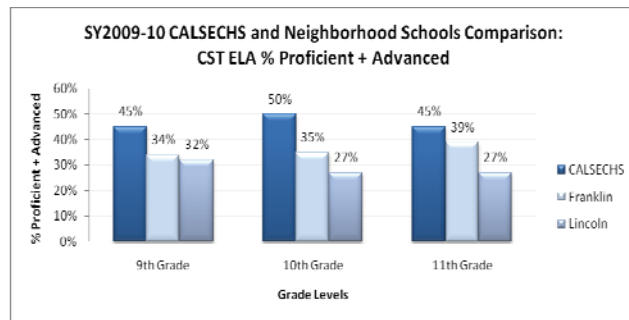
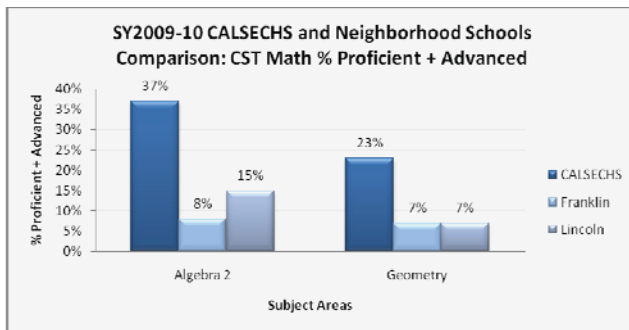
Evidence of PUC's successful management of academic and non-academic operations of its 12 schools to date can be found by analyzing student graduation rates (90%+), college acceptance and enrollment rates (90%+), performance on standardized tests and teacher-family-leader-stakeholder surveys. Clean audits, 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 neighborhood schools serving the same student population. In every case, the PUC school API far surpasses the LAUSD school.

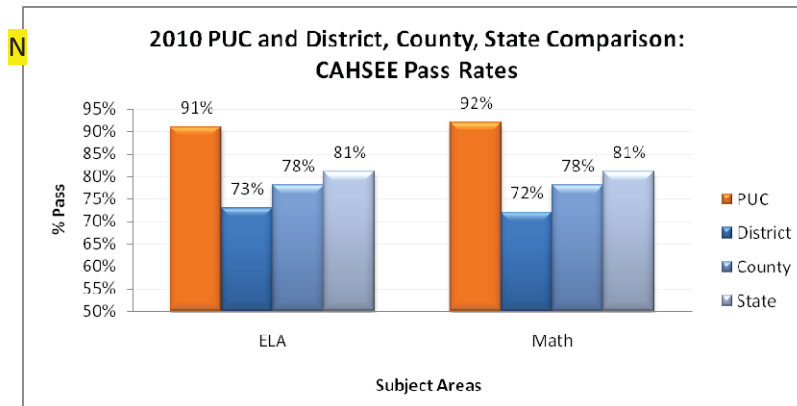


The tables below track student proficiency rates on CST ELA and Math exams, and CAHSEE pass rates, for Community Charter Early College High School (CCECHS) and CALS Early College High School (CALSECHS). By these measures, PUC students are outperforming their peers in the LAUSD schools.





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 graduation rates average 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. Nueva Esperanza Charter Academy achieved an API of 769 in its first year of operation, higher than any NE San Fernando Valley school has ever achieved during its first year. 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.

Cotinue 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 is 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 – Valley and consists of nine (9) regular members (maximum) plus one seat for the sponsoring district¹. 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-San Fernando Valley 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- San Fernando Valley's 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

¹ 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 the **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 Dr. Ref Rodriguez, Secretary Jacqueline Elliott, and additional board members, Ed Palmer and Dr. Jeanne Adams. Resumes of all Board members attest to the breadth and depth of their expertise and can be found in the appendix. 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. Dr. Rodriguez, co-founder of PUC and the Executive Director of the PUC-Northeast Los Angeles schools, brings a expertise in education, finance, and management. He is currently the President and CEO of *Partners for Developing Futures*, a social venture investment fund. Formerly the Co-Chief Executive Officer of PUC, he developed ten PUC schools with Dr. Elliot. 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.¹⁰ 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 the school can 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.**

	Year 1	Year 2	Year 3
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.

	FY 2008	FY 2009	FY 2010	Projected FY 2011
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>4,669,247</u>	<u>7,124,055</u>	<u>4,857,175</u>	<u>4,865,375</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

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, 4th grade, Bradoaks Elementary School, Monrovia, California

GATE Specialist, Monrovia Unified School District Office, Responsibilities included designing GATE plan for the district, designing curriculum for 5th and 6th 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 4th-6th 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 (1st-5th), 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, 4th 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, 7th and 8th 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 3rd – 5th 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, 5th 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

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 5th and 6th 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 2nd and 5th 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.

