

**Journey School  
A California Public Charter School**

**Tuesday, February 27, 2024**

**REGULAR MEETING AGENDA**

**6:00 p.m.**

*At Journey School, 27102 Foxborough, Aliso Viejo, CA 92656*

*(949) 448-7232*

[www.journeyschool.net](http://www.journeyschool.net)

**BOARD MEMBERS:**

*Amy Capelle, Council President*

*Melissa Dahlin, Council Vice President*

*Margaret Moodian, Council Secretary*

*Michael Allbee, Board Treasurer*

*Jeannie Lee, Board Member*

**ADVISORY POSITIONS:**

*Faculty Advisor - TBD*

*Parent Cabinet Advisor - Cassie Kawling*

**INSTRUCTIONS FOR PRESENTATIONS TO THE COUNCIL BY PARENTS AND CITIZENS**

*Journey School welcomes your participation at the school's Council meetings. The purpose of a public meeting of the Council is to conduct the affairs of Journey School in public. We are pleased that you are in attendance. To assist you in the ease of speaking/participating in our meetings, the following guidelines are provided:*

1. *Agendas are available to audience members during the meeting and on the school website.*
2. *"Request to Speak" cards are available for all audience members who wish to speak prior to an agenda item or under the general category of "Public Comment." "Public Comment" time is set aside for members of the audience to raise issues that are not specifically on the agenda. However, due to public meeting laws, the Council can only listen to your issue, not discuss your issue, respond in substance or take action. These presentations are limited to five (5) minutes (ten (10) minutes if a translator is needed) and total time allotted to non-agenda items will not exceed thirty (30) minutes. The Council may give direction to staff to respond to your concern.*
3. *With regard to items that are on the agenda, you may specify that agenda item on your "Request to Speak" card and submit the card prior to an agenda item. The public comment period precedes presentations on that agenda item by staff and/or school committees, Council discussion, and deliberation. You will be given an opportunity to speak for up to five (5) minutes (ten (10) minutes if a translator is needed).*
4. *When addressing the Council, speakers are requested to state their name and adhere to the time limits set forth.*
5. *Audience members attending a meeting virtually are required to follow the guidelines specified in points 1 through 4 with the following exception noted: In lieu of a "Request to*

**Journey School**  
**A California Public Charter School**

*Speak” card, an audience member may utilize the chat function to indicate their name and a request to speak under the general category of “Public Comment” or at a specific agenda item. All other comments, questions, and dialogue entered into the chat will not be entered into public record and will not be responded to/addressed.*

**Notices:** *Journey does not discriminate on the basis of disability in the admission or access to, or treatment in employment in its programs or activities. Please notify the office at (949) 448-7232 twenty-four (24) hours prior to the date of the meeting for disability accommodations necessary in order to participate. Per California Government Code section 54957.5(b), Journey shall make materials that are part of the regular agenda packet available in the office and/or on the school’s website [www.journeyschool.net](http://www.journeyschool.net), without delay and at the same time, they are distributed to the Council.*

	<b>AGENDA ITEM</b>	<b>SPONSOR</b>	<b>EST. TIME</b>
1	<b>Call to Order and Roll Call</b>	Amy Capelle	6:00
2	<b>Inspirational Passage</b>	Cassie Kauwling	6:05
3	<b>Approval of Agenda*</b>  <b>NOTE: The order of the agenda may be changed without prior notice to the public.</b>	Amy Capelle	6:10
4	<b>PUBLIC COMMENT: Members of the public may contribute public comment.</b> <i>Reminder: See policy above for guidelines.</i>		6:15
5	<b>CONSENT AGENDA ITEMS: Items on Consent Agenda may be approved with one motion and vote for all but without discussion. If an item is to be discussed, it is removed from the Consent Agenda and moved to an Action Item immediately following the Consent Items.</b>  <b>A. Approval of Minutes*:</b> Minutes from regular meeting January 25, 2024.  <b>B. Amended Minutes*:</b> Minutes from regular meeting December 18, 2023.  <b>C. Engagement Of Audit Services*:</b> Approval of Clifton Larson Allen to serve as independent auditor for the year ended June 30, 2024.  <b>D. Statement of Work - Tax Exempt Returns and Filings*:</b> Approval of Clifton Larson Allen to prepare Journey’s federal and state returns and filings  <b>E. Second Interim Financial Report*:</b> Approval of second interim report, with fiscal information through January, 2024, due by March 15.  <b>F. Consolidated Application*:</b> Approval of ConApp reports for winter reporting cycle.		6:25
6.	<b>BOARD DEVELOPMENT and OVERSIGHT (Discussion/Action):</b>		6:35

**Journey School**  
**A California Public Charter School**

	<p>A. <b>California Charter School Conference:</b> Planning and strategy for attendance</p> <p>B. <b>School Director Evaluation Cycle*:</b> Review of informal goals for 2023-24 and check in regarding support needed to achieve goals.</p> <p>C. <b>Conflict of Interest Form 700:</b> Reminder of upcoming deadline for filing annual Form 700s.</p> <p>D. <b>Calendar of Annual Board Topics*:</b> Review and discussion.</p>	<p>Amy Capelle</p> <p>Amy Capelle</p> <p>Gaylen Corbett</p> <p>Amy Capelle</p>	
7	<p><b>INFORMATION ITEMS: Reports</b></p> <p>A. <b>Financial Update*:</b> Report on January financials</p> <p>B. <b>Faculty Update:</b> Update on Faculty activities.</p> <p>C. <b>Parent Cabinet Update:</b> Update on Parent Cabinet activities</p> <p>D. <b>Administrative Update:</b> Report from School Director, including update on school events, Employee Retention Credit, enrollment lottery, attendance, behavior and discipline, and Special Education.</p>	<p>Larry Tamayo</p> <p>TBD</p> <p>Cassie Kawling</p> <p>Gavin Keller</p>	7:15
8	<p><b>SCHOOL OPERATIONS: Discussion/Action</b></p> <p><b>A. 2024-2025 School Calendar and Instructional Minutes*:</b> Review and approval of draft school calendar and instructional minutes for the 2024-25 school year.</p> <p><b>B. 2023-2024 Local Control and Accountability Plan*:</b> A midyear update and review of progress towards goals, actions and expenditures.</p> <p><b>C. Comprehensive School Safety Plan*:</b> Review and approval of updates to the existing plan in response to recent updates to pertinent state requirements.</p> <p><b>D. Expanded Learning Opportunities Program*:</b> Review and approval of plan for a 6 week summer school/summer camp contract with Strategic Kids</p>	<p>Gavin Keller</p>	7:45
9	<p><b>Adjournment</b></p>	<p>Amy Capelle</p>	8:30

**Agenda publicly posted at Journey School on February 22, 2024, and on the school website at [www.journeyschool.net](http://www.journeyschool.net)**

*\*Items that are expected to have back up materials provided prior to or at the meeting are indicated with an asterisk. Other items may also have back up materials provided.*

**Journey School**  
**A California Public Charter School**

**REGULAR MEETING MINUTES - DRAFT**

**Thursday, January 25, 2024**  
**6:00 p.m.**

At Journey School, 27102 Foxborough, Aliso Viejo, CA 92656  
(949) 448-7232 [www.journeyschool.net](http://www.journeyschool.net)

**NOTE: Board members conducted the meeting in person at the Journey School campus and also live streamed the meeting via Zoom.**

	<b>AGENDA ITEM</b>
1	<p><b>Call to Order and Roll Call</b> - Amy called the meeting to order at 6:11 p.m. via Zoom. Amy submitted a request on January 22nd to attend the meeting via Zoom due to an illness. Amy stated that there are no adults in the room with her. Melissa made a motion to approve Amy's request. Margaret seconded the motion and it was unanimously approved.</p> <p>Amy Capelle, Council President - Present, participating via Zoom Melissa Dahlin, Board Vice President - Present Margaret Moodian, Council Secretary - Present Jeannie Lee, Board Member - Present Michael Allbee, Board Treasurer - Present</p>
2	<p><b>Inspirational Passage</b> Shelley shared the following passage by Johann Wolfgang Von Goethe : "I have come to the frightening conclusion that I am the decisive element. It is my personal approach that creates the climate. It is my daily mood that makes the weather. I possess tremendous power to make life miserable or joyous. I can be a tool of torture or an instrument of inspiration, I can humiliate or humor, hurt or heal. In all situations, it is my response that decides whether a crisis is escalated or de-escalated, and a person is humanized or de-humanized. If we treat people as they are, we make them worse. If we treat people as they ought to be, we help them become what they are capable of becoming."</p>
3	<p><b>Approval of Agenda*</b> Gavin noted the following change: There is no backup material for item 8A. Margaret made a motion to approve the agenda without backup documents for 8A. Jeannie seconded the motion and it was unanimously approved.</p>
4	<p><b>PUBLIC COMMENT:</b> Alicia Cordova attended the meeting via Zoom and submitted the following comments: Alicia thanked the members of the board for their work. She offered her support as a public voice and ear for the school. She asked for clarification of when the appropriate time to comment will be. Gavin asked if there is a particular item that she would wish to address. She stated that there was not an item in particular at this time.</p>

*Journey School*  
*A California Public Charter School*

5	<p><b>CONSENT AGENDA ITEMS: Items on Consent Agenda may be approved with one motion and vote for all but without discussion. If an item is to be discussed, it is removed from the Consent Agenda and moved to an Action Item immediately following the Consent Items.</b></p> <p><b>A. Approval of Minutes*:</b> Minutes from the meeting held on December 18, 2023.</p> <p><b>B. School Accountability Report Card (SARC)*:</b> Ratify annual SARC, reporting on 2022-2023 school year, to be submitted to CDE and posted on the school website by February 1, 2024.</p> <p><b>C. Updates to 2023-24 Staffing Plan*:</b> Ratification of changes to the Staffing Plan to meet current needs.</p> <p>Margaret made a motion to approve the consent agenda items. Mike seconded the motion and it was approved by all.</p>
6.	<p><b>BOARD DEVELOPMENT and OVERSIGHT (Discussion/Action):</b></p> <p><b>A. Recap of Alliance for Public Waldorf Conference:</b> Shelley shared that teacher Kristi Kilcollins attended the conference, and Miss Hellene was a presenter on one of the Alliance panels. The theme of the conference was "Getting Back to Our Roots," with a focus on keeping the Waldorf flame alive in the public sector. Both teachers felt refreshed and renewed by the experience, and also felt proud of Journey's accomplishments. Amy Capelle attended part of the virtual conference. Next year's conference will be held in Los Angeles.</p> <p><b>B. Board Development and Strategic Planning*:</b> Shelley reviewed the working draft of our self-study completed by Journey staff in preparation for the Alliance for Public Waldorf Education accreditation review process. Faculty members studied each core principal in depth and provided input. Our 8th grade teachers will be working on gathering student feedback. PEDCO will be setting goals based on the study which they will then bring back to faculty. Three to five action goals will be set for the next seven years. Once accreditation is achieved, the Alliance will check in with the school every seven years.</p> <p>Mike asked how many public Waldorf accredited schools there are. Shelley stated only two or three, as this is a relatively new process. She shared that this process will help the board by clearly defining the school's needs and goals. <b>Board members are reminded to complete the survey shared by Shelley.</b> The survey will be used for Journey's internal process of completing the accreditation. Amy asked how the alumni survey data from 2023 can play a role in the process. Shelley and board members agreed that the data would be very helpful. Melissa suggested adapting alumni survey questions to fit the survey for the Alliance process. Jeannie noted that faculty needs to be reminded about the reason and purpose of questions they are being asked as part of the accreditation process.</p> <p><b>C. Calendar of Annual Board Topics*:</b> The board reviewed the content and timing of this guiding document to ensure the board visits required and necessary topics on an annual or regular basis. Amy proposed that we put a spotlight on a selected topic each month. Topics might include Charter outcomes, achievement, social-emotional wellbeing, parent partnership, school safety, etc. This would help the board to ensure that at least one time per year they are discussing how we can</p>

*Journey School*  
*A California Public Charter School*

	<p>support our students, faculty, and families better. Time would be dedicated at each meeting to discuss the monthly topic. Gavin considered that we may need to scale back some other updates to make sure that this doesn't increase the length of the council meetings, and that many topics are already covered by existing monthly updates. Amy suggested that Gavin and Shelley review the existing document to see which month be the logical time for each topic. Margaret asked if there might be an alternative way to approach this. Mike suggested selecting topics that are not already featured in other presentations throughout the year. Jeannie and Melissa suggested cross checking to make sure that all important topics are covered, every year. Melissa offered to assist Amy in working on this project. Gavin will also be involved in the process.</p>
7	<p><b>INFORMATION ITEMS: Reports</b></p> <p>A. <b>Financial Update*</b>: Larry Tamayo from ExED shared a report on November and December financials and January Governor's Budget Proposal. Revenue is a little higher than expected which includes mental health funds coming directly to Journey. The interest in the school's investments is a little higher than expected, including funds in the County treasury and other investments. ADA has been slightly higher than budgeted, as well as unduplicated pupils, resulting in additional funds. We will have approximately 125 days of cash on hand by year end. Amy asked if funds invested are counted as cash. Larry stated that yes, those investments are considered cash since they are accessible.</p> <p>The state is continuing to support TK and ELOP programs, although funding might be reduced. Next year there will be less revenue throughout the state, and higher expenses. Universal meals will continue indefinitely with increased funding. Prop 28 Arts and Music Grant will be implemented this year and will continue into the future.</p> <p>From Larry's Budget Presentation: Journey School's deferred revenue includes ESSER III, ESSER III Learning Loss, and Expanded Learning Opportunity Grants expire 9/30/24; Educator Effectiveness, TK Planning Grants, and Arts, Music &amp; Instructional Materials Discretionary Block Grant funds expire 6/30/26. Learning Recovery Block Grant funds expire 6/30/28 and more restrictions may be placed on these funds, such as requiring them to be used for students most impacted by learning loss. The Governor has stated that he does not predict a recession and that he expects revenue to increase.</p> <p>Fortunately Journey has not spent the one-time funds and is not facing the fiscal cliff that other schools who have spent those funds are facing. Mike asked, what was the amount of the state's rainy day fund? Larry will research that.</p> <p><b>LCFF</b>: The Governor's Budget includes an estimated and fully funded cost-of-living adjustment (COLA) of 0.76% [originally 3.9%] for the Local Control Funding Formula (LCFF). However, to fully fund the LCFF, the Budget proposes withdrawing approximately \$2.8 billion from the Public School System Stabilization Account (PSSSA) in 2023-24, approximately \$2.2 billion in 2024-25, and using available reappropriation and reversion funding totaling \$38.6 million to support ongoing LCFF costs in 2024-25.</p> <p>B. <b>Faculty Update</b>: Jeannie shared an update on Faculty activities. Regarding illnesses in December, it hit our second grades particularly hard with many absences, as well as other classes. Now teachers are finishing up the first semester and finalizing grades. New student clubs will be starting for the second</p>

*Journey School*  
*A California Public Charter School*

semester. 8th grade performed Alice in Wonderland as their class play. Both 7th grade classes are performing a "Living Renaissance" as their performance. 7th and 8th grade students are excited about the theater elective led by Erin O'Neil. They will be performing the musical *Matilda*. Capistrano Valley High School has invited our theater group to visit their theater workshop on February 15th. There was a discussion about the positive aspects of clubs including building relationships between grade levels in middle school. Gavin stated that we have funds to support club activities if needed.

C. **Parent Cabinet Update:** Cassie Kauwling shared an update on Parent Cabinet activities. At a recent PC meeting, Gavin reviewed the LCAP. Parents provided feedback about the LCAP, which Gavin noted. They shared ideas for improvement and also shared their gratitude to Journey's administration. Another topic discussed was how to manage lunch times to ensure that students eat their lunches. Gavin pointed out that supervision is provided so that students can take as much time as is needed to eat their lunches. Read-a-Thon happens in February which typically raises over \$20k. Discussion was had about Journey socks and how to make Journey School socks available for teachers and staff. PC's auction is scheduled for April and they have a great volunteer who is organizing the event. PC is purchasing plates, glasses, silverware and napkins to have on hand for events such as teacher appreciation. PC is also donating and selling white garments that parents can use for May Faire.