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. |
|------|---|

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

Experience	2008 - Present	PUC Schools	San Fernando Valley, CA
	Regional Director		
	<ul style="list-style-type: none">▪ <i>Coach and manage Principals and Assistant Principals of 4 charter middle schools and 3 charter high schools.</i>▪ <i>Create Standard Operating Procedures for growing charter organization.</i>		
	2007 - 2008	Youth Policy Institute	Pacoima, CA
	Leadership Consultant		
	<ul style="list-style-type: none">▪ <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>		
	2007 - 2008	PUC Schools	San Fernando Valley, CA
	Leadership Coach		
	<ul style="list-style-type: none">▪ <i>Coach Principals and Assistant Principals of 3 charter middle schools and 1 charter high school..</i>		
	2004 - 2007	Lakeview Charter Academy	San Fernando, CA
	Principal		
	<ul style="list-style-type: none">▪ <i>Instructional and operational leader of start-up charter middle school.</i>▪ <i>School achieved an API of 754 in the second year of operation.</i>		
	2003 - 04	Community Charter Middle School	San Fernando, CA
	Site Leader		
	<ul style="list-style-type: none">▪ <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>		
	2001 - 2003	Community Charter Middle School	San Fernando, CA
	Art Instructor / Arts Program Coordinator		
	<ul style="list-style-type: none">▪ <i>Designed visual arts curriculum for 6th – 8th grade.</i>▪ <i>Organized yearly Arts Showcases highlighting student work in music, visual and performing arts.</i>		
	1992 - 1994	University of Pennsylvania	Philadelphia, PA
	MFA		
	1991 - 92	University of the Arts	Philadelphia, PA
	BFA		
Education			

Glenda Rossana Alemán, Ph.D.

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 8th 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 6th 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

Languages	Java, SQL, PL/SQL, Matlab, C++, C, FORTRAN, VB, VBA
Internet Applications	J2EE (SERVLET, JSP, JDBC, RMI, JNDI), Web Services, Struts, Spring Framework, Hibernate
Web/Application Server	WebSphere, JBoss, Tomcat WebServer
Other Languages	Java Script, HTML, DHTML, XML/XSL, VoiceXML, AJAX
Database Application	Oracle 7.x/8x/9x/10, DB2, Sybase, MS-Access. SQL Server 2000
Operating Systems	Windows/98/NT/2000, MS-DOS 6.2, Mac OS, Linux, Unix
Control Tools	Rational ClearCase, CVS, MS Visio, MS Excel, MS PowerPoint
Other Tools	JUnit 3.8.1, Log4j 1.2.1
Reporting Tools	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 1st 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 3rd 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

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

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

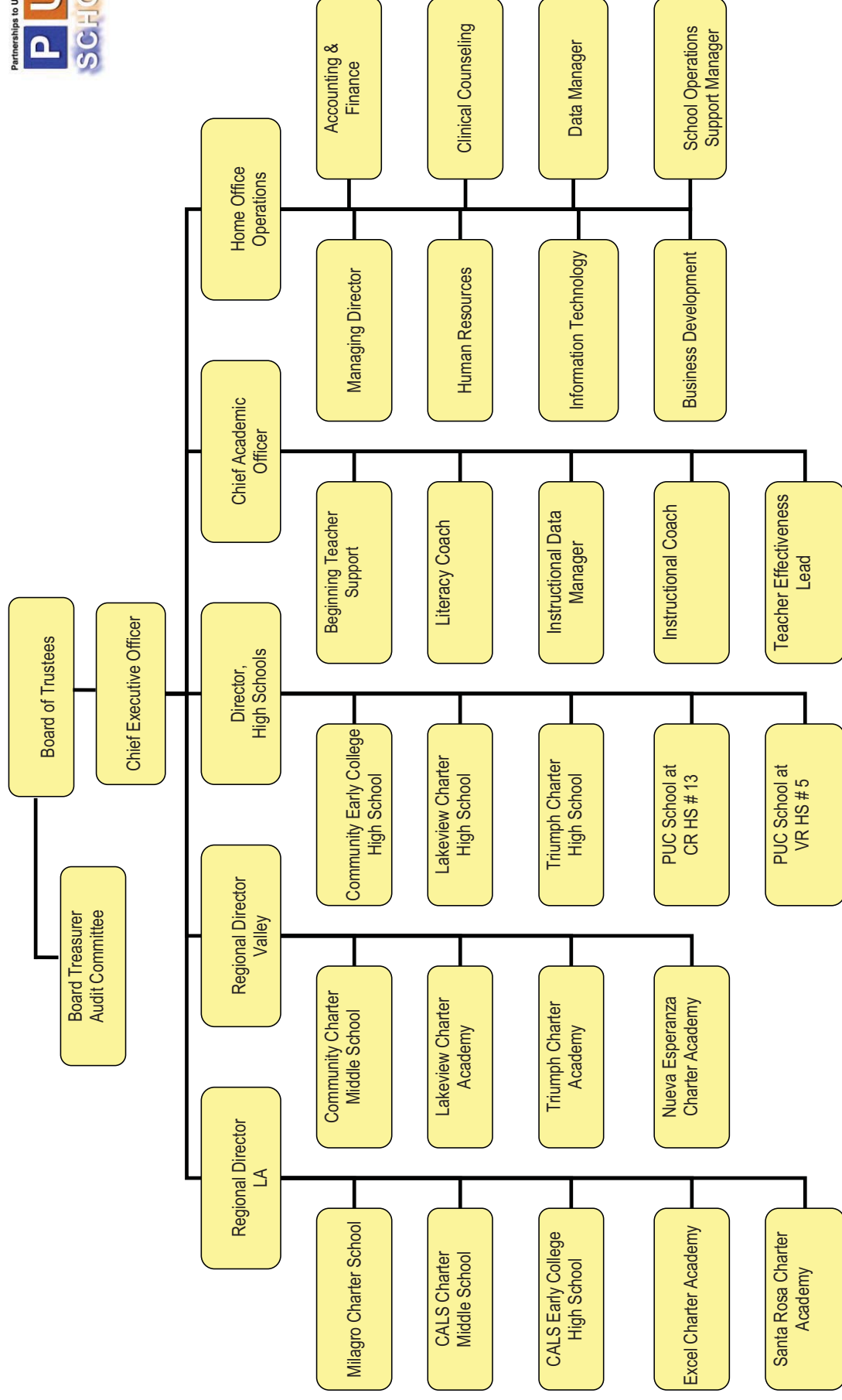
Development of Theory-Based Cultural Inclusion Strategies Effort: 33% /calendar yr
for Promoting Academic Achievement in the Multicultural High School Context
Institute for Educational Sciences (Wittig) 03/01/11 – 02/29/14 [this proposed request]
Social and Behavioral Context for Academic Learning \$140,000 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
1. Finance:													
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%
2. HR													
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%
3. Operations													
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%
4. Data Team /IT													
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											
5. Clinical Services													
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%
DIS Counseling Services													
DIS Counseling Services	% of services being provided	100%											
6. BIP Dev/ASES													
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 VALLEY

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**BYLAWS
OF
PARTNERSHIPS TO UPLIFT COMMUNITIES VALLEY**

**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 Lake View Terrace ("PUC LVT") and Partnerships to Uplift Communities Los Angeles ("PUC LA"). (This corporation, PUC LVT and PUC LA 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 Valley 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 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, unless the reduction or any amendment also provides for the removal of one or more of the specified trustees.

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 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 of 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 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 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 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 Los Angeles 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.

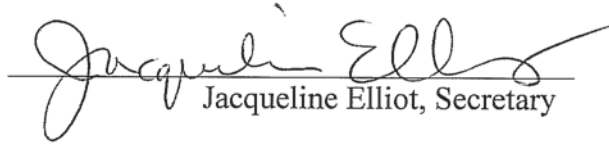
CERTIFICATE OF ADOPTION

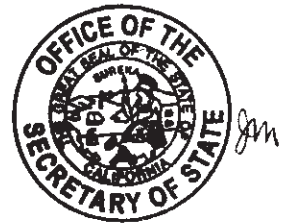
I, the undersigned, do hereby certify:

That I am the Secretary of Partnerships to Uplift Communities Valley.

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

A handwritten signature in cursive script that reads "Debra Bowen".

DEBRA BOWEN
Secretary of State

SEP 17 2008

**ARTICLES OF INCORPORATION
OF
PARTNERSHIPS TO UPLIFT COMMUNITIES VALLEY**

I.

The name of this corporation is Partnerships to Uplift Communities Valley.

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:

Jacqueline Elliot
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

6th grade CSUN summer programs for PUC students (1999 – present); Facilitated partnership with CSUN to design a college immersion program for all incoming 6th 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.

PROFESSIONAL EXPERIENCE

- 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

- 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

- 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.

CIVIC and PROFESSIONAL APPOINTMENTS

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.

FELLOWSHIPS

Fellow (2007 – 2009). Aspen Institute / New Schools Entrepreneurs for Public Education Program. Aspen, CO.

JOHN D. BIROC, Ph.D.

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

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

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.

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.

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*

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

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.

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.

Professional Affiliations

- * American Society for Group Psychotherapy and Psychodrama
- * California Association of Marriage and Family Therapists
- * National Association for Drama Therapy

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.

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.



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

CARDEN SPRINKLERS

PENN LITHO

LAWYERS TITLE COMPANY

)

MERUELO MADDUX PROPERTIES

Jeanne Ponticello Adams

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	<i>Golden Oak Service Award</i> , in recognition of outstanding service to children and youth, California Congress of Parents, Teachers and Students
2002	<i>California Professor of the Year</i> , Association of California School Administrators
2002	<i>Administrator of the Year</i> , Region XIII, Tri-Counties Association of California. School Administrators
2001	<i>Administrative Excellence Award</i> , Association of California School Administrators, Southern Ventura County
1995	<i>Distinguished Woman of the Year</i> , Soroptomist International, Ventura County
1994	<i>Celebrate Literacy Award</i> , International/California Reading Association
1993	<i>Educator of the Year</i> , Phi Delta Kappa
1992	<i>Migrant Education Award</i> for Service to Migrant Students and Families
1992	<i>Lifetime Achievement Award</i> , California State Parent/Teacher Association
1985	<i>Administrative Excellence Award</i> , Association of California School Administrators
1984	Elected to <i>Phi Delta Kappa</i> , Education Honor Society
1980	<i>Honorary Service Award</i> , Kamala School Parent/Teacher Association
1978	<i>Outstanding Administrator of the Year</i> , 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.

- | | | |
|-----------|---------------------------|---|
| 1995-2000 | <i>Associate Director</i> | Center for Partnerships for Educational Reform
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.