D. **Administrative Update:** Gavin shared a report as follows:

**Facilities:** Admin is working with CUSD to repair leaks after recent rains. The key fob entry gate will be activated soon. The gate will be unlocked during drop off and pick up.

**School Events:** January has seen class plays and overnight trips. Medieval Games will take place soon on campus in February for our 6th graders, as well as those from other Waldorf schools in the area.

**Student Achievement:** There was a productive discussion with faculty about ways to improve achievement on assessments. Data was shared with teachers to show detailed data for their students that can be used to help them to assist their students with specific needs. The data was generated using Multiple Measures.

**Mental Health:** Gavin expressed gratitude to our counseling team, Rachel and Cadence, who work tirelessly to support our students. Staff members who oversee the Hearth also support our students on a daily basis. Mental health needs are becoming apparent more than in previous years. The nature of the Waldorf inspired education also builds a strong relationship between teachers and students that supports students' mental health. Our program allows students to shine in a variety of areas, even if they struggle in some areas. Amy asked if parents are aware of how much support students are receiving. Gavin stated that our Care Streams and counselors are doing a very good job of communicating with parents and our team often collaborates with parents in determining how best to help students; Parent partnership plays a key role. Jeannie suggested sharing this insight through social media to help the community understand the depth of help that is given at Journey. The support of counselors and our Director of Student Services has reduced the amount of time that Gavin and Shelley spend attending IEP meetings. Margaret shared that she would love to see some of Journey's social emotional programs be implemented at district schools.

**Art of Teaching Plans for the Summer:** PEDCO has been developing a summer program for Journey School teachers, and teachers from other Waldorf schools. Gavin explained that Journey typically pays for our teachers to travel to other schools for summer training. This will be a cost savings for the school.

*Journey School*  
*A California Public Charter School*

8

**SCHOOL OPERATIONS: Discussion/Action**

- A. Union Negotiations** - Journey Teacher Association shared that they do not wish to open any articles from the Collective Bargaining Agreement that they wish to renegotiate. This is why there were no backup materials for this item on the agenda.
- B. Renewal MOU and Charter Assurances Agreement with Capistrano Unified\*** - Gavin reviewed the agreement with our authorizing agency regarding various requirements for Journey School. He noted that starting in February we will be required to submit an audio recording of our council meetings within 10 days of the meeting. The MOU refers to a list of assurances. Our revisions were accepted by CUSD as noted by the backup materials shared with board members.

Mike made a motion to approve the Renewal MOU and Charter Assurances Agreement with Capistrano Unified School District. Melissa seconded the motion and it was unanimously approved.

- C. Comprehensive School Safety Plan\*** - The board reviewed and discussed Journey School's Comprehensive School Safety Plan, including updates to the plan as it relates to gun safety. Council discussed how often to message parents regarding the way to properly store firearms, and where would be the best place to obtain the verbiage for this type of message. There was a suggestion of sending the message out along with other safety messages, such as a pool safety message prior to summer. Amy suggested changing the word "proposes" to "strives" in the highlighted changes.

Margaret made a motion to approve the changes as noted above to the Comprehensive School Safety Plan. Melissa seconded the motion and it was unanimously approved.

- D. Overnight Camping Trips\*** - The board discussed overnight class trips including the financial implications of these trips for the school and parents, and reviewed the proposed plan for overnight field trips. Costs have been increasing around 10% per year, and scholarship requests have been increasing as well. Journey utilizes part of Parent Cabinet's annual donation for scholarships for overnight trips. The list of trips created by PEDCO will be a firm guiding document to provide classes with an understanding of which trip should be anticipated each year.

Jeannie Lee left at the conclusion of open session. Margaret made a motion to move into closed session. Melissa seconded the motion and it was approved by all. The board entered closed session at 9:03 p.m.

10

**Closed Session**

**A. Pursuant to Government Code § 54957.6: Public Employee Compensation**

**B. Pursuant to Government Code §54957.6: CONFERENCE WITH LABOR NEGOTIATORS: Update on the negotiations for 2023-24 CBA**

**Employee organization:** Journey Teachers' Association/CTA

**Agency designated representative:** Gavin Keller



***Journey School  
A California Public Charter School***

	<p style="text-align: center;"><b><i>RECONVENE TO OPEN SESSION:</i></b> <i>The meeting was reconvened to open session at 9:28 p.m.</i></p> <p style="text-align: center;"><b><i>PUBLIC REPORT ON ACTION TAKEN IN CLOSED SESSION:</i></b> <i>The board did not take action in closed session.</i></p>
11	<b><i>Adjournment</i></b>

*Agenda publicly posted at Journey School on January 22, 2024.*

*And on the school website at [www.journeyschool.net](http://www.journeyschool.net)*

*\*Items that are expected to have back up materials provided prior to or at the meeting are indicated with an asterisk. Other items may also have back up materials provided.*

## Memo

Date: February 27, 2024

To: Journey School Council

From: Gavin Keller

Re: Item 5B – Amended Minutes

Council Minutes from the meeting on December 18, 2023 were determined to be inaccurate and an amendment to the approved December 18, 2023 minutes is presented herein as item 5B for Council consideration and review.

The minutes attached have been amended to capture the detail of the discussion that occurred towards the end of agenda item 8C SELPA, namely that Journey School will continue to provide special education programming or equivalent for students with IEPs who are admitted through our lottery process. In becoming our own LEA as it relates to special education services, this may need to include development of specialized programming intended to meet needs for moderate to severe disabilities, whereas currently we do not have the freedom to develop specialized solutions to meet the needs of these students, rather we refer students to specialized programs operating in CUSD (as a current member of the CUSD SELPA). Students with IEPs who are not admitted into the program through our lottery process will be waitlisted.

This discussion was not accurately captured and helps to clarify the current approved minutes which states “...the school would have more freedom to create specialized solutions to meet the needs of students. If students apply to the school in need of those specialized services, we could create a wait list for students instead of automatically admitting them”.

**Journey School**  
**A California Public Charter School**

**Monday, December 18, 2023**  
**REGULAR MEETING MINUTES**  
*Approved January 25, 2024*

**6:00 p.m.**

*Held at Journey School, 27102 Foxborough, Aliso Viejo, CA 92656*  
*(949) 448-7232 [www.journeyschool.net](http://www.journeyschool.net)*

<b>AGENDA ITEM</b>	
1	<p><b>Call to Order and Roll Call</b> - The meeting was called to order at 6:11 p.m.</p> <p><i>Amy Capelle, Council President - Present</i>  <i>Melissa Dahlin, Board Vice President - Present</i>  <i>Margaret Moodian, Council Secretary - Present</i>  <i>Jeannie Lee, Board Member - Present</i>  <i>Michael Allbee, Board Treasurer - Present</i>  <i>Parent Cabinet Advisor - Cassie Kawling</i></p>
2	<p><b>Inspirational Passage:</b> <i>Melissa shared two inspirational passages. "closing the chapter of this year with reflection..." – each year teaches us something new.... recognizing challenges – moments of growth....</i></p>
3	<p><b>Approval of Agenda*:</b> <i>Margaret made a motion to approve the agenda. Melissa seconded and it was unanimously approved.</i></p>
4	<p><b>PUBLIC COMMENT:</b> <i>There were no members of the public present.</i></p>
5	<p><b>CONSENT AGENDA ITEMS:</b> <i>Amy pulled the October minutes from the consent agenda. — made a motion to items B and C on the consent agenda. — seconded and items B and C were approved.</i></p> <p><b>A. PULLED FROM CONSENT - Approval of Minutes*:</b> <i>Minutes from regular meeting, October 26, 2023. Amy stated that "30 days of cash on hand" should be changed to "130 days".</i></p> <p><b>B. First Interim Financial Report*:</b> <i>Approval of First Interim Report, based on financial information including budget on actuals.</i></p> <p><b>C. 2023-2024 Staffing Plan*:</b> <i>Approval of updates to the staffing plan.</i></p> <p><i>Margaret made a motion to approve the October 26, 2023 minutes with the change noted above. Mike seconded the motion and it was approved by all.</i></p>
6.	<p><b>BOARD DEVELOPMENT and OVERSIGHT (Discussion/Action):</b></p>

A. **Board Strategic Planning\***: Update on work with Alliance for Public Waldorf, self-study and peer review. Jeannie shared about the self-study process, which started back in June. Staff members started the process, PEDCO reviewed their work, and sent it back to the staff for further development. At this time the self-study is nearly complete. Gavin noted that it has been a healthy process to have the entire staff working together. The next step is for the Alliance to visit the school this spring to spend several days observing our program to make sure that our self-study is accurate compared to what is actually happening on campus. Following that visit, the Alliance will determine if we have met all requirements to be awarded accredited status.

Jeannie shared that one of the discussions that arose out of the self-study process is the need to work towards better communication and cooperation between main class teachers and specialty teachers. One of the issues has been main class teachers and the special ed team pulling students out of specialty classes. Discussions around these issues have been productive.

7 **INFORMATION ITEMS: Reports**

A. **Financial Update\***: Larry reported on October financials and first interim report. Our attendance has been higher than expected, and we have more students enrolled than what was projected, which will result in additional funding. In spite of this, Larry maintains the more conservative projections for the remainder of the year. The school is now receiving state mental health funds directly, instead of those funds being paid to our SELPA as they were in the past. We're on target with spending as projected this year. Invoices for housekeeping and some other items are coming in higher than expected. Net income is projected to be \$170k this year, which is higher than expected. The school currently has little under \$3 million. Amy asked if there's a penalty for taking money out of the investments before maturity. Mike stated that there's no penalty, but the school wouldn't get the full interest earned if funds are withdrawn early.

State Budget: The State is projecting a large budget deficit. As of October 27, the Franchise Tax Board (FTB) reported monthly tax collections of only \$14.9 billion—a shortfall from projections of more than \$27 billion. This shortfall and the one-month extension of the 2022 tax filing deadline caused the LAO to postpone the publication of its Fiscal Outlook to early December as multi-billion dollar discrepancies can have significant impacts on the overall State Budget and Proposition 98. The LAO is now projecting the 2024-25 statutory COLA to be approximately 1.00%—a significant decrease from the Newsom Administration's June 2023 estimates. We expect that the DOF, which has significantly more data now than in June 2023, will downgrade its projection when Governor Gavin Newsom presents his State Budget proposal on January 10, 2024. While the final statutory COLA won't be known until April 2024, the likelihood of it being 3.94% appears to be slim to none.

Fortunately, Journey School has some 'one-time funds' that we have not spent yet, while many schools have already spent those funds. Amy asked if Larry has seen other schools create endowment funds. Larry will look into it to see how they structured their endowment funds.

B. **Faculty Update**: Paul Breazeale did not attend the meeting, but shared the following written update on faculty activities:

Hello members of the Board,

I am sorry I couldn't be here in person tonight because I was looking forward to chatting with all of

you. If you saw me on campus today you saw I was wearing a mask. I think I got whatever sickness has been going around Journey, and I got no sleep last night because of it. Gavin and Jeannie said it would be ok for me to do a write up for my "faculty share out". If you have any further questions I'm happy to talk to you, and feel free to email me.

We as a faculty are currently in the busiest time of the year. The rush to the holidays is always filled with class parties, school assemblies, kids getting sick, kids getting excited, etc. So, to be completely honest the overwhelm is very real this time of year. From my perspective, despite the overwhelm, the morale among the staff remains fairly high.

In my current class we just finished our second block of the Ancient Hebrew Stories. We used Thinking Maps to plan our brainstorm, create a rough draft, edit it, and put the finished product in our Main Lesson Books. We also drew pictures of these stories.

In my math practice periods we are working our times tables in earnest. In ELA we are continuing to learn spelling rules and the proper way to make sentences. My weekly "Celebrations of Information" (Spelling tests) reinforce the skills we are learning.

I just wanted to share out a few personal observations and changes that I have really appreciated this year at school:

1.) The addition of Mary Luhrs has been nice. It has been great to have Gavin and Shelley more available for discipline and curriculum questions instead of hearing that "they're in an IEP".

2.) I know this isn't popular among all staff but I have personally loved the additions of the security fences. It's unfortunate to say, but in this day and age having a secure campus is important. I am hoping the key fob system will be ready asap. I hope that we continue to extend the fence heights around campus for the safety of all.

Thank you!

Paul Breazeale

C. **Parent Cabinet Update:** Cassie shared an update on Parent Cabinet activities. Harvest Faire was a huge success, in spite of some volunteer gaps. PC is training new volunteers to take over the event for those parents who are stepping down. Fairy Market was also a successful event with lots of joy from students and parent volunteers. Gavin attended the most recent PC meeting to share an overview of the school's LCAP. Cassie shared a comment that PC members should be invited to provide input every year. Cassie also mentioned that she received a request for notes from a recent Coffee Talk. She replied that notes are not taken or shared, and referred the parent to reach out to Gavin or Shelley with any questions. Cassie noted that the lack of staffing at the front desk makes the space less welcoming and challenging for parents who need assistance. Finally, Cassie inquired about having field trips planned out for each grade by PEDCO. Gavin clarified that the recommendations to be made by PEDCO will make sure that field trips are aligned with our curriculum. The plan will also take into consideration the financial costs that field trips impose on the school and on families. Administration and PEDCO are striving to ensure that trips are equitable for each grade level regardless of various factors.

D. **Administrative Update:** Gavin shared a report from administration including update as follows: Classes have participated in their lantern walks. Spiral Walks are happening now. Santa Lucia day happened last week. Amy suggested looking into purchasing fire blankets for safety. Gavin thanked Melissa for the alumni survey data, which has been shared with the community in our newsletter. Mike suggested making the next newsletter shorter.

Parent Education is going well, studying Conscious Discipline. The Zoom sessions have been fairly well attended. Lou Harvey Zahra provided a talk offering guidance on creative and conscious parenting. Admin has been having discussions about the possibility of offering our Waldorf Foundations program to parents.

The school opened an investment account per the board's direction, investing \$1.5 million in treasury bills. \$450k was invested in a 12 month treasury bill. The remaining funds were invested in 3, 6, and 9 month treasuries bills which will mature at these intervals. Mike stated that the average yield is 5.4% which could make the return around \$70k.

Our application for the Green Ribbon Award was declined since we already received the award previously, which has made us ineligible to win again. Mike suggested creating a flier highlighting our "green" practices that are implemented on a daily basis.

8 **SCHOOL OPERATIONS: Discussion/Action**

A. **2022-23 Audit Report\*:** Larry shared the review of the school's annual audit report for the previous fiscal year. He noted that there were no findings in the audit. There were a couple of adjustments. CLA recommends recognizing the Employee Retention Credit funds since they are subject to IRS review to determine eligibility. ERC for nonprofits is recognized as a grant. This changes the net income that was originally reported.

B. **Achievement Data Presentation\*:** Gavin reviewed the results of CAASPP testing, IlluminateEd achievement data and the California Dashboard. The school also participated in ELPAC for English Learners. There are no students who are eligible for alternative assessments. On the science test for 5th and 8th graders, the number of students exceeding standards increased, and the number of students who did not meet the standards decreased, although our science test scores were lower overall. School closures due to COVID in recent years may have negatively impacted these scores. We are now piloting a standardized science curriculum for 5th graders. Multiple Measures is very helpful to interpret this data. Through their software, we can see very detailed results for each student. Gavin has asked teachers to provide differentiated support for students based on the results of this testing. Margaret asked if students can opt out. Gavin clarified that yes, students can opt out, and he outlined how opting out negatively affects our school. All students are encouraged to participate in the testing process.

Our scores in math and language arts also declined. Testing cohorts were very different from 2022 to 2023. This year 311 students tested, while only 220 tested in 2022. We were growing enrollment when testing took place in 2022 resulting in 91 students less. Also this year our younger students have had less exposure to academic technology than our students did during the pandemic years. Mike proposed that computer skills could be taught in the younger grades to help correct this,

recognizing that there would be pros and cons to this solution. The other factor that affected test scores was attendance. Amy pointed out that our support staff has been reduced each year since the end of the pandemic. Gavin noted that the demographics of the school have changed in recent years which also affects test scores. Jeannie noted that since the recent inception of our honors program, many students are opting into more difficult math classes.