- | | | |
|-----------|------------------|--|
| 1992-1995 | <i>President</i> | Adams Group, Education and Management
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.

-6-

"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 21st 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 21st 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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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
<u>ASSETS</u>					
CURRENT ASSETS:					
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>
LONG-TERM ASSETS:					
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>
<u>LIABILITIES AND NET ASSETS</u>					
CURRENT LIABILITIES:					
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>
LONG-TERM LIABILITIES:					
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>
NET ASSETS:					
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

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Eliminations	Total
<u>REVENUES</u>					
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>
<u>EXPENSES</u>					
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
CASH FLOWS from OPERATING ACTIVITIES:				
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>
CASH FLOWS from INVESTING ACTIVITIES:				
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>
CASH FLOWS from FINANCING ACTIVITIES:				
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	<u>1,824,251</u>	<u>246,924</u>	<u>-</u>	<u>2,071,175</u>
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	<u>\$ 958,313</u>	<u>\$ 177,578</u>	<u>\$ -</u>	<u>\$ 1,135,891</u>

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
U.S. Department of Education						
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	<u>27,756</u>	<u>-</u>	<u>33,481</u>	<u>61,237</u>
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	<u>67,448</u>	<u>-</u>	<u>82,212</u>	<u>149,660</u>
Subtotal: Pass-Through Programs			<u>332,772</u>	<u>51,400</u>	<u>322,658</u>	<u>706,830</u>
Total U.S. Department of Education			<u>332,772</u>	<u>51,400</u>	<u>322,658</u>	<u>706,830</u>
U.S. Department of Agriculture						
Pass Through the California Department of Education						
Child Nutrition Programs	10.555	13391	<u>325,624</u>	<u>72,412</u>	<u>191,218</u>	<u>589,254</u>
Total U.S. Department of Agriculture			<u>325,624</u>	<u>72,412</u>	<u>191,218</u>	<u>589,254</u>
Total Expenditures for Federal Awards			<u>\$ 658,396</u>	<u>\$ 123,812</u>	<u>\$ 513,876</u>	<u>\$ 1,296,084</u>
Reconciliation to Federal Revenues						
Total Federal Program Expenditures			\$ 658,396	\$ 123,812	\$ 513,876	\$ 1,296,084
Revenues in excess of expenditures related to Federal programs:						
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	<u>348,161</u>	<u>91,206</u>	<u>278,872</u>	<u>718,239</u>
			<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><u>\$ 1,897,076</u></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><u>\$ 1,897,076</u></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><u>\$ 1,699,092</u></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

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>\$ 282,472</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><u>\$ 282,472</u></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

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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

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Eliminations	Total
<u>ASSETS</u>					
CURRENT ASSETS:					
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>
LONG-TERM ASSETS:					
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>
<u>LIABILITIES AND NET ASSETS</u>					
CURRENT LIABILITIES:					
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>
LONG-TERM LIABILITIES:					
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>
NET ASSETS:					
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

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Eliminations	Total
<u>REVENUES</u>					
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>
<u>EXPENSES</u>					
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>
CASH FLOWS from OPERATING ACTIVITIES:				
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>
CASH FLOWS from INVESTING ACTIVITIES:				
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>
CASH FLOWS from FINANCING ACTIVITIES:				
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 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, 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 a public auction and the proceeds are used to pay the delinquent amounts due; an excess is remitted, if claimed; to the taxpayer.

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:

	PUC Los Angeles	PUC Valley	PUC Lakeview Terrace	Total
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:

	Beginning Balance 7/1/2009	Additions	Disposals/ Adjustments	Ending Balance 6/30/2010
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)

	Beginning Balance 7/1/2009	Additions	Disposals/ Adjustments	Ending Balance 6/30/2010
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)

	Beginning Balance 7/1/2009	Additions	Disposals/ Adjustments	Ending Balance 6/30/2010
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 June 30,	STRS	
	Required Contribution	Percent Contributed
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

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
U.S. Department of Education						
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>
U.S. Department of Agriculture						
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>
Total Expenditures for Federal Awards			<u>\$ 2,400,182</u>	<u>\$ 982,424</u>	<u>\$ 1,555,161</u>	<u>\$ 4,937,767</u>
Reconciliation to Federal Revenues						
Total Federal Program Expenditures			\$ 2,400,182	\$ 982,424	\$ 1,555,161	\$ 4,937,767
Expenditures in excess of revenues related to Federal programs:						
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	1,530
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>\$ 597,647</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	49,050
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>\$ 597,647</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>

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*

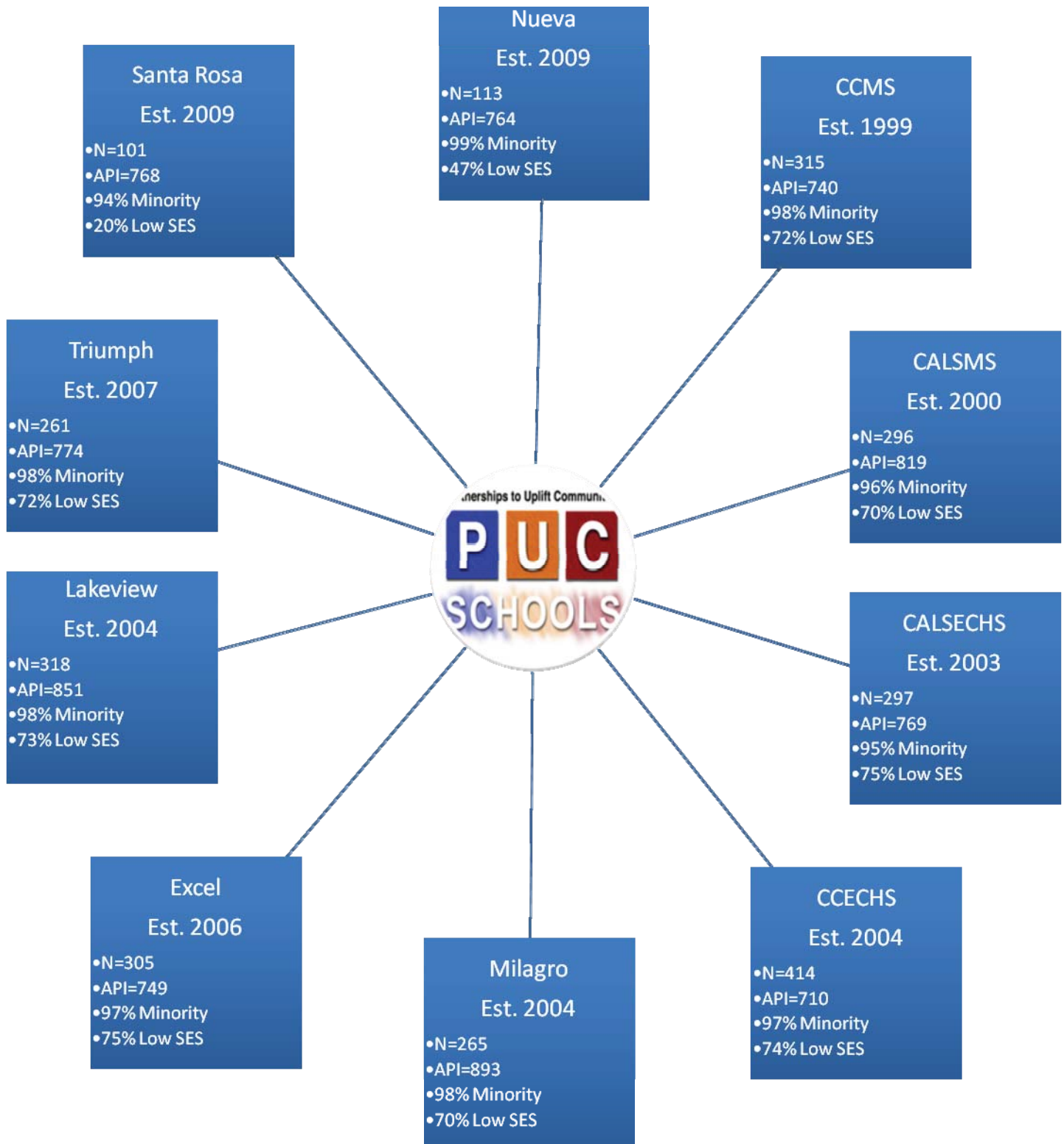
Identification of major programs:

<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.

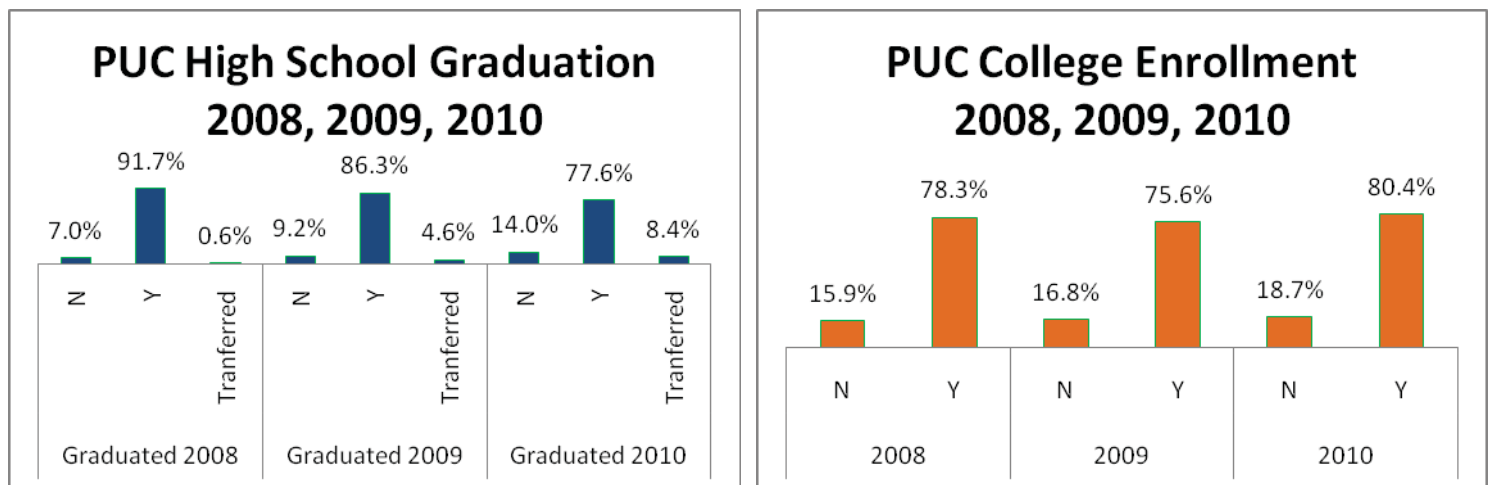


Figure 1: 2008-2010 Graduation Outcomes and College Enrollment for PUC Early College High Schools