**Special Education Local Plan Agency (SELPA)\*:** Gavin reviewed the possibility of using El Dorado Charter SELPA as a potential option for future provision of special education services at Journey School. One of the conditions that CUSD has placed on Journey includes a significant increase in SPED encroachment to account for additional staffing to meet the needs of the school. The district seems to be supportive of Journey seeking SPED services elsewhere. All other charter schools in Orange County have left CUSD. At El Dorado, they are focused on SPED services. El Dorado SELPA would have the opportunity to review our school and determine if they are willing to provide us with services. L.A. County is another option. CCSA has recommended El Dorado. This would be similar to what CUSD is providing now, in terms of staffing. The Director of Student Support would be the administrator serving the SPED services division. The plan includes additional para-professionals. The cost is similar to what we are paying CUSD for their encroachment fees. Hiring and creating a program will be challenging, but Gavin feels that this is a better option than staying with CUSD. Jeannie asked if potential legal fees associated with this change are included. Gavin stated that yes, we have allotted funding to cover legal fees in case any lawsuits arise in the course of running our own special education program, however he expects that the number of lawsuits would decrease if we run our own program. ~~since the school would have more freedom to create specialized solutions to meet the needs of students. In becoming our own LEA as it relates to special education services, this may need to include development of specialized programming intended to meet needs for moderate to severe disabilities, whereas currently we do not have the freedom to develop specialized solutions to meet the needs of these students, rather we refer students to specialized programs operating in CUSD (as a current member of the CUSD SELPA). Students with IEPs who are not admitted into the program through our lottery process will be waitlisted. If students apply to the school in need of those specialized services, we could create a wait list for students instead of automatically admitting them.~~

The application process for El Dorado opens up in January. We would know by April if we are approved to join their SELPA. Gavin noted that if we change to another SELPA, this would be a material change and would require a revision of our charter. Margaret made a motion to authorize Gavin to apply to join El Dorado SELPA, and to notify CUSD that we are applying to another SELPA. Melissa seconded the motion and it was approved by all.

**C. Universal Transitional Kindergarten Programming\*:** Gavin shared an update of plans for transitional kindergarten (UTK) programs for the 2024-2025 school year. With this change to the program, we will be required to reduce the student to teacher ratio from 12:1 to 10:1. The proposal for our UTK program is to offer a one year program taking place from 11:00 a.m. to 3:00 p.m. There would be a maximum of 16 students per UTK. This would bring an additional \$100k of ADA funding.

**D. Purchase of Laptop Computers for Faculty Use\*:** Gavin reviewed the request to purchase laptop computers using approved government funding. The school will order and pay for the laptops, and then be reimbursed by the funding program. Margaret made a motion to approve the purchase of 34 laptop computers and other technology for faculty use, not to exceed the cost of the grant funding. Melissa seconded the motion and it was approved by all.

	<p><i>Jeannie made a motion to conclude the public session and enter closed session. Melissa seconded the motion and it was unanimously approved.</i></p>
9	<p><b>CLOSED SESSION</b> - <i>The board entered closed session at 9:07 p.m.</i></p> <p><b>A.</b>     <i>Pursuant to Government Code § 54956.9: Conference with legal counsel regarding existing or anticipated litigation</i></p> <p><b>B.</b>     <i>Pursuant to Government Code § 54957: Public Employee Compensation, Executive Director</i></p> <p><i>The board exited the closed session at 9:20 p.m. The following actions were taken by the board:</i></p> <ul style="list-style-type: none"> <li>- <i>The board approved bringing the MOU proposal to CUSD.</i></li> <li>- <i>The board approved a specific COLA bonus for the Executive Director and administrative staff at his discretion.</i></li> </ul>
11	<p><b>Adjournment</b> - <i>Jeannie made a motion to adjourn the meeting. Mike seconded the motion and it was unanimously approved.</i></p>

*Agenda publicly posted at Journey School on Thursday, December 13, 2023*

*And on the school website at [www.journeyschool.net](http://www.journeyschool.net)*

*\*Items that are expected to have back up materials provided prior to or at the meeting are indicated with an asterisk. Other items may also have back up materials provided.*





## Statement of Work - Audit Services

January 23, 2024

This document constitutes a statement of work ("SOW") under the master service agreement ("MSA") dated January 14, 2022, or superseding MSA, made by and between CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") and Journey School ("you," "your," or "the entity"). We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services CLA will provide for the entity as of and for the year ended June 30, 2024.

Derrick DeBruyne is responsible for the performance of the audit engagement. Per Education Code Section 41020(f)(2), there is a limit of six consecutive years for any firm where the principal of the audit and the reviewing principal have been the same in each of those years. This is the sixth consecutive year Derrick DeBruyne will be the engagement principal.

### **Scope of audit services**

We will audit the financial statements of Journey School, which comprise the financial statements identified below, and the related notes to the financial statements (collectively, the "financial statements") as of and for the year ended June 30, 2024.

The statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

We will also evaluate and report on the presentation of the following supplementary information accompanying the financial statements in relation to the financial statements as a whole:

Schedule of Instructional Time

Schedule of Average Daily Attendance

Reconciliation of Annual Financial Report With Audited Financial Statements

The following supplementary information accompanying the financial statements will not be subjected to the auditing procedures applied in our audit of the financial statements and our auditors' report will not provide an opinion or any assurance on that information:

Local Education Agency Organization Structure

## **Nonaudit services**

We will also provide the following nonaudit services:

- Preparation of your financial statements and the related notes.
- Preparation of the supplementary information.
- Preparation of adjusting journal entries, as needed.
- Preparation of the informational tax returns.

## **Audit objectives**

The objectives of our audit of the financial statements are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP). Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

Our audit will be conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and the 2023-2024 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel (State Audit Guide). Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. Our audit will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinions.

We will also perform procedures to enable us to express an opinion on whether the supplementary information (as identified above) accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

We will issue a written report upon completion of our audit of your financial statements.

Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial

statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

We will also provide a report (which does not include an opinion) on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*. The report on internal control over financial reporting and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the entity is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

The state compliance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the State Audit Guide.

### **Auditor responsibilities, procedures, and limitations**

We will conduct our audit in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* and the State Audit Guide.

Those standards require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and evaluate whether audit evidence obtained is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements,

including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

- Conclude, based on our evaluation of audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Management override of internal controls
- Improper revenue recognition

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS and Government Auditing Standards. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected. Because the determination of waste and abuse is subjective, Government Auditing Standards do not require auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential.

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards and *Government Auditing Standards* and the State Audit Guide.

As part of obtaining reasonable assurance about whether the financial statements are free of material

misstatement, we will perform tests of the entity's compliance with the provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

We will include in our report on internal control over financial reporting and on compliance relevant information about any identified or suspected instances of fraud and any identified or suspected noncompliance with provisions of laws, regulations, contracts, or grant agreements that may have occurred that are required to be communicated under *Government Auditing Standards*.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

### **Management responsibilities**

Our audit will be conducted on the basis that you (management and, when appropriate, those charged with governance) acknowledge and understand that you have certain responsibilities that are fundamental to the conduct of an audit.

You are responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP.

Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for one year after the date the financial statements are available to be issued.

You are responsible for the design, implementation, and maintenance of effective internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including evaluating and monitoring ongoing activities and safeguarding assets to help ensure that appropriate goals and objectives are met. You are responsible for the design, implementation, and maintenance of internal controls to prevent and detect fraud; assessing the risk that the financial statements may be materially misstated as a result of fraud; and for informing us about all known or suspected fraud affecting the entity involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the entity received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for implementing systems designed to achieve compliance with applicable laws and regulations and the provisions of contracts and grant agreements; identifying and ensuring that the entity complies with applicable laws, regulations,

contracts, and grant agreements; and informing us of all instances of identified or suspected noncompliance whose effects on the financial statements should be considered. You are responsible for taking timely and appropriate steps to remedy any fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements that we may report.

You are responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, including amounts and disclosures, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters, and for the accuracy and completeness of that information (including information from within and outside of the general and subsidiary ledgers); (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the State Audit Guide; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence.

You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

Management is responsible for the preparation of the supplementary information in accordance with U.S. GAAP. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. You agree to provide us written representations related to the presentation of the supplementary information.

Management is responsible for providing us with a written confirmation concerning representations made by you and your staff to us in connection with the audit. During our engagement, we will request information and explanations from you regarding, among other matters, the entity's operations, internal control, future plans, specific transactions, and accounting systems and procedures. The procedures we will perform during our engagement and the conclusions we reach as a basis for our report will be heavily influenced by the representations that we receive in the representation letter and otherwise from you. Accordingly, inaccurate, incomplete, or false representations could cause us to expend unnecessary effort or could cause a material fraud or error to go undetected by our procedures. In view of the foregoing, you agree that we shall not be responsible for any misstatements in the entity's financial statements that we may fail to detect as a result of misrepresentations made to us by you.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies to us of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the "Audit objectives" section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

### **Responsibilities and limitations related to nonaudit services**

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

### **Use of financial statements**

Should you decide to include or incorporate by reference these financial statements and our auditors' report(s) thereon in a future private placement or other offering of equity or debt securities, you agree that we are under no obligation to re-issue our report or provide consent for the use of our report in such a registration or offering document. We will determine, at our sole discretion, whether we will re-issue our report or provide consent for the use of our report only after we have performed the procedures we consider necessary in the circumstances. If we decide to re-issue our report or consent to the use of our report, we will be required to perform certain procedures including, but not limited to, (a) reading other information incorporated by reference in the registration statement or other offering document and (b) subsequent event procedures. These procedures will be considered an engagement separate and distinct from our audit engagement, and we will bill you separately. If we decide to re-issue our report or consent to the use of our report, you agree that we will be included on each distribution of draft offering materials and we will receive a complete set of final documents. If we decide not to re-issue our report or decide to withhold our consent to the use of our report, you may be required to engage another firm to audit periods covered by our audit reports, and that firm will likely bill you for its services. While the successor auditor may request access to our workpapers for those periods, we are under no obligation to permit such access.

If the parties (i.e., you and CLA) agree that CLA will not be involved with your official statements related to municipal securities filings or other offering documents, we will require that any official statements or other offering documents issued by you with which we are not involved clearly indicate that CLA is not involved with the contents of such documents. Such disclosure should read as follows:

CliftonLarsonAllen LLP, our independent auditor, has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. CliftonLarsonAllen LLP also has not performed any procedures relating to this offering document.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website or submitted on a regulator website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information in the electronic site with the original document.

We may issue preliminary draft financial statements to you for your review. Any preliminary draft financial statements should not be relied on or distributed.

### **Engagement administration and other matters**

We expect to begin our audit on approximately April 1, 2024.

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. A list of information we expect to need for our audit and the dates required will be provided in a separate communication.

We will provide copies of our reports to the entity; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing confidential or sensitive information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to California Department of Education, California State Controllers Office, and authorizer(s), or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies or electronic versions of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the California Department of Education, California State Controllers Office, and authorizer(s). If we are aware that a federal or state awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Professional standards require us to be independent with respect to you in the performance of these services. Any discussion that you have with our personnel regarding potential employment with you could impair our independence with respect to this engagement. Therefore, we request that you inform us prior to any such discussions so that we can implement appropriate safeguards to maintain our independence and objectivity. Further, any employment offers to any staff members working on this engagement without our prior knowledge may require substantial additional procedures to ensure our independence. You will be responsible for any additional costs incurred to perform these procedures.

Our audit engagement ends on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific SOW for that service.

Government Auditing Standards require that we make our most recent external peer review report publicly available. The report is posted on our website at [www.CLAconnect.com/Aboutus/](http://www.CLAconnect.com/Aboutus/).

## **Fees**

Our professional fees are outlined in the table below:



<b>Service</b>	<b>Fee</b>
Financial Statement Audit	\$17,000
Implementation of the New Risk Auditing Standards which includes an increase in information technology testing	2,000
Preparation of Informational Tax Returns	4,000
Technology and Client Support Fee	1,150
Total	24,150

Additional state compliance procedures as required in the 2023-2024 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel will be billed as out-of-scope.

We will also bill for expenses including travel, internal and administrative charges, and a technology and client support fee of five (5%) of all professional fees billed. Our fee is based on anticipated cooperation from your personnel and their assistance with locating requested documents and preparing requested schedules. If the requested items are not available on the dates required or are not accurate, the fees and expenses will likely be higher. There is a ten percent withholding clause per Education Code 14505.

Professional fees will be billed as follows:

<b>Progress bill to be mailed on</b>	<b>Amount to be billed</b>
Upon execution of the SOW	One-third of our professional fees
Upon the commencement of substantive procedures	One-third of our professional fees
Issuance of draft report(s)	One-third of our professional fees

### **Unexpected circumstances**

We will advise you if unexpected circumstances require significant additional procedures resulting in a substantial increase in the fee estimate.

**Changes in accounting and audit standards**

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the SOW increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

**Agreement**

We appreciate the opportunity to provide to you the services described in this SOW under the MSA and believe this SOW accurately summarizes the significant terms of our audit engagement. This SOW and the MSA constitute the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA related to audit services. If you have any questions, please let us know. Please sign, date, and return this SOW to us to indicate your acknowledgment and understanding of, and agreement with, the arrangements for our audit of your financial statements including the terms of our engagement and the parties' respective responsibilities.

Sincerely,

**CliftonLarsonAllen LLP**

**Response:**

This letter correctly sets forth the understanding of Journey School.

CLA  
CLA

*Derrick DeBruyne*

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Derrick DeBruyne, Principal

SIGNED 2/17/2024, 10:04:10 AM MST

**Client**  
Journey School

SIGN:

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Gavin Keller

DATE:

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# Entity Tax Compliance Statement of Work

CLA Client ID:A275641

Date: January 27, 2024

Journey School

27102 Foxborough, Aliso Viejo, CA, 92656-3377, United States

## Statement of Work - Tax Exempt Returns and Filings

This document constitutes a statement of work (“SOW”) under the master service agreement (“MSA”) dated January 14, 2022, or any superseding MSA, made by and between CliftonLarsonAllen LLP (“CLA,” “we,” “us,” and “our”) and Journey School (“you,” “your,” or “the organization”). The purpose of this SOW is to confirm our understanding of the scope of services, responsibilities, limitations, and related terms of our engagement for the year ended June 30, 2024.

### Our responsibility to you

We will prepare the entity's federal and state returns and filings as defined herein in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible.

We will not audit or otherwise verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

### Your responsibilities

It is your responsibility to provide us with all of the information needed to prepare complete and accurate returns and filings. We will have no obligation to prepare the returns and filings until you have provided such information to us. It is your responsibility to comply with all foreign jurisdiction filing requirements. We have no obligation to prepare returns for foreign jurisdictions.

CLA requires that you provide information 60 days prior to the filing deadline. If you provide information after that date, we may be unable to complete the return(s) by the original filing deadline and may need to file an extension. If an extension is filed and information is not provided by 60 days prior to the extended filing deadline, we may be unable to complete your return(s) by the extended due date. Failure to timely file your return(s) or to file for an extension can result in penalties which can be substantial.

The United States Supreme Court ruled in *South Dakota versus Wayfair* that physical presence is no longer

required to establish nexus for sales tax. This ruling may have broad implications, even beyond sales tax, as to where an entity is subject to tax. Please note that if the entity had a taxable presence in more than one jurisdiction, such as an employee or agent within the jurisdiction, any tangible property owned or rented within the jurisdiction, or if the entity exceeds any applicable economic nexus thresholds, the entity, its owners, or related entities may be subject to state or local income, sales, use, franchise, or gross receipts tax in that jurisdiction depending upon the particular facts. It is the entity's responsibility, not CLA's, to determine if assistance is needed in deciding whether the entity, its owners, or related entities may be liable for income, sales, use, franchise, or gross receipts tax, or have a filing requirement in the various state or local jurisdictions.

It is important for you to identify any ownership OR signature authority over a foreign bank account or other foreign financial assets which includes but is not limited to foreign: stocks, mutual funds, partnerships, bonds, retirement accounts, estates, trusts, annuities, swaps, and derivatives. Failure to disclose penalties can be significant, starting at \$10,000 and can be upwards of 50 percent of the value of the asset. Please provide account statements if you have any foreign account ownership or signature authority. Note that these rules do not apply to foreign investments held by U.S. mutual funds. In addition, ownership in a foreign business entity (association, corporation, disregarded entity, or partnership) could trigger additional U.S. foreign informational reporting requirements. These reporting requirements require the disclosure of ownership, financial information, and related-party transactions. Failure to properly disclose ownership, related-party transactions, and the required information could trigger a penalty of up to \$25,000 penalty per filing. We cannot be held responsible if you fail to identify or provide such information to us.

For all nonattest services we may provide to you, including these tax services, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services performed; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services. You are responsible to carefully review the returns and filings that we prepare on your behalf before they are signed and submitted to tax authorities. We will advise you with regard to tax positions taken in the preparation of the returns and filings, but the responsibility for the returns and filings remains with you.

### **Section 174 capitalization requirement**

Research and experimental ("R&E") expenditures under IRC Section 174 are required to be capitalized and amortized. In the case of domestic R&E expenditures, the amortization period is 5 years, and in the case of foreign R&E expenditures the amortization period is 15 years. In order to comply with the new law, your R&E expenditures under Section 174 must be identified and properly categorized. Additionally, the IRS is requiring taxpayers with Section 174 expenditures to file a change in accounting method with their tax return, which may be done this tax year on a Form 3115 or equivalent statement. We will bill at our standard hourly rates for services related to this law change.

### **Beneficial ownership information reporting**

Beginning in 2024 under the Corporate Transparency Act (CTA), certain entities organized in the U.S.

(including entities that are disregarded for federal income tax purposes) and foreign entities doing business in the U.S. are required to report information to the Financial Crimes Enforcement Network (FinCEN) as to their beneficial ownership. The report must provide each beneficial owner, each company applicant and other required information. Entities subject to the beneficial ownership information (BOI) reporting include a corporation, limited liability company, or any other entity created by the filing of a document with the secretary of state or similar office under state, Tribal or foreign country law. Note that some entities are exempt from the BOI reporting requirements (including many nonprofits and certain large operating companies).

**It is your responsibility to prepare and submit any BOI report to FinCEN that is required under the CTA.** We have no obligation to identify any filing requirements or provide any services related to BOI reporting.

### **Tax examinations**

All returns and filings are subject to potential examination by the IRS and state taxing authorities. In the event of an examination, we will be available, at your request, to assist or represent you. Services in connection with tax examinations are not included in our fee for preparation of your returns and filings. Our fee for such services will be billed to you, along with any direct costs.

### **Record retention**

You are responsible for retaining all documents, records, canceled checks, receipts, or other evidence in support of information and amounts reported on your returns and filings. These items may be necessary in the event a taxing authority examines or challenges your returns or filings. These records should be kept for at least seven years. Your copy of the returns and filings should be retained indefinitely.

If carryover item(s) exist (e.g., capital loss, net operating loss, tax credits, etc.), you should retain the supporting records related to the carryover item(s) until the item has either been utilized (and the statute of limitations associated with the year of utilization has expired) or the carryforward period has expired.

In preparing the returns and filings, we rely on your representation that you understand and have complied with these documentation requirements. You are responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets, and for the substantial accuracy of your financial records.

All of the records that you provide to us to prepare your returns and filings will be returned to you after our use. Our working papers, including any copies of your records that we chose to make, are our property and will be retained by us in accordance with our established records retention policy. This policy states, in general, that we will retain our working papers for a period of seven years. After this period expires, our working papers and files will be destroyed. Furthermore, physical deterioration or catastrophic events may shorten the time our records are available. The working papers and files of our firm are not a substitute for your records.

### **Tax consulting services**

This statement of work also covers tax consulting services that may arise for which you seek our consultation and advice, both written and oral, that are not the subject of a separate statement of work. These additional services are not included in our fees for the preparation of the federal and state returns

and filings. Our fee for such services will be billed to you, along with any direct costs.

We will base our tax analysis and conclusions on the facts you provide to us, and will not independently verify those facts. We will review the applicable tax law, tax regulations, and other tax authorities, all of which are subject to change. At your request, we will provide a memorandum of our conclusions. Written advice provided by us is for your information and use only and is not to be provided to any third party without our express written consent.

Unless we are separately engaged to do so, we will not continuously monitor and update our advice for subsequent changes or modifications to the tax law and regulations, or to the related judicial and administrative interpretations.

### **Fees**

We have estimated our professional fees for tax compliance services in the fee table below. Our customary billing practice is to invoice up to 50% of the estimated professional services fees upon receipt of your tax return information, or upon the preparation of an application for an extension of time to file your tax return(s) if earlier. We will continue to periodically bill for our time as work progresses.

We will prepare and sign as paid preparer the returns and filings identified herein. Our professional fee reflects that, if needed, CLA will provide you with first and second drafts of each return or filing. Additional drafts requested by you may result in additional professional fees.

Additional charges may apply if you request a paper copy of your return(s), your circumstances are complex, changes to the tax law occur, or unexpected circumstances require additional time. We may apply a 15% surcharge (based on prior year invoice) if you do not provide accurate and complete tax information at least 60 days prior to the extended federal filing deadline, and an additional 5% surcharge for each and every two-week period thereafter until accurate and complete tax information is provided.

We will bill for all expenses (including internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees. Our invoices, including applicable state and local taxes, are payable on presentation.

<b>Tax Compliance Services or Form Description</b>	<b>Fee Detail</b>
Preparation of IRS Form 990 and CA Form 199 – Return of Organization Exempt from Income Tax	\$4,000

### **Termination of agreement**

Either party (you or CLA) may terminate this SOW at any time by giving written notice to the other party. In that event, the provisions of this SOW and the MSA shall continue to apply to all services rendered prior to termination.

**Agreement**

We appreciate the opportunity to provide the services described in this SOW under the MSA. All terms and provisions of the MSA shall apply to these services. If you agree with the terms of this SOW, please return a signed copy to us to indicate your acknowledgment and understanding of, and agreement with, this SOW.

**CliftonLarsonAllen LLP**

Derrick DeBruyne

Principal

derrick.debruyne@claconnect.com



**Accepted on behalf of:**

CLA  
CLA

*Derrick DeBruyne*

---

Derrick DeBruyne, Principal

**SIGNED** 2/17/2024, 9:27:09 AM MST

**Client**  
Journey School

SIGN:

---

Gavin Keller

DATE:

Fiscal Year Ending June 30, 2024

- First Interim/October 31st
- Second Interim/January 31st

**CHARTER SCHOOL INTERIM BUDGET REPORT**

Charter School Name: Journey School

CDS #: 30-66464-6117758

Charter Approving Entity: Capistrano Unified

County: Orange

Charter #: 0294

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below)

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

Description	Object Code	Budget			Actual To-Date		
		Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
<b>A. REVENUES</b>							
1. Revenue Limit Sources							
Local Control Funding Formula	8011	1,509,385.36		1,509,385.36	787,851.00		787,851.00
Education Protection Account	8012	137,862.00		137,862.00	52,008.00		52,008.00
State Aid - Prior Years	8019			0.00	(74,815.00)		(74,815.00)
In Lieu of Property Taxes	8096	4,442,961.06		4,442,961.06	2,386,042.00		2,386,042.00
Other LCFF Transfers	8091, 8097			0.00			0.00
Total, Revenue Limit Sources		6,090,208.42	0.00	6,090,208.42	3,151,086.00	0.00	3,151,086.00
2. Federal Revenues							
No Child Left Behind	8290		49,275.00	49,275.00			0.00
Special Education - Federal	8181, 8182			0.00			0.00
Child Nutrition - Federal	8220			0.00			0.00
Other Federal Revenues	8110, 8260-8299		74,849.50	74,849.50		56,089.83	56,089.83
Total, Federal Revenues		0.00	124,124.50	124,124.50	0.00	56,089.83	56,089.83
3. Other State Revenues							
Special Education - State	8792			0.00			0.00
Special Education Mental Health Services	8592			0.00		23,729.00	23,729.00
Mandate Block Grant	8550	10,583.51		10,583.51	10,535.00		10,535.00
Charter School Facility Grant Program (SB 740)	8590			0.00			0.00
Lottery - Unrestricted	8561	91,818.70		91,818.70	51,576.85		51,576.85
Lottery - Restricted - Prop 20	8562		36,187.37	36,187.37		5,808.26	5,808.26
All Other State Revenues	StateRevAO		409,870.61	409,870.61		954,621.26	954,621.26
Total, Other State Revenues		102,402.21	446,057.98	548,460.19	62,111.85	984,158.52	1,046,270.37
4. Other Local Revenues							
All Other Local Revenues	LocalRevAO	252,651.00		252,651.00	138,749.38		138,749.38
Total, Local Revenues		252,651.00	0.00	252,651.00	138,749.38	0.00	138,749.38
5. TOTAL REVENUES		6,445,261.63	570,182.48	7,015,444.11	3,351,947.23	1,040,248.35	4,392,195.58
<b>B. EXPENDITURES</b>							
1. Certificated Salaries							
Teachers' Salaries	1100	1,922,480.62	8,280.00	1,930,760.62	997,447.19	2,515.04	999,962.23
Certificated Pupil Support Salaries	1200	152,602.50		152,602.50	18,168.24		18,168.24
Certificated Supervisors' and Administrators' Salaries	1300	442,570.52		442,570.52			0.00
Other Certificated Salaries	1900			0.00	255,523.48	7,168.78	262,692.26
Total, Certificated Salaries		2,517,653.65	8,280.00	2,525,933.65	1,271,138.92	9,683.81	1,280,822.73
2. Non-certificated Salaries							
Instructional Aides' Salaries	2100	502,367.43	147,371.35	649,738.78	314,747.01	6,411.45	321,158.46
Non-certificated Support Salaries	2200	34,355.79		34,355.79	38,967.69	22,032.50	61,000.19
Non-certificated Supervisors' and Administrators' Sal.	2300			0.00			0.00
Clerical and Office Salaries	2400	437,978.03		437,978.03	226,478.47	715.56	227,194.03
Other Non-certificated Salaries	2900	22,312.79		22,312.79	24,634.58		24,634.58
Total, Non-certificated Salaries		997,014.04	147,371.35	1,144,385.39	604,827.75	29,159.51	633,987.26
3. Employee Benefits							
STRS	3100-3102	515,831.84	11,473.26	527,305.10	264,112.23	1,849.61	265,961.84
PERS	3200-3202	279,820.76	25,501.26	305,322.02	116,245.40	802.40	117,047.80
OASDI / Medicare / Alternative	3300-3302	98,218.34	11,393.97	109,612.31	55,647.67	2,364.86	58,012.53
Health and Welfare Benefits	3400-3402	409,282.31	7,247.69	416,530.00	288,976.44		288,976.44
Unemployment Insurance	3500-3502	1,757.33	77.83	1,835.16	918.63	19.22	937.85
Workers' Compensation Insurance	3600-3602	28,048.39	0.00	28,048.39	27,505.00		27,505.00
Retiree Benefits	3701-3702			0.00			0.00
PERS Reduction (for revenue limit funded schools)	3801-3802			0.00			0.00
Other Employee Benefits	3901-3902	3,000.00		3,000.00	344.96		344.96
Total, Employee Benefits		1,335,958.98	55,694.00	1,391,652.98	753,750.34	5,036.08	758,786.42
4. Books and Supplies							
Approved Textbooks and Core Curricula Materials	4100		17,680.39	17,680.39	17,048.66		17,048.66
Books and Other Reference Materials	4200	6,500.00		6,500.00	2,952.99	12.00	2,964.99
Materials and Supplies	4300	135,566.71	36,187.37	171,754.08	45,641.21	7,750.63	53,391.84
Noncapitalized Equipment	4400	52,359.63	35,000.00	87,359.63	35,192.01	501.01	35,693.02
Food	4700			0.00			0.00
Total, Books and Supplies		194,426.34	88,867.76	283,294.10	100,834.87	8,263.64	109,098.51

Fiscal Year Ending June 30, 2024

- First Interim/October 31st
- Second Interim/January 31st

CHARTER SCHOOL INTERIM BUDGET REPORT

Charter School Name: Journey School

Description	Object Code	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
<b>5. Services and Other Operating Expenditures</b>							
Travel and Conferences	5200	24,985.00	5,150.00	30,135.00	13,719.67	531.38	14,251.05
Dues and Memberships	5300	14,907.00	4,650.00	19,557.00	14,301.94		14,301.94
Insurance	5400	78,618.43		78,618.43	60,981.41		60,981.41
Operations and Housekeeping Services	5500	171,144.00		171,144.00	107,495.33		107,495.33
Rentals, Leases, Repairs, and Noncap. Improvements	5600	243,212.00		243,212.00	134,731.39		134,731.39
Professional/Consulting Services and Operating Expend.	5800	769,160.40	260,169.37	1,029,329.77	480,831.26	175,190.21	656,021.47
Communications	5900	15,076.03		15,076.03	3,083.89		3,083.89
<b>Total, Services and Other Operating Expenditures</b>		<b>1,317,102.86</b>	<b>269,969.37</b>	<b>1,587,072.23</b>	<b>815,144.89</b>	<b>175,721.59</b>	<b>990,866.48</b>
<b>6. Capital Outlay</b>							
(Objects 6100-6170, 6200-6500 for modified accrual basis only)							
Land and Land Improvements	6100-6170			0.00			0.00
Buildings and Improvements of Buildings	6200			0.00			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00			0.00
Equipment	6400			0.00			0.00
Equipment Replacement	6500			0.00			0.00
Depreciation Expense (for accrual basis only)	6900	52,772.13		52,772.13	54,747.74	386.39	55,134.13
<b>Total, Capital Outlay</b>		<b>52,772.13</b>	<b>0.00</b>	<b>52,772.13</b>	<b>54,747.74</b>	<b>386.39</b>	<b>55,134.13</b>
<b>7. Other Outgo</b>							
Tuition to Other Schools	7110-7143			0.00			0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213			0.00			0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE			0.00			0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO			0.00			0.00
All Other Transfers	7281-7299			0.00			0.00
Debt Service:							
Interest	7438			0.00			0.00
Principal (for modified accrual basis only)	7439			0.00			0.00
<b>Total, Other Outgo</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>8. TOTAL EXPENDITURES</b>		<b>6,414,927.99</b>	<b>570,182.48</b>	<b>6,985,110.47</b>	<b>3,600,444.51</b>	<b>228,251.02</b>	<b>3,828,695.53</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>30,333.64</b>	<b>0.00</b>	<b>30,333.64</b>	<b>(248,497.28)</b>	<b>811,997.33</b>	<b>563,500.05</b>
<b>D. OTHER FINANCING SOURCES / USES</b>							
1. Other Sources	8930-8979			0.00			0.00
2. Less: Other Uses	7630-7699			0.00			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999			0.00			0.00
<b>4. TOTAL OTHER FINANCING SOURCES / USES</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		<b>30,333.64</b>	<b>0.00</b>	<b>30,333.64</b>	<b>(248,497.28)</b>	<b>811,997.33</b>	<b>563,500.05</b>
<b>F. FUND BALANCE, RESERVES</b>							
1. Beginning Fund Balance							
a. As of July 1	9791	2,252,977.75	1,325.38	2,254,303.13	2,252,977.75	1,325.38	2,254,303.13
b. Adjustments/Restatements to Beginning Balance	9793, 9795	427,780.88		427,780.88	427,780.88		427,780.88
c. Adjusted Beginning Balance		<b>2,680,758.63</b>	<b>1,325.38</b>	<b>2,682,084.01</b>	<b>2,680,758.63</b>	<b>1,325.38</b>	<b>2,682,084.01</b>
2. Ending Fund Balance, June 30 (E + F1c)		<b>2,711,092.27</b>	<b>1,325.38</b>	<b>2,712,417.65</b>	<b>2,432,261.35</b>	<b>813,322.71</b>	<b>3,245,584.06</b>
Components of Ending Fund Balance (Optional):							
Reserve for Revolving Cash (equals object 9130)	9711			0.00	0.00	0.00	0.00
Reserve for Stores (equals object 9320)	9712			0.00	0.00	0.00	0.00
Reserve for Prepaid Expenditures (equals object 9330)	9713			0.00	8,777.04	0.00	8,777.04
Reserve for All Others	9719			0.00			0.00
General Reserve	9730			0.00			0.00
Legally Restricted Balance	9740			0.00			0.00
Designated for Economic Uncertainties	9770 *			0.00			0.00
Other Designations	9775, 9780			0.00			0.00
Undesignated / Unappropriated Amount	9790 *	<b>2,711,092.27</b>	<b>1,325.38</b>	<b>2,712,417.65</b>	<b>2,432,261.35</b>	<b>813,322.71</b>	<b>3,236,807.02</b>
* Percent of Total Expenditures and Other Uses		<b>38.81%</b>	<b>0.02%</b>	<b>38.83%</b>	<b>63.30%</b>	<b>21.24%</b>	<b>84.54%</b>

Fiscal Year Ending June 30, 2024

CHARTER SCHOOL INTERIM BUDGET REPORT

- First Interim/October 31st
- Second Interim/January 31st

Charter School Name: Journey School

Description	Object Code	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
<b>G. ASSETS</b>							
1. Cash							
In County Treasury	9110	48,413.21	812,383.72		860,796.93		
Fair Value Adjustment to Cash in County Treasury	9111				0.00		
In Banks	9120	474,621.11	(4,718.33)		469,902.78		
In Revolving Fund	9130				0.00		
With Fiscal Agent	9135				0.00		
Collections Awaiting Deposit	9140				0.00		
2. Investments	9150	1,510,034.30			1,510,034.30		
3. Accounts Receivable	9200				0.00		
4. Due from Grantor Government	9290	435,448.88	4,718.33		440,167.21		
5. Stores	9320				0.00		
6. Prepaid Expenditures (Expenses)	9330	8,777.04			8,777.04		
7. Other Current Assets	9340	266,476.36			266,476.36		
8. Capital Assets (for accrual basis only)	9400-9499	340,131.81	938.99		341,070.80		
9. TOTAL ASSETS		3,083,902.71	813,322.71		3,897,225.42		
<b>H. LIABILITIES</b>							
1. Accounts Payable	9500	248,183.89			248,183.89		
2. Due to Grantor Government	9590	29,438.40			29,438.40		
3. Current Loans	9640				0.00		
4. Deferred Revenue	9650				0.00		
5. Long-Term Liabilities (for accrual basis only)	9660-9669	374,019.07			374,019.07		
6. TOTAL LIABILITIES		651,641.36	0.00		651,641.36		
<b>I. FUND BALANCE</b>							
Ending Fund Balance, June 30 (G9-H6) (must agree with Line F2)		2,432,261.35	813,322.71		3,245,584.06		

CHECK 0.00 - 0.00

### 2023–24 Title I, Part A LEA Allocation and Reservations

To report LEA required and authorized reservations before distributing funds to schools.