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 2nd grade thru 11th 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 11th grade in 2010 were with PUC from at least 9th grade, and have data for each of the three time points through grade 11.

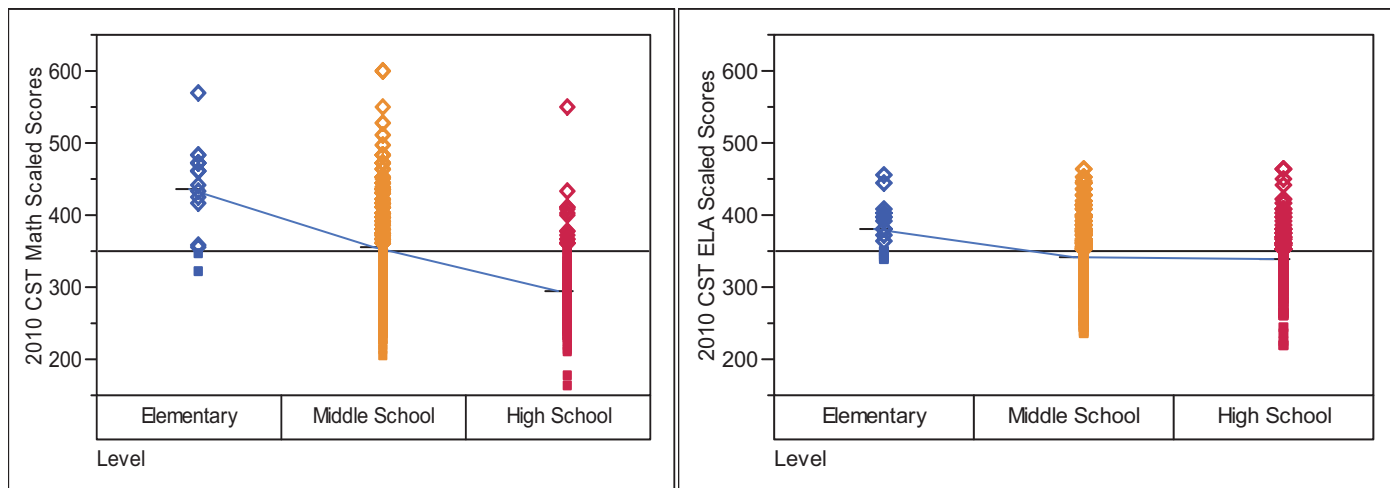


Figure 2a: 2010 CST Math Scores of Students who stayed with PUC **Figure 2b: 2010 CST ELA Scores of Students who stayed with PUC**

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 6th thru 8th grade, demonstrated proficiency in Math, but fell short in ELA. And, on average, PUC High School students, who stayed with PUC from at 9th thru 11th 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%

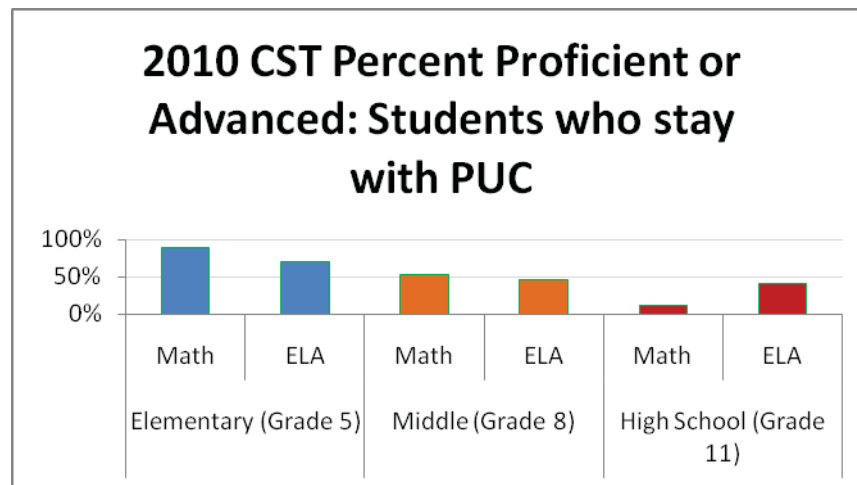


Figure 3: CST 2010 Percent Proficient or Advanced (students who stayed with PUC)

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 5th grade, 8th grade, or 11th 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%