**CDE Program Contact:**

Sylvia Hanna, Title I Policy, Program, and Support Office, [SHanna@cde.ca.gov](mailto:SHanna@cde.ca.gov), 916-319-0948  
 Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

2023–24 Title I, Part A LEA allocation (+)	\$32,580
Transferred-in amount (+)	\$0
Nonprofit private school equitable services proportional share amount (-)	\$0
2023–24 Title I, Part A LEA available allocation	\$32,580

**Required Reservations**

Parent and family engagement (If the allocation is greater than \$500,000, then parent and family engagement equals 1% of the allocation minus the nonprofit private school equitable services proportional share amount.)	\$0
School parent and family engagement	\$0
LEA parent and family engagement	\$0
Local neglected institutions Does the LEA have local institutions for neglected children?	
Local neglected institutions reservation	
Local delinquent institutions Does the LEA have local institutions for delinquent children?	
Local delinquent institutions reservation	
Direct or indirect services to homeless children, regardless of their school of attendance	\$196

**Authorized Reservations**

Public school Choice transportation	\$0
Other authorized activities	\$0
2023–24 Approved indirect cost rate	5.06%
Indirect cost reservation	\$0
Administrative reservation	\$0

**Reservation Summary**

Total LEA required and authorized reservations	\$196
School parent and family engagement reservation	\$0
Amount available for Title I, Part A school allocations	\$32,384

\*\*\*Warning\*\*\*

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

**2023–24 Consolidation of Administrative Funds**

A request by the local educational agency (LEA) to consolidate administrative funds for specific programs.

**CDE Program Contact:**

Hilary Thomson, Fiscal Oversight and Support Office, [HThomson@cde.ca.gov](mailto:HThomson@cde.ca.gov), 916-323-0765

Title I, Part A Basic SACS Code 3010	No
Title I, Part C Migrant Education SACS Code 3060	No
Title I, Part D Delinquent SACS Code 3025	No
Title II, Part A Supporting Effective Instruction SACS Code 4035	No
Title III English Learner Students - 2% maximum SACS Code 4203	No
Title III Immigrant Students SACS Code 4201	No
Title IV, Part A Student Support - 2% maximum SACS Code 4127	No
Title IV, Part B 21st Century Community Learning Centers SACS Code 4124	No

**\*\*\*Warning\*\*\***

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### 2023–24 Title I, Part A School Student Counts

This data collection contains school-level student data. The information in this data collection will be used by the local educational agency (LEA) to calculate eligibility and ranking for Title I, Part A school allocations.

**CDE Program Contact:**

Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

School ranking options Within the LEA

Select the highest to lowest school ranking method

Select a low income measure FRPM

### Explanation of Pre-populated Student Counts

The data fields in this form, containing total student enrollment counts and eligible low income students counts, were pre-populated with PRIOR year (Fiscal Year 2022–23) certified data from CALPADS Fall 1 data submission.

**Note:** The LEA may use prior year data or current year data to calculate eligibility and ranking for Title I, Part A school allocations. The LEA may choose to manually enter current year data in place of prior year data.

School Name	School Code	Low Grade Offered	High Grade Offered	Grade Span Group	Student Enrollment	Eligible Low Income Students
Journey	6117758	K	8	1	591	128

**\*\*\*Warning\*\*\***

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**2023–24 Title I, Part A Notification of Authorization of Schoolwide Program**

This report provides notification to the California Department of Education of a school's eligibility and local board approval to operate under and report as Schoolwide Program.

**CDE Program Contact:**

Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

School Name	School Code	Authorized SWP	Low Income %	Local Board Approval Date SWP Plan (MM/DD/YYYY)	Local Board Approval Date SWP Waiver (MM/DD/YYYY)
Journey	6117758	N			

**\*\*\*Warning\*\*\***

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2023–24 Title I, Part A School Allocations

This report identifies the amount of Title I, Part A funds to be allocated to eligible schools.

CDE Program Contact:

Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

LEA meets small LEA criteria.

A local educational agency (LEA) is defined as a small LEA if, based on the school list and the data entered in Title I, Part A School Student Counts, the LEA meets one or both of the following:

- Is a single school LEA
- Has enrollment total for all schools less than 1,000

If applicable, enter a Discretion Code. Use lower case only.

Allowable Discretion Codes

- a - Below LEA average and at or above 35% student low income
- d - Waiver for a desegregation plan on file
- e - Grandfather provision
- f - Feeder pattern

Low income measure	FRPM
Ranking Schools Highest to Lowest	Within the LEA
LEA-wide low income %	21.66%
Available Title I, Part A school allocations	\$32,384
Available parent and family engagement reservation	\$0

School Name	School Code	Grade Span Group	Student Enrollment	Eligible Low Income Students	Low Income Student %	Eligible to be Served	Required to be Served	Ranking	\$ Per Low Income Student	TIA School Allocation	2022–23 Carryover	Parent and Family Engagement	Total School Allocation	Discretion Code
Journey	6117758	1	591	128	21.66	*	*	1	253.00	32384.00			32384.00	

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**2021–22 Title II, Part A Fiscal Year Expenditure Report, Closeout 27 Month**

A report of year-to-date expenditures by activity. Activity period covered is July 1, 2021 through September 30, 2023.

**CDE Program Contact:**

Alice Ng (Fiscal), Division Support Office, [ANg@cde.ca.gov](mailto:ANg@cde.ca.gov), 916-323-4636  
 Lisa Fassett (Program), Professional Learning Support & Monitoring Office, [LFassett@cde.ca.gov](mailto:LFassett@cde.ca.gov), 916-323-4963

2021–22 Title II, Part A allocation	\$7,034
2021–22 Title II, Part A total apportionment issued	\$7,034
Transferred–in amount	\$0
Transferred–out amount	\$0
2021–22 Total allocation	\$7,034

**Professional Development Expenditures**

Professional development for teachers	\$7,034
Professional development for administrators	\$0
Consulting/Professional services	\$0
Induction programs	\$0
Books and other supplies	\$0
Dues and membership	\$0
Travel and conferences	\$0

**Personnel and Other Authorized Activities**

Certificated personnel salaries	\$0
Classified personnel salaries	\$0
Employee benefits	\$0
Developing or improving an evaluation system	\$0
Recruitment activities	\$0
Retention activities	\$0
Class size reduction	\$0

**Program Expenditures**

Direct administrative costs	\$0
Indirect costs	\$0
Equitable services for nonprofit private schools	\$0
Total expenditures	\$7,034
2021–22 Unspent funds	\$0
Note: CDE will invoice the LEA for the unspent 2021–22 total allocation	

**\*\*\*Warning\*\*\***

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### 2021–22 Title IV, Part A LEA Closeout Report

The purpose of this data collection is to report final expenditures, by activity, and calculate Title IV, Part A unspent funds.

**CDE Program Contact:**

Kevin Donnelly, Rural Education and Student Support Office , [TitleIV@cde.ca.gov](mailto:TitleIV@cde.ca.gov), 916-319-0942

2021–22 Title IV, Part A LEA allocation	\$10,000
Transferred-in amount	\$0
Transferred-out amount	\$10,000
2021–22 Title IV, Part A LEA available allocation	\$0

**Final Expenditures**

Administrative and indirect costs	\$0
Well-Rounded Educational Opportunities activities	\$0
Safe and Healthy Students activities	\$0
Effective Use of Technology activities	\$0
Technology Infrastructure	\$0
Total expenditures	\$0
Amount of unspent funds	\$0
Note: CDE will invoice the LEA for the unspent funds	

**\*\*\*Warning\*\*\***

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### 2022–23 Title I, Part A LEA Carryover

Report only expenditures and obligations made through September 30 for fiscal year 2022–23 allocation to determine funds to be carried over.

**CDE Program Contact:**

Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

### Carryover Calculation

2022–23 Title I, Part A LEA allocation	\$31,512
Transferred-in amount	\$10,000
2022–23 Title I, Part A LEA available allocation	\$41,512
Expenditures and obligations through September 30, 2023	\$41,512
Carryover as of September 30, 2023	\$0
Carryover percent as of September 30, 2023	0.00%

**\*\*\*Warning\*\*\***

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**2022–23 Title IV, Part A LEA Use of Funds and Carryover**

The purpose of this data collection is to report year-to-date expenditures, by activity, and calculate Title IV, Part A carryover funds.

**CDE Program Contact:**

Kevin Donnelly, Rural Education and Student Support Office , [TitleIV@cde.ca.gov](mailto:TitleIV@cde.ca.gov), 916-319-0942

2022–23 Title IV, Part A LEA allocation	\$10,000
Transferred-in amount	\$0
Transferred-out amount	\$10,000
2022–23 Title IV, Part A LEA available allocation	\$0

**Expenditures**

Administrative and indirect costs	\$0
Well-Rounded Educational Opportunities activities	\$0
Safe and Healthy Students activities	\$0
Effective Use of Technology activities	\$0
Technology Infrastructure	\$0
Total expenditures	\$0
Carryover as of September 30, 2023	\$0

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**2023–24 Federal Transferability**

Federal transferability of funds is governed by Title V in ESSA Section 5102. An LEA may transfer Title II, Part A and/or Title IV, Part A program funds to other allowable programs. This transferability is not the same as Title V, Part B Alternative Fund Use Authority (AFUA) governed by ESEA Section 5211.

**Note:** Funds utilized under Title V, Part B AFUA are not to be included on this form.

**CDE Program Contact:**

Lisa Fassett, Professional Learning Support & Monitoring Office, [LFassett@cde.ca.gov](mailto:LFassett@cde.ca.gov), 916-323-4963  
 Kevin Donnelly, Rural Education and Student Support Office, [TitleIV@cde.ca.gov](mailto:TitleIV@cde.ca.gov), 916-319-0942

**Title II, Part A Transfers**

2023–24 Title II, Part A allocation	\$8,226
Transferred to Title I, Part A	\$0
Transferred to Title I, Part C	\$0
Transferred to Title I, Part D	\$0
Transferred to Title III English Learner	\$0
Transferred to Title III Immigrant	\$0
Transferred to Title IV, Part A	\$0
Transferred to Title V, Part B, Subpart 1 Small, Rural School Achievement Grant	\$0
Transferred to Title V, Part B, Subpart 2 Rural and Low-Income Grant	\$0
Total amount of Title II, Part A funds transferred out	\$0
2023–24 Title II, Part A allocation after transfers out	\$8,226

**Title IV, Part A Transfers**

2023–24 Title IV, Part A allocation	\$10,000
Transferred to Title I, Part A	\$10,000
Transferred to Title I, Part C	\$0
Transferred to Title I, Part D	\$0
Transferred to Title II, Part A	\$0
Transferred to Title III English Learner	\$0
Transferred to Title III Immigrant	\$0
Transferred to Title V, Part B Subpart 1 Small, Rural School Achievement Grant	\$0
Transferred to Title V, Part B Subpart 2 Rural and Low-Income Grant	\$0
Total amount of Title IV, Part A funds transferred out	\$10,000
2023–24 Title IV, Part A allocation after transfers out	\$0

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### 2023–24 Title I, Part A LEA Allocation and Reservations

To report LEA required and authorized reservations before distributing funds to schools.

**CDE Program Contact:**

Sylvia Hanna, Title I Policy, Program, and Support Office, [SHanna@cde.ca.gov](mailto:SHanna@cde.ca.gov), 916-319-0948  
 Rina DeRose, Title I Policy, Program, and Support Office, [RDeRose@cde.ca.gov](mailto:RDeRose@cde.ca.gov), 916-323-0472

2023–24 Title I, Part A LEA allocation (+)	\$32,580
Transferred-in amount (+)	\$10,000
Nonprofit private school equitable services proportional share amount (-)	\$0
2023–24 Title I, Part A LEA available allocation	\$42,580

**Required Reservations**

Parent and family engagement (If the allocation is greater than \$500,000, then parent and family engagement equals 1% of the allocation minus the nonprofit private school equitable services proportional share amount.)	\$0
School parent and family engagement	\$0
LEA parent and family engagement	\$0
Local neglected institutions Does the LEA have local institutions for neglected children?	
Local neglected institutions reservation	
Local delinquent institutions Does the LEA have local institutions for delinquent children?	
Local delinquent institutions reservation	
Direct or indirect services to homeless children, regardless of their school of attendance	\$212

**Authorized Reservations**

Public school Choice transportation	\$0
Other authorized activities	\$0
2023–24 Approved indirect cost rate	5.06%
Indirect cost reservation	\$0
Administrative reservation	\$0

**Reservation Summary**

Total LEA required and authorized reservations	\$212
School parent and family engagement reservation	\$0
Amount available for Title I, Part A school allocations	\$42,368

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**2023–24 Title II, Part A LEA Allocations**

The purpose of this data collection is to calculate the total allocation amount available to the local educational agency (LEA) for Title II, Part A Supporting Effective Instruction.

**CDE Program Contact:**

Alice Ng (Fiscal), Division Support Office, [ANg@cde.ca.gov](mailto:ANg@cde.ca.gov), 916-323-4636

Lisa Fassett (Program), Professional Learning Support & Monitoring Office, [LFassett@cde.ca.gov](mailto:LFassett@cde.ca.gov), 916-323-4963

2023–24 Title II, Part A allocation	\$8,226
Transferred-in amount	\$0
Total funds transferred out of Title II, Part A	\$0
2023–24 Total allocation	\$8,226
Administrative and indirect costs	\$0
Reservation for equitable services for nonprofit private schools	\$0
2023–24 Title II, Part A adjusted allocation	\$8,226

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**2023–24 Title IV, Part A LEA Allocations**

The purpose of this data collection is to calculate the allocation available to the local educational agency (LEA) and report reservations of Title IV, Part funds.

**CDE Program Contact:**

Kevin Donnelly, Rural Education and Student Support Office , [TitleIV@cde.ca.gov](mailto:TitleIV@cde.ca.gov), 916-319-0942

2023–24 Title IV, Part A LEA allocation	\$10,000
Funds transferred-in amount	\$0
Funds transferred-out amount	\$10,000
2023–24 Title IV, Part A LEA available allocation	\$0

**Reservations**

Indirect cost reservation	\$0
Administrative reservation	\$0
Equitable services for nonprofit private schools	\$0
2023–24 Title IV, Part A LEA adjusted allocation	\$0

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## Memo

Date: August 31, 2023

To: Journey School Council

From: Gavin Keller

Re: Professional Goals – 2023-2024

Please find the following professional goals, which I believe will serve as guideposts for professional development efforts throughout the school year and in effect will help support Journey School improvement over the course of the 2023-2024 school year and foreseeable future.

**GOAL #1: Continue re-establishing Journey's school culture, centered on Waldorf-inspired approach, effective communication, parent participation/engagement, and "Green Ribbon Award" winning practices.**

### *Areas of Focus*

- Improve upon parent communication
- Coordinate and offer parent education events
- Partner with Parent Cabinet to enliven volunteerism and parental involvement
- Increase funds raised through "Annual Giving"
- Offer staff professional development (focused on parent partnership and communication)
- Establish newsletter and social media outreach
- Support staff communication efforts
- Reinvigorate eco-literacy practices on campus and apply for the "green ribbon award" through the California Department of Education.
- Lead school through accreditation process with the Alliance for Public Waldorf Education (APWE).

- Increase visibility on campus and within classrooms
- Help ease the divide that exists among many families in the community, largely created by a difference in political beliefs

### *Metrics*

- Parent survey
- Volunteer rates
- Participation rates at festivals, school events, parent education offerings
- Student retention rates
- Formal evaluation and observational data of school staff
- Formal evaluation of Executive Director
- LCAP results for Goal #3- Strengthen school community by improving parent engagement and student engagement.
- Green Ribbon Award determination
- Accreditation results from APWE.

## **GOAL #2: Develop a data-driven and inspiring vision for Journey's future.**

### *Areas of Focus*

- Collaborate with a data support provider to aggregate and present data effectively
- Analyze data as a driver of instruction and rigor
- Support alumni data gathering and a possible partnership with local high schools in sharing data regarding Journey alumni.
- Offer staff professional development (focused on data collection and informed planning)
- Strengthen understanding of data and its relation to student enrollment and retention
- Lay groundwork for successful rechartering in the 2027-28 school year.
- Bring resources and form external relationships in support of the vision
- Develop staff and programs to continue improving our ability to serve our neurodiverse population

### *Metrics*

- LCAP results for LCAP Goal 1 - Develop and enhance appropriate interventions to meet the academic, behavioral and social-emotional needs of student sub-groups and at-risk students.
- LCAP results for LCAP Goal 2 - Students in TK-8 will demonstrate academic growth and proficiencies needed to ensure they are progressing towards high school readiness.
- CAASPP and Illuminate Education scores
- Offer staff professional development (focused on data collection and informed planning)

## JOURNEY SCHOOL COUNCIL RECURRING ACTION ITEMS

### RESOURCES FOR PREPARING COUNCIL MONTHLY AGENDA:

1. Review this list
2. Review minutes from last board meeting for notes about agenda items
3. Check with Gavin and Larry for items that need approval
4. Check ExED Business Guide for upcoming approvals
5. Review agenda from the same month the year prior

MONTH	ITEMS	NOTES
January	<p>Winter Con App</p> <p>SARC</p> <p>CA School Dashboard Presentation</p> <p>Student Outcomes Charter Goal #4: Positive School Climate and Social Emotional Literacy</p>	<p>May be later based on CDE release</p> <p>Must be approved and submitted by Feb 1 annually</p>
February	<p>Auditor Engagement</p> <p>Second Interim (if available)</p> <p>Annual Update to School Safety Plan</p> <p>Union negotiation openers (sunshine requirement)</p> <p>LCAP mid year update</p>	<p>Due to county by April 1</p> <p>Due to district by March 15</p> <p>Must be approved by March 1 annually</p> <p>Usually JTA presents first, then following month JS presents. Can be done at the same time. Check current contract for required dates.</p> <p>Must be reviewed by council by February 28 and submitted to CUSD by March 15</p>

<p>March</p>	<p>Tax Returns (900 and 199)</p> <p>Form 700</p> <p>Second Interim</p> <p>Exec Dir evaluation cycle begins (survey, etc.)</p> <p>Union negotiations</p> <p>Student Outcomes Charter Goal #5: Environmental and Ecological Literacy</p>	<p>Usually due no later than May 15</p> <p>Reminder/review, board approval not required</p> <p>Due March 15. If not approved in February may need to be ratified at March meeting</p> <p>Closed session</p>
<p>April</p>	<p>School calendar and instructional minutes</p> <p>Various policies for review (EL reclassification, Parent Engagement, Homeless, Suicide Prevention, Title IX, etc.)</p> <p>Exec Dir review of evaluation results</p> <p>Union negotiations</p>	<p>May be done earlier if ready</p> <p>May be staggered at various times during the year if applicable</p> <p>Parent engagement and homeless needed for ConApp</p> <p>Closed session</p> <p>Closed session</p>
<p>May</p>	<p>Local Indicator approval</p> <p>Draft budget review</p> <p>Draft LCAP review</p> <p>ExED contract (if needed)</p>	<p>Closed session</p>

	<p>Executive Director salary discussions</p> <p>Final union contract (CBA) approved</p> <p>Annual STRS contract with OCDE</p> <p>Annual Charter School Info Survey</p> <p>Student Outcomes Charter Goal #3: Engaged and Creative Learners</p>	<p>May be done earlier if ready. Final approval in open session</p> <p>May be done a different month depending on OCDE timeline</p> <p>May be delayed if not released by CDE</p>
<p>June</p>	<p>ConApp with Funding Selections</p> <p>LCAP</p> <p>Preliminary budget</p> <p>Board member terms</p> <p>Board officers</p> <p>Board regular meeting schedule</p> <p>Bank Signer resolution</p> <p>Annual staffing plan</p> <p>Various expenditure plan updates</p> <p>Exec Dir final compensation decisions</p>	<p>Subject to release date by CDE</p> <p>LCAP must be approved first</p> <p>Done anytime there is a change in Board officers</p> <p>Can be done in May if ready</p> <p>Must be a REGULAR meeting. Final offer should be voted on</p>

		in open session with notes about executive comparison, but can be discussed in closed session if needed
July	NO BOARD MEETING	
August	<p>Unaudited Actuals (year end financials)</p> <p>School Handbook Updates</p> <p>Independent Study Policy &amp; Master Agreement for IS</p> <p>Annual EPA Notice</p> <p>UCP/UCP notice updates</p> <p>Declaration of Need</p> <p>AVCA agreements</p>	<p>Due September 15</p> <p>May be done earlier if ready</p> <p>IS Policy changes require a public hearing</p> <p>Must be posted to website</p> <p>If changes are needed. Notice must be provided and posted annually</p> <p>Should be done before hiring teachers who are not fully credentialed</p> <p>May be done on different timeline as needed</p>
September	Recurring expense listing	Part of fiscal policies
October	<p>Biennial update to Conflict of Interest Code</p> <p>Student Outcomes Charter Goal #6: Program Satisfaction and Parental Involvement</p>	Due to OC Clerk every other year
November/December	<p>Annual Audit</p> <p>First Interim Financials</p> <p>School Dashboard review</p>	<p>Due no later than December 15</p> <p>Due no later than December 15</p> <p>Does not require board approval, may be done as data is available</p>

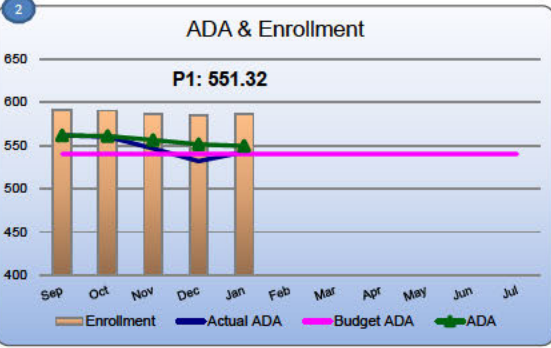
	<p>Student Outcomes Charter Goal #1 and #2: Review of Academic Achievement</p>	
<p>AS NEEDED</p>	<p>Volunteer Policies</p> <p>Board recruitment &amp; board composition</p> <p>Enrollment/Lottery policies</p> <p>Contracts (e.g. Earthroots, food services, afterschool, staff coaching/eval, janitorial, etc.)</p> <p>MOU with CUSD</p> <p>Facility Use Agreement with CUSD</p> <p>Charter (every 5 years)</p> <p>Bylaws (every 3 years minimum)</p> <p>Fiscal Policies—good to review annually but at least every 2-3 years</p> <p>Staff job descriptions</p> <p>Board Training/Retreat/Strategic Planning</p> <p>Employee Handbook</p>	



# JOURNEY SCHOOL - Financial Dashboard (January 2024)

**1 Key Performance Indicators**

ADA vs. Budget ● Cash on Hand ●  
 Net Income / (Loss) ● Year-End Cash ●



**State Budget Update**

**Per School Services of CA: Initial Impressions From Governor Newsom's 2024-25 State Budget Proposal**

As the Department of Finance revealed in its October and November Finance Bulletin, revenues have come in significantly below the 2023 State Budget Act levels. However, the gap is substantially less than stated by the Legislative Analyst's Office this fall—Governor Newsom states the budget gap at \$37.86 billion. Compared to current 2023-24 estimates, budget forecasts of the "Big Three" General Fund revenue sources through 2024-25 have decreased by approximately \$42.9 billion.

**LCFF**  
 The Governor's Budget includes an estimated and fully funded cost-of-living adjustment (COLA) of 0.76% for the Local Control Funding Formula (LCFF). However, to fully fund the LCFF, the Budget proposes withdrawing approximately \$2.8 billion from the Public School System Stabilization Account (PSSSA) in 2023-24, approximately \$2.2 billion in 2024-25, and using available reappropriation and reversion funding totaling \$38.6 million to support ongoing LCFF costs in 2024-25.

**3 Average Daily Attendance Analysis**

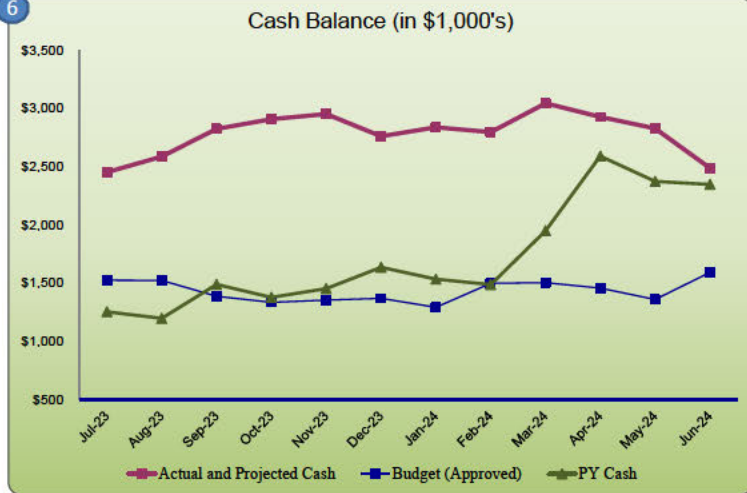
Category	Actual through Month 5	Forecasted P2	Budgeted P2	Better/ (Worse)	Prior Year P2
Enrollment	586	583	580	3	571
ADA %	93.5%	93.3%	93.1%	0.1%	92.1%
ADA	549.44	547.06	540.11	6.95	533.24

**4 LCFF Supplemental & Concentration Grant Factors**

Category	Budget	Forecast	Variance	Prior Year
Unduplicated Pupil %	25.2%	26.1%	0.9%	25.3%
3-Year Average %	24.8%	25.1%	0.3%	22.6%
District UPP C. Grant Cap	30.1%	30.1%	0.0%	30.1%

**5 INCOME STATEMENT**

INCOME STATEMENT	Forecast	VS. Budget		FY 23-24 YTD			Historical	
	As of 01/31/24	FY 23-24 Budget	Variance B/(W)	Actual YTD	Budget YTD	Variance B/(W)	FY 22-23	FY 21-22
Local Control Funding Formula	6,111,318	6,090,208	21,109	3,151,086	3,386,559	(235,473)	5,503,044	4,289,194
Federal Revenue	124,124	124,124	0	56,090	94,559	(38,470)	127,380	323,588
State Revenue	571,189	548,460	22,729	1,046,270	235,991	810,280	979,037	491,993
Other Local Revenue	69,151	9,651	59,500	47,236	4,837	42,399	47,713	6,908
Grants/Fundraising	243,000	243,000	0	91,513	150,022	(58,509)	293,886	368,891
<b>TOTAL REVENUE</b>	<b>7,118,783</b>	<b>7,015,444</b>	<b>103,339</b>	<b>4,392,196</b>	<b>3,871,969</b>	<b>520,226</b>	<b>6,951,059</b>	<b>5,480,574</b>
Total per ADA	13,013	12,989	24				13,036	11,408
w/o Grants/Fundraising	12,569	12,539	30				12,484	10,640
Certificated Salaries	2,356,542	2,525,934	169,392	1,280,823	1,394,930	114,107	2,091,898	1,998,789
Classified Salaries	1,224,261	1,144,385	(79,875)	633,987	640,800	6,813	1,161,891	990,020
Benefits	1,344,265	1,391,653	47,388	758,786	791,095	32,309	1,230,170	1,040,791
Student Supplies	276,294	283,294	7,000	109,099	198,582	89,484	395,837	165,492
Operating Expenses	1,678,612	1,587,072	(91,540)	990,866	937,995	(52,871)	1,619,604	1,536,017
Other	107,994	52,772	(55,222)	55,134	28,645	(26,489)	26,002	19,469
<b>TOTAL EXPENSES</b>	<b>6,987,969</b>	<b>6,985,110</b>	<b>(2,858)</b>	<b>3,828,696</b>	<b>3,992,048</b>	<b>163,352</b>	<b>6,525,402</b>	<b>5,750,577</b>
Total per ADA	12,774	12,933	159				12,237	11,970
<b>NET INCOME / (LOSS)</b>	<b>130,814</b>	<b>30,334</b>	<b>100,480</b>	<b>563,500</b>	<b>(120,079)</b>	<b>683,579</b>	<b>425,657</b>	<b>(270,004)</b>
<b>OPERATING INCOME</b>	<b>238,808</b>	<b>83,106</b>	<b>155,703</b>	<b>618,634</b>	<b>(62,788)</b>	<b>681,422</b>	<b>451,659</b>	<b>(250,535)</b>



**7 Balance Sheet**

	6/30/2023	1/31/2024	6/30/2024 FC
<b>Assets</b>			
Cash, Operating	2,349,524	2,840,734	2,488,919
Accounts Receivable	1,369,526	440,167	835,006
Due From Others	299	0	0
Other Assets	426,847	275,253	327,274
Net Fixed Assets	306,393	341,071	288,211
<b>Total Assets</b>	<b>4,452,590</b>	<b>3,897,225</b>	<b>3,939,410</b>
<b>Liabilities</b>			
A/P & Payroll	525,112	350,625	382,213
Due to Others	280,114	112,650	555,933
Deferred Revenue	776,913	0	0
Other Liabilities	188,367	188,367	188,367
<b>Total Liabilities</b>	<b>1,770,506</b>	<b>651,641</b>	<b>1,126,512</b>
<b>Equity</b>			
Beginning Fund Bal.	1,377,081	2,682,084	2,682,084
Net Income/(Loss)	1,305,003	563,500	130,814
<b>Total Equity</b>	<b>2,682,084</b>	<b>3,245,584</b>	<b>2,812,898</b>
<b>Total Liabilities &amp; Equity</b>	<b>4,452,590</b>	<b>3,897,225</b>	<b>3,939,410</b>