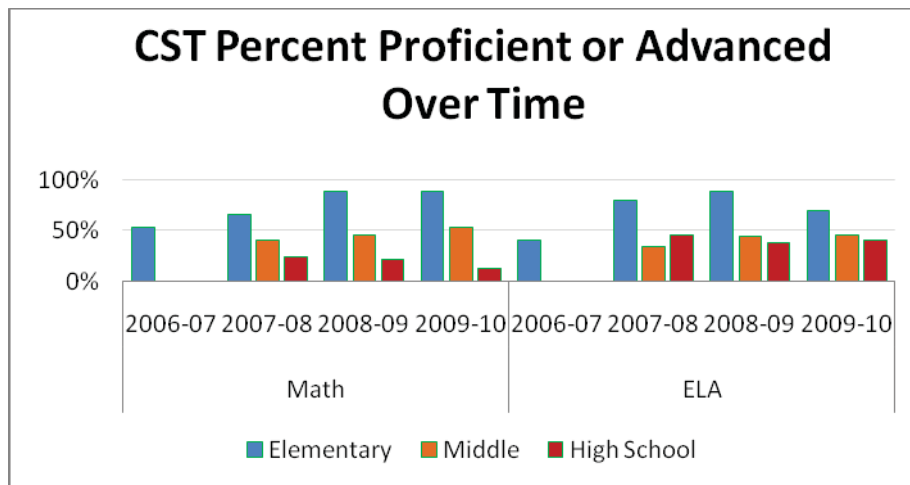


Figure 4: CST Percent Proficient or Advanced (students who stayed with PUC)

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 9th to 10th grade and from 10th to 11th grade, while in ELA; the pattern for High School appears to be slightly U-shaped: slight losses were observed from 9th to 10th grade and slight gains were observed from 10th to 11th 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>ELA</u>	0.71	0.03	0.44	0.13	0.22
<u>Math</u>	0.56	0.16	0.48	0.22	0.32
<u>History</u>	0.06	0.71	0.54	0.50	0.57
<u>Science</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.

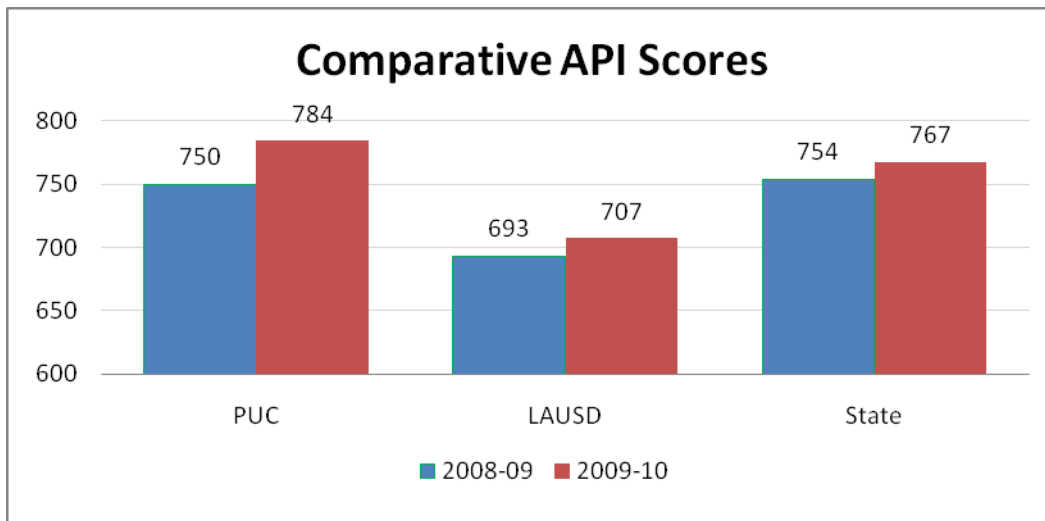


Figure 5: Average API Scores compared with LAUSD and the State

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.