**Year-End Cash Balance**

	Projected	Budget	Variance
	2,488,919	1,592,591	896,328

Days Cash on Hand	132	151	132
Cash Reserve %	36.1%	41.3%	36.2%





Actuals as of 1/31/2024

	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	Actuals as of						FORECAST	Budget Variance		
	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Accrual	Jul-23 - Jun-24	Better / (Worse)	
5211 Travel & Conferences	675	7,664	1,329	350	610	2,289	1,334	3,177	3,177	3,177	3,177	3,177	3,177	30,135	-	
5311 Dues & Memberships	8,730	322	-	-	5,100	-	150	1,051	1,051	1,051	1,051	1,051	1,051	19,557	-	
5451 General Insurance	33,118	16,214	3,616	2,004	11	4,008	2,010	2,013	2,013	2,013	2,013	2,013	2,013	71,048	7,571	
5511 Utilities	1,407	9,294	1,391	12,729	1,143	11,669	6,738	7,006	7,006	7,006	7,006	7,006	7,006	79,400	-	
5531 Housekeeping Services	7,425	7,725	10,458	9,220	7,844	6,707	8,723	8,400	8,400	8,400	8,400	8,400	8,400	100,101	(13,777)	
5599 Other Facility Operations & Utiliti	298	1,256	538	1,416	298	298	918	578	578	578	578	578	578	7,913	(2,493)	
5619 Other Facility Rentals	15,130	15,130	15,130	15,130	15,130	15,206	15,130	15,715	15,715	15,715	15,715	15,715	15,715	184,562	-	
5621 Equipment Lease	1,610	565	1,168	2,057	5,747	1,168	1,168	1,993	1,993	1,993	1,993	1,993	1,993	23,450	(6,000)	
5631 Vendor Repairs	3,735	3,138	4,152	495	3,101	641	-	5,188	5,188	5,188	5,188	5,188	5,188	41,200	-	
5812 Field Trips & Pupil Transportatio	9,108	3,176	16,911	26,689	2,233	12,224	8,560	12,105	12,105	12,105	12,105	12,105	12,105	139,425	-	
5821 Legal	876	6,531	2,336	6,899	256	1,387	-	2,343	2,343	2,343	2,343	2,343	2,343	30,000	-	
5823 Audit	-	-	7,980	-	-	-	-	2,184	-	2,184	2,184	2,184	2,184	18,900	-	
5831 Advertisement & Recruitment	-	-	112	-	-	-	1,200	138	138	138	138	138	138	2,000	-	
5841 Contracted Substitute Teachers	-	-	-	2,445	6,370	1,225	1,470	2,248	2,248	2,248	2,248	2,248	2,248	22,748	-	
5849 Other Student Instructional Serv	4,620	82,634	4,556	21,437	25,359	27,194	17,583	23,406	23,406	23,406	23,406	23,406	23,406	300,414	(22,054)	
5852 PD Consultants & Tuition	8,265	1,525	945	-	400	(400)	-	1,901	1,901	1,901	1,901	1,901	1,901	20,238	-	
5854 Nursing & Medical (Non-IEP)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
5859 All Other Consultants & Services	56,823	-	11,667	11,667	11,667	11,667	11,667	15,089	15,089	15,089	15,089	15,089	15,089	190,601	(45,156)	
5861 Non Instructional Software	10,923	1,020	1,123	193	389	1,473	193	2,431	2,431	2,431	2,431	2,431	2,431	27,470	-	
5865 Fundraising Cost	-	-	-	-	-	-	-	508	508	508	508	508	508	508	2,539	(2,539)
5871 District Oversight Fees	-	-	-	-	-	25,557	9,736	5,280	5,280	5,280	5,280	5,280	5,280	61,692	(790)	
5872 Special Education Fees (SELPA)	-	-	-	-	-	121,800	46,400	21,066	21,066	21,066	21,066	21,066	21,066	273,530	(3,475)	
5899 All Other Expenses	422	2,841	1,421	1,530	852	1,099	1,789	1,332	1,332	1,332	1,332	1,332	1,332	16,614	(2,827)	
5911 Office Phone	-	-	-	-	-	-	-	1,277	1,277	1,277	1,277	1,277	1,277	6,386	-	
5913 Mobile Phone	122	51	-	102	51	51	52	378	378	378	378	378	378	2,318	-	
5921 Internet	354	304	222	265	243	244	243	449	449	449	449	449	449	4,120	-	
5923 Website Hosting	132	-	-	-	-	-	-	20	20	20	20	20	20	234	-	
5931 Postage & Shipping	-	123	-	95	330	-	-	244	244	244	244	244	244	1,768	-	
5999 Other Communications	50	-	-	-	-	50	-	30	30	30	30	30	30	250	-	
<b>Total 5000 - Operating Services</b>	<b>163,823</b>	<b>159,512</b>	<b>85,055</b>	<b>114,722</b>	<b>87,135</b>	<b>244,915</b>	<b>135,704</b>	<b>137,549</b>	<b>137,549</b>	<b>137,549</b>	<b>137,549</b>	<b>137,549</b>	<b>137,549</b>	<b>1,678,612</b>	<b>(91,540)</b>	
<b>6000 - Capital Outlay</b>																
6901 Depreciation Expense	2,943	6,356	6,356	9,719	9,719	9,719	10,322	10,572	10,572	10,572	10,572	10,572	10,572	107,994	(55,222)	
<b>Total 6000 - Capital Outlay</b>	<b>2,943</b>	<b>6,356</b>	<b>6,356</b>	<b>9,719</b>	<b>9,719</b>	<b>9,719</b>	<b>10,322</b>	<b>10,572</b>	<b>10,572</b>	<b>10,572</b>	<b>10,572</b>	<b>10,572</b>	<b>10,572</b>	<b>107,994</b>	<b>(55,222)</b>	
<b>TOTAL EXPENSE</b>	<b>343,816</b>	<b>521,317</b>	<b>558,562</b>	<b>598,129</b>	<b>523,416</b>	<b>710,756</b>	<b>572,700</b>	<b>637,315</b>	<b>637,315</b>	<b>637,315</b>	<b>617,165</b>	<b>630,165</b>	<b>-</b>	<b>6,987,969</b>	<b>(2,858)</b>	
<b>NET INCOME</b>	<b>(218,186)</b>	<b>(177,732)</b>	<b>208,546</b>	<b>873,079</b>	<b>29,563</b>	<b>(185,799)</b>	<b>34,030</b>	<b>(52,114)</b>	<b>237,012</b>	<b>(128,473)</b>	<b>(108,323)</b>	<b>(53,463)</b>	<b>(327,326)</b>	<b>130,814</b>	<b>100,480</b>	
<b>Operating Income</b>														<b>238,808</b>		
<b>EBITDA</b>														<b>238,808</b>		
<b>Beginning Cash Balance</b>	2,349,524	2,454,553	2,588,487	2,826,934	2,910,377	2,954,391	2,762,557	2,840,734	2,799,193	3,046,777	2,928,876	2,831,125	2,488,919	2,349,524	(67,192)	
<b>Cash Flow from Operating Activities</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Net Income	(218,186)	(177,732)	208,546	873,079	29,563	(185,799)	34,030	(52,114)	237,012	(128,473)	(108,323)	(53,463)	(327,326)	130,814	100,480	
Change in Accounts Receivable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Prior Year Accounts Receivable	513,333	302,790	38,162	-	6,877	59,196	9,001	-	-	-	-	-	-	929,359	871,800	
Current Year Accounts Receivable	-	-	-	-	-	-	-	-	-	-	-	-	(394,839)	(394,839)	(256,419)	
Change in Due from	299	-	-	(1)	-	-	1	-	-	-	-	-	-	299	299	
Change in Accounts Payable	(183,085)	(31,034)	(33,504)	47,487	(36,611)	3,719	60,746	-	-	-	-	31,588	-	(140,695)	(124,289)	
Change in Due to	(478)	(753)	(29,784)	(35,144)	(685)	(66,872)	(33,748)	-	-	-	-	(278,882)	722,165	275,819	956,454	
Change in Payroll Liabilities	(69,662)	43,245	33,138	3,683	19,560	(24,795)	(7,372)	-	-	-	-	-	-	(2,204)	(2,204)	
Change in Prepaid Expenditures	44,295	(1,709)	(48)	-	-	(50)	-	-	-	-	-	(52,021)	-	(9,533)	38,796	
Change in Deferred Revenue	-	-	-	(776,913)	-	-	-	-	-	-	-	-	-	(776,913)	(776,913)	
Change in Other Long Term Assets	15,571	15,576	15,581	15,586	15,592	15,597	15,602	-	-	-	-	-	-	109,105	-	
Depreciation Expense	2,943	6,356	6,356	9,719	9,719	9,719	10,322	10,572	10,572	10,572	10,572	10,572	10,572	107,994	55,222	
<b>Cash Flow from Investing Activities</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Capital Expenditures	-	(22,804)	-	(54,053)	-	(2,550)	(10,405)	-	-	-	-	-	-	(89,812)	(8,812)	
<b>Ending Cash Balance</b>	<b>2,454,553</b>	<b>2,588,487</b>	<b>2,826,934</b>	<b>2,910,377</b>	<b>2,954,391</b>	<b>2,762,557</b>	<b>2,840,734</b>	<b>2,799,193</b>	<b>3,046,777</b>	<b>2,928,876</b>	<b>2,831,125</b>	<b>2,488,919</b>	<b>2,488,919</b>	<b>2,488,919</b>	<b>896,328</b>	

**Journey School  
Financial Analysis  
January 2024**

**Net Income**

Journey School is projected to achieve a net income of \$130,814 in FY23-24 compared to \$30,334 in the board-approved budget. This is \$100,814 more than the board-approved budget.

**Balance Sheet**

As of January 31, 2024, the school's cash balance was \$2,840,734. By June 30, 2024, the school's cash balance is projected to be \$2,488,919.

As of January 31, 2024, the Accounts Receivable balance was \$440,167.

As of January 31, 2024, the Accounts Payable balance, including payroll liabilities, totaled \$463,275.

**Income Statement**

*Revenue*

Total revenue for FY23-24 is projected to be \$7,118,783, which is \$103,339 more than the budgeted amount.

- State Mental Health is projected to be \$44,268 over budget as the state funding model has changed. These funds will be sent directly to the school starting this year.
- Interest and Increase in Investments are projected to be \$58,000 over budget combined due to higher earnings from the treasury account and earnings from the investment accounts.

*Expenses*

Total expenses for FY23-24 are projected to be \$6,987,969, which is \$2,858 more than the budgeted amount.

- Certificated Salaries are projected to be \$169,392 under budget primarily due to the counselors being moved to classified salaries.
- PERS is projected to be \$40,789 under budget due to less staff being eligible.
- All Other Consultants are projected to be \$45,156 over budget due to the fees for the Employee Retention Credit consultant.
- Depreciation is projected to be \$55,222 over budget due to the installation of Shade Sails and Fence.

Note- Forecast variances of \$30,000 and 10% of budget will be discussed in this report.



## **ADA**

The budgeted P2 ADA is 540.11 based on an enrollment of 580 and a 93.1% attendance rate.

Month 1 ADA: 561.33

Month 5 ADA: 542.53

Month 2 ADA: 560.10

Month 3 ADA: 546.50

Month 4 ADA: 531.79

P1 ADA: 551.32

Note- Forecast variances of \$30,000 and 10% of budget will be discussed in this report.

**Journey School  
Check Register  
For the Month Ending January 31, 2024**

Check #	Vendor Name	Date Description	Amount
1006503	STS EDUCATION	1/2/2024 (34) DELL LAPTOPS	14,654.00
1006504	SOUTHERN CALIFORNIA EDISON	1/8/2024 11/29/23-12/28/23 - ELECTRIC	4,915.77
2496M	PRO GREEN CARPET CLEAN	1/8/2024 12/23 - CARPET CLEANING SERVICE	738.75
A014421	GOTO COMMUNICATIONS, INC	1/8/2024 01/24 - PHONES	832.31
A014422	KAISER PERMANENTE (3383)	1/8/2024 02/24 - HEALTH PREMIUM	20,298.33
A014423	GREAT AMERICAN INSURANCE CO	1/8/2024 12/23 - INSURANCE PREMIUM	1,998.29
A014424	OC DAVOC ENTERPRISES, INC. MOBILE RELAY ASSOCIATES, LLC,	1/8/2024 12/23 - JANITORIAL SERVICES	8,253.59
E013081	DBA. RAYCOM	1/8/2024 01/01/24-12/31/24 - RADIO RELAY SERVICE	100.00
E013082	ADVANCED OFFICE	1/8/2024 12/23/23-01/22/24 - COPIER LEASE	603.14
P047430	MOULTON NIGUEL WATER 3587	1/8/2024 11/19/23-12/18/23 - WATER SERVICES	191.74
P047431	MOULTON NIGUEL WATER 3586	1/8/2024 11/19/23-12/18/23 - WATER SERVICES	235.50
1006505	SARAH KANDEL	1/9/2024 REIM092823SK	30.00
2497M	JMG SECURITY SYSTEMS, INC.	1/9/2024 12/23 - SECURITY EQUIPMENT INSTALLATION	7,855.37
2498M	REI SHADE SYSTEMS	1/9/2024 12/23 - SHADE SAIL INSTALLATION - FINAL 12/23 - INSTRUCTIONAL AIDES & SUBSTITUTE	2,550.00
1006506	STRATEGIC KIDS, LLC	1/16/2024 TEACHERS	13,403.00
2499M	WELLS FARGO	1/16/2024 12/23 - CREDIT CARD PURCHASES	659.77
2500M	FIRST NATIONAL BANK OF OMAHA	1/16/2024 12/23 - CREDIT CARD PURCHASES 11/26/23-12/25/23 - PHONE & HOTSPOT FOR	5,412.26
A014546	VERIZON WIRELESS	1/16/2024 FACULTY USE	72.34
E013194	CR&R INCORPORATED	1/16/2024 01/24 - LATE FEE	609.37
E013195	WESTERN EXTERMINATOR	1/16/2024 12/23 - PEST CONTROL MAINTENANCE	298.30
E013196	MCGRAW HILL LLC	1/16/2024 MATH WORKBOOKS	139.50
P047778	UNITED HEALTHCARE	1/16/2024 01/24 - HEALTH PREMIUM	18,228.84
P047779	LINDSAY FREDERIKSEN	1/16/2024 AMAZON - FLUTE OIL, BAGS, FEATHERS	32.63
P047780	VIVIENE BENJAMIN	1/16/2024 REIM - RIBBON, BERRIES	46.12
P047781	QUADIANT FINANCE USA, INC.	1/16/2024 12/23 - POSTAGE METER RENTAL & LATE FEE	117.27
P047782	STRATEGIC KIDS, LLC	1/16/2024 12/23 - ELOP LEAD & INSTRUCTORS MULTIPLE VENDORS - GROCERIES & SUPPLIES	3,372.00
P047783	BRANDON WICKES	1/16/2024 FOR COOKING CLASS	201.53
2501M	GAVIN KELLER	1/18/2024 VOID - \$6,995.91 - VOID	0.00
1006507	CAPISTRANO UNIFIED SCHOOL	1/22/2024 REIM103123	251.52
1006508	DISTRICT	1/22/2024 09/23 - FIELD TRIP TRANSPORTATION	7,124.00
A014682	EARTHROOTS FIELD SCHOOL, INC.	1/22/2024 01/24 - ECO-LITERACY INSTRUCTION	2,277.78
E013313	COX COMMUNICATIONS	1/22/2024 01/08/24-02/07/24 - INTERNET & TELECONNECT	168.12
E013314	DEPARTMENT OF JUSTICE SEGERSTROM CENTER FOR THE	1/22/2024 12/23 - FINGERPRINTS	141.00
P048144	ARTS	1/22/2024 03/24 - WONDER & IMAGE PLAY TICKETS	225.00
P048145	CAPISTRANO UNIFIED SCHOOL	1/22/2024 MCKINNEY VENTO - MILEAGE	10.49
P048146	DISTRICT	1/22/2024 10/23 - FIELD TRIP TRANSPORTATION FY23-24 - WORKERS COMPENSATION PREMIUM	564.91
P048147	MARSH & MCLENNAN AGENCY LLC	1/22/2024 (7 OF 10)	3,150.00
P048148	AMANDA SIMMONS	1/22/2024 MULTIPLE VENDORS - LUMBER, PLANTS	132.48
P048149	JOY HALVERSON	1/22/2024 CUSTOM INK - MEDIEVAL GAMES T-SHIRTS	3,173.73
2502M	COLONIAL LIFE	1/23/2024 02/24 - INSURANCE PREMIUM	622.89
2503M	GUARDIAN	1/24/2024 02/24 - HEALTH PREMIUM	2,235.99
1006509	HEATHER BOLEY	1/29/2024 REIM082523HB	20.63
1006510	NICOLA WELLNER	1/29/2024 REIM061923NW 12/23 - MANAGEMENT CONTRACT FEE &	229.44
1006511	EXCELLENT EDUCATION DEVELOPMENT	1/29/2024 PAYCHEX FEES	12,609.52
E013418	WESTERN EXTERMINATOR	1/29/2024 01/24 - PEST CONTROL MAINTENANCE	298.30
E013419	ALPINE FRESH USA	1/29/2024 12/23 - BOTTLED WATER SERVICE	337.00
P048492	UNITED HEALTHCARE	1/29/2024 02/24 - HEALTH PREMIUM	17,364.84
P048493	KRISTIN KILCOLLINS CAPISTRANO UNIFIED SCHOOL	1/29/2024 TARGET - CONFERENCE MEAL, NATOMA INN -	69.28
P048494	DISTRICT	1/29/2024 DOCUMENT PRINTING	419.06
P048495	JOY HALVERSON	1/29/2024 YORBA LINDA FEED STORE - STRAW BALES	1,691.68

**Journey School  
Check Register  
For the Month Ending January 31, 2024**

<b>Check #</b>	<b>Vendor Name</b>	<b>Date Description</b>	<b>Amount</b>
2504M	JUNK KING	1/31/2024 01/24 - JUNK REMOVAL	620.00
<b>Total</b>			<b>159,587.38</b>

# Journey School School Calendar: 2024-25

Attendance Month	Week #	Calendar Month	M	T	W	TH	F	Staff Days	Student Days	Min. Days					
												<b>Draft 2.12.24</b>			
	1	Aug	26	27	28	29	30	5	0	0		pre-service/pupil-free days 8/26-8/30 and 9/3	Minimum Day grades 1-8		
	2	Sept	2	3	4	5	6	4	3	1		First day of school 9/4 & short day kinder	Labor Day 9/2		
	3		9	10	11	12	13	5	5	1					
	4		16	17	18	19	20	5	5	1		Back to School Night 9/18			
Month 1	18		23	24	25	26	27	5	5	1		Attendance months			
	6	Oct	30	1	2	3	4	5	5	1					
	7		7	8	9	10	11	5	5	1					
	8		14	15	16	17	18	5	5	1					
Month 2	20		21	22	23	24	25	5	5	1					
	10	Nov	28	29	30	31	1	5	4	4		Inservice/pupil-free day 11/1	Minimum days - conference week		
	11		4	5	6	7	8	5	5	1					
	12		11	12	13	14	15	4	4	1		Veterans' Day 11/11			
Month 3	18		18	19	20	21	22	5	5	1					
	14		25	26	27	28	29	0	0	0		Fall Break			
	15	Dec	2	3	4	5	6	5	5	1					
	16		9	10	11	12	13	5	5	1		End of P1/M4 is 12/19			
Month 4	14		16	17	18	19	20	4	4	2		Winter Break			
	18		23	24	25	26	27	0	0	0		Winter Break			
	19	Jan	30	31	1	2	3	0	0	0		Winter Break			
	20		6	7	8	9	10	5	5	1					
	21		13	14	15	16	17	5	5	1					
	22		20	21	22	23	24	4	4	1		Martin L King Day 1/20	Progress Reports Due January 24		
Month 5	19		27	28	29	30	31	5	5	1					
	24	Feb	3	4	5	6	7	5	5	1					
	25		10	11	12	13	14	4	4	1		Presidents' Day 2/14 and 2/17			
	26		17	18	19	20	21	4	4	4		Minimum days - conference week			
Month 6	18		24	25	26	27	28	5	5	1					
	28	March	3	4	5	6	7	5	5	1					
	29		10	11	12	13	14	5	5	1					
	30		17	18	19	20	21	5	5	1					
Month 7	20		24	25	26	27	28	5	5	1		End of P2/M7 is 3/29			
	32	April	31	1	2	3	4	5	5	1					
	33		7	8	9	10	11	0	0	0		Spring Break			
	34		14	15	16	17	18	5	5	1					
	35		21	22	23	24	25	5	5	1					
Month 8	19	May	28	29	30	1	2	5	4	1		Inservice/pupil-free day 4/28			
	37		5	6	7	8	9	5	5	1					
	38		12	13	14	15	16	5	5	1			CAASP testing window TBD in May		
	39		19	20	21	22	23	5	5	1					
Month 9	19		26	27	28	29	30	4	4	1		Memorial Day 5/26			
	41	June	2	3	4	5	6	5	5	1					
Month 10	10		9	10	11	12	13	5	5	2		Last day of school 6/13 min day & short day kinder			
	43		16	17	18	19	20	3	0	0		Inservice/Pupil-Free (2 days Report Cards)	End Year Progress Reports Due June 20		
	44		23	24	25	26	27	5	0	0		Teachers work a total of 5 days for summer training, with admin approval of days			
	45	July	30	1	2	3	4	0	0	0		July 4th Holiday - Office CLOSED	June 19th - Juneteenth Holiday		
	46		7	8	9	10	11	5	0	0					
	47		14	15	16	17	18	5	0	0					
	48		21	22	23	24	25	5	0	0					
	49	Aug	28	29	30	31	1	5	0	0					
	50		4	5	6	7	8	5	0	0					
	51		11	12	13	14	15	5	0	0					
	52		18	19	20	21	22	5	0	0					
<b>Total Teacher Days</b>								<b>191</b>							
<b>Total Student Days</b>								<b>175</b>							
<b>Total Minimum Days</b>												<b>45</b>			



**JOURNEY SCHOOL**

**2024-2025**

draft V.1

**Instructional minutes calculation:**

					JOURNEY	TOTALS	Regular Requirement	Grade level
Kindergarten REG	130	days	@	225	29,250	<b>38,265</b>	36,000	K
Kindergarten 1st/Last Day of School	2	days	@	120	240			
Kindergarten MIN	45	days	@	195	8775			
Grades 1-3 REG	130	days	@	315	40950	50,400	1 to 3	
Grades 1-3 MIN	45	days	@	215	9675			50,625
Grades 4-8 REG	130	days	@	335	43,550	54,000	4 to 8	
Grades 4-8 MIN	45	days	@	240	10,800			54,350

**Bell Schedule:**

**NOTE: STAGGERED BELL SCHEDULE FOR START/END TIMES**

Total

Kindergarten regular days	9:00	AM	to	12:45	PM	225
Kindergarten 1st/Last Day of School	9:00	AM	to	11:00	AM	120
Kindergarten min days	9:00	AM	to	12:15	PM	195
Grades 1-3, all days, morning lesson	8:40	AM	to	10:20	AM	100
Grades 1-3, all days period 1	10:40	AM	to	11:35	PM	55
Grades 1-3, minimum days period 2, chores and closing	12:00	PM	to	1:00	PM	60
Grades 1-3, regular days period 2 and period 3	12:05	PM	to	1:40	PM	95
Grades 1-3, regular days, period 4 & closing	2:00	PM	to	3:05	PM	65
Grades 4-8, all days, morning lesson	8:40	AM	to	10:40	AM	120
Grades 4-8, regular days, period 1 and period 2	10:55	AM	to	12:45	AM	110
Grades 4-8, minimum days, period 1 and period 2 & closing	11:00	AM	to	1:00	PM	120
Grades 4-8, regular days, period 3, 4, & closing	1:20	PM	to	3:05	PM	105

**Total Minutes**

Kindergarten regular day total	240
Kindergarten 1st/Last Day of School	120
Kindergarten minimum day	210
Grade 1-3 regular day total	315
Grade 1-3 minimum day	215
Grade 4-8 regular day total	335
Grade 4-8 minimum day total	240



**2023-2024 LCAP  
MID-YEAR UPDATE**

**GOAL 1: Develop and enhance appropriate supports and interventions to meet the academic, behavioral, and social-emotional needs of at-risk students.**

**Measuring and Reporting Results**

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	2023-2024 Mid-Year Update	Desired Outcome for 2023–24
Referral Rates to Student Study Team (Social, emotional, behavioral and academic needs combined)	11% of students referred to at least one team meeting (2018-2019 data)	16.3% of students were referred to at least one team meeting	16.4% of students were referred to at least one team meeting	6% of students have been referred to at least one team meeting. An additional 4% have plans from last year that are effective and these students have not been referred to follow up meetings this year.	Decrease to less than 10%
Suspension Rate	2.6% of students suspended at least one day (2018-2019)	.9% of students were suspended at least one day (2020-2021 Results)	.9% of students were suspended at least one day (2021-2022 Results)	1.5% of students were suspended at least one day (2022-2023 Results)	Maintain a sub 1% suspension rate
Percentage of Special Education (SPED) students achieving SBAC met/exceeded status	28.85% ELA and 17.31% Math (2018-2019)	45.65% ELA and 23.92% Math (2020-2021 Results)	46.30% ELA and 31.49% Math (2021-2022 Results)	30.88% ELA and 17.64% Math (2022-2023 Results)	Increase ELA scores and math scores by 5% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	2023-2024 Mid-Year Update	Desired Outcome for 2023–24
Percentage of Socio Economically Disadvantaged (SED) students achieving SBAC met/exceeded status	47.6% ELA and 38.1% Math (2018-2019)	51.51% ELA and 27.27% Math (2020-2021 Results)	57.90% ELA and 35.09% Math (2021-2022 Results)	44% ELA and 37.34% Math (2022-2023 Results)	Increase ELA scores and math scores by 5% each year
Percentage of English Language Learner (EL) students achieving SBAC met/exceeded status	41% ELA and 44.8% Math (2018-2019)	53.85% ELA and 30.77% Math (2020-2021 Results)	In order to protect student privacy, data is suppressed because 10 or fewer EL students tested.	In order to protect student privacy, data is suppressed because 10 or fewer EL students tested.	Increase ELA scores and math scores by 5% each year
SAEBRS (Social, Academic, Emotional Behavior Risk Screener)	84% of students are low risk whereas 16% of students are in elevated risk categories	NA	Established baseline of 84% of students are low risk whereas 16% of students are in elevated risk categories. (2022-2023 Results)	85% of students are low risk whereas 15% of students are in elevated risk categories.	Maintain greater than 80% of student population in low risk category and less than 20% in elevated risk categories

## Actions

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 1]	Fund access to mentorship and Professional Development	Provide mentorship and professional development opportunities for staff members focused on IEP implementation, classroom management, behavior and discipline practices	Conscious Discipline training and various other opportunities for professional development have been pursued, including attendance at the Alliance for Public Waldorf Education conference.	\$34,409	\$59,785	N
[Action 2]	Fund specialized Staff Members	Fund and retain the following positions in the staffing plan: school counselor, school nurse, and behavioral support providers	Journey School retained the following positions as planned: school counselor, school nurse, and behavioral support providers. Additionally, we have increased counselor support and behavioral support on campus.	\$153,597	\$70,196	Y
[Action 3]	Implement SE Curriculum	Implement social-emotional learning curriculum (Positive Outcomes), Compassionate Campus activities, civics classes and student access to field trips and overnight excursions	Journey School devotes 45 minutes weekly towards compassionate campus and 45 minutes weekly towards Digital Media Literacy (6 <sup>th</sup> -8 <sup>th</sup> grade). It should be highlighted that social-emotional learning is embedded throughout the school day and not merely isolated during these instructional periods. Journey also coordinates access to field trips and overnight excursions that further social-emotional learning.	\$167,957	\$105,548	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 4]	Increase Student Supervision	Increase campus supervision at recess and lunch times and provide training for campus supervisors	The number of supervisors assigned to recess and lunch times has increased. We are also developing a potential volunteer base to help support supervision.  Additionally, aides continue to provide supervision and support in the classrooms during instructional periods	\$214,808	\$305,189	N
[Action 5]	Fund Student Support Services	Assign academic interventionists and teachers on special assignment to various grade bands	Journey has continued partnership with Strategic Kids to increase paraprofessional support focused on academic intervention/support.	\$100,347	\$237,185	Y
[Action 6]	Additional Counseling Support	Hire a second counselor to support counseling efforts	A second counselor was hired	\$33,576	\$79,390	Y
[Action 7]	Special Education Services	Contract with CUSD for provision of Special Education Services on the Journey School campus.	Journey continues to contract with CUSD for provision of Special Education Services.	\$121,800	\$270,055	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 8]	Hire Director of Special Education	Hire and administrator to serve as a liaison between CUSD and Journey School employees, sit in on IEP meetings, serve as the 504 Coordinator, lead the Care Stream/SST, and ensure delivery of high quality supports and interventions for students in all settings across the program.	Journey hired a Director of Student Services and the job description for this role encompasses the details of the proposed action.	\$56,473	\$117,288	N

**GOAL 2: Students in TK-8 will demonstrate academic growth and proficiencies needed to ensure they are progressing towards high school readiness.**

**Measuring and Reporting Results**

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	2023-2024 Mid-Year Update	Desired Outcome for 2023–24
Percentage of All Students achieving SBAC met/exceeded status	57.93 % ELA and 45.45% Math (2018-2019)	59.92 % ELA and 45.73% Math (2020-2021 Results)	65.38% ELA and 52.80% Math (2021-2022 Results)	55.30% ELA and 45.98% Math (2021-2022 Results)	Increase ELA scores and math scores by 5% each year
Percentage of All Students achieving CAST met/exceeded status	46.39 % Science (2018-2019)	41.86% Science (2020-2021 Results)	44.71% Science (2021-2022 Results)	30.18% Science (2022-2023 Results)	Increase baseline CAST scores by 5%
Interim ELA and Math assessments (Illuminate Education)	Wasn't established/available	25% of Students are in the elevated risk categories for ELA (2021-2022 Results)  37% of students are in the elevated risk categories for Math (2021-2022 Results)	31% of Students are in the elevated risk categories for ELA (2022-2023 Results)  36% of students are in the elevated risk categories for Math (2022-2023 Results)	27.5% of students are in the elevated risk categories for ELA (Fall 2023-2024 Results)  27.5% of students are in the elevated risk categories for Math (Fall 2023-2024 Results)	Reduce Year 1 rate of students in elevated risk categories by 5% for ELA and 10% for math



## Actions

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 1]	Learning Materials and Supplies	Procure high quality supplies and learning materials that support delivery of a Waldorf inspired education	Journey School continues to purchase a variety of high-quality learning supplies and materials for student use and delivery of a Waldorf inspired education	\$48,587	\$116,720	N
[Action 2]	Student Support Services	Assign academic interventionists and teachers on special assignment to various grade bands	Journey employs two TOSAS and has a variety of academic interventionists supporting students in the general education setting.	\$212,048	\$287,518	Y
[Action 3]	Mentorship and Professional Development	Provide ongoing training and staff development opportunities in core academic areas and use of data to drive lesson plans	Journey continues to offer access to a Waldorf certification program developed on our campus. Mentorship is part of this program.	\$10,757	\$38,365	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 4]	Curriculum	Provide access to a thorough and rigorous course of study at each grade level, using research-based core curriculum and methods of instruction	Journey School continues to utilize a variety of evidence based curricular resources and Waldorf inspired resources in the classrooms.	\$27,531	\$75,786	N
[Action 5]	Literature	Procure high quality reading material and improved access to literature in every classroom library	Journey School has purchased a variety of books this year including reading sets aligned to grade level curriculum	\$1,946	\$4,000	N
[Action 6]	High Quality Instruction	Retain high performing teachers and support their effort in developing a dynamic educational experience rooted in the core principles of Public Waldorf education.	Journey School retention rate remains high. In a recently completed intent to return form, all but one individual plans to return for the 24-25 school year.	\$846,800	\$1,655,328	N
[Action 7]	Middle School "Honors" Track	Develop "honors" or accelerated programming in the middle school to ensure a seamless transition and access for students wishing to pursue high school honors/AP tracks	Honors and accelerated programming are currently available in for our middle school students.	\$19,884	\$46,459	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 8]	Access to a Broad Course of Study	Hire and retain high performing specialty and elective teachers to support and educational experience rooted in the core principals of public Waldorf education	A broad variety of classes continue to be available at Journey School with farming and Spanish as new additions for many grades this year.	\$245,774	\$578,241	N

**GOAL 3: Improve attendance rates for all students and all subgroups