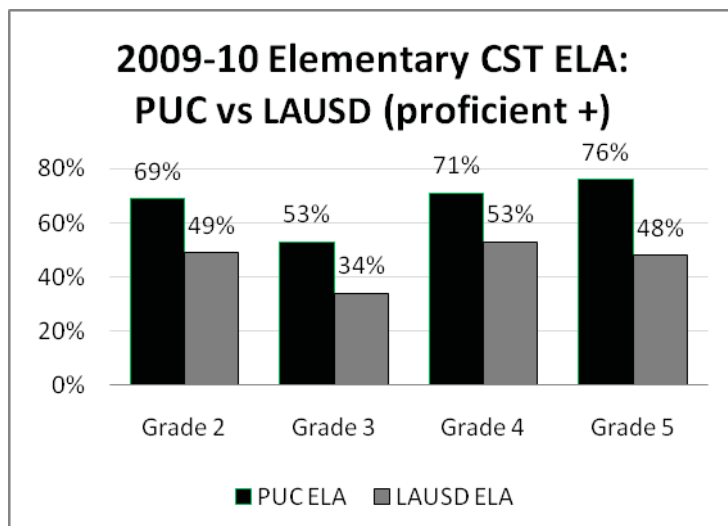


Figure 6A: Percent Proficient or Advanced in ELA PUC vs LAUSD

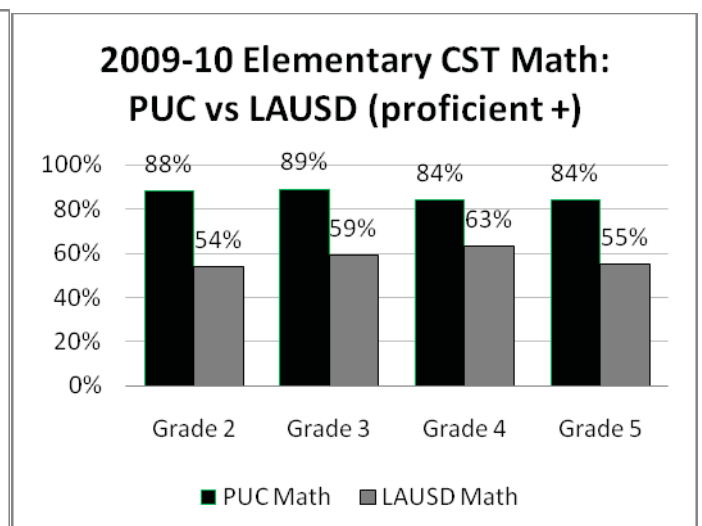
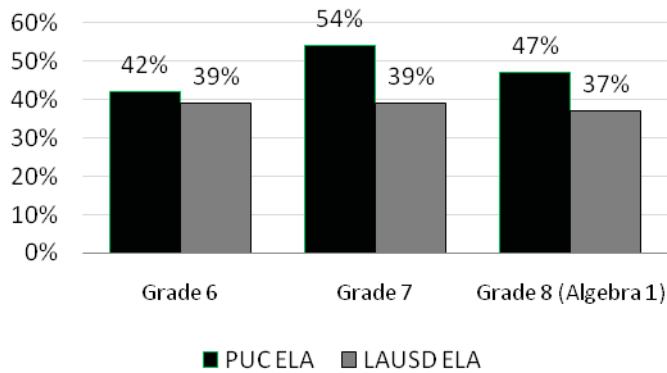


Figure 6B: Percent Proficient or Advanced in Math PUC vs LAUSD

**Middle School CST ELA:
PUC vs LAUSD (proficient +)**



**2009-10 Middle Schools CST Math:
PUC vs LAUSD (proficient +)**

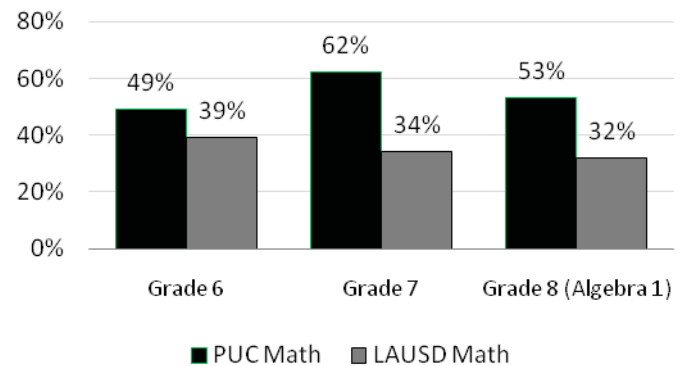
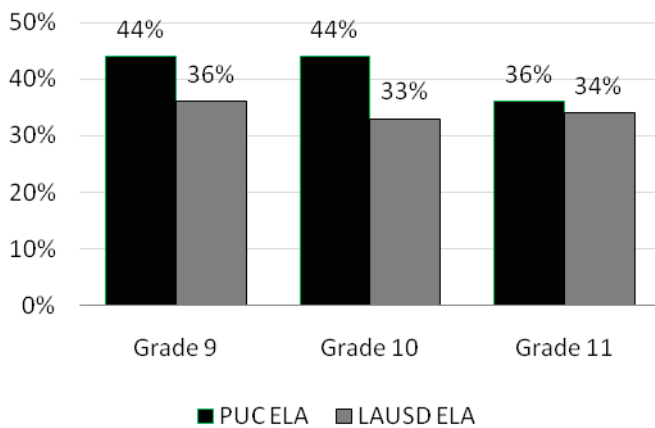


Figure 7A: Percent Proficient or Advanced in ELA PUC vs LAUSD

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 +)**

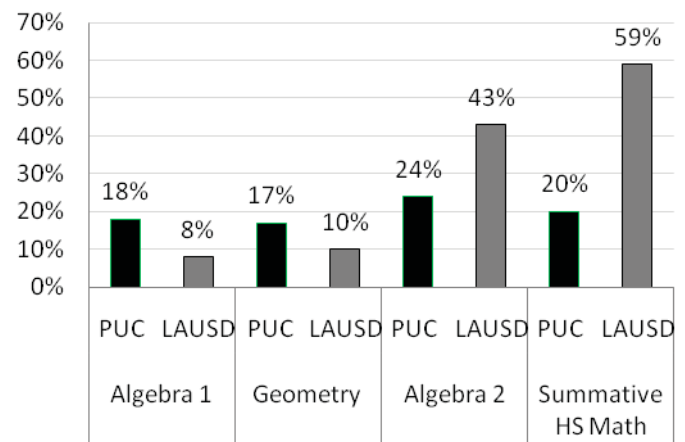


Figure 8A: Percent Proficient or Advanced in ELA PUC vs LAUSD

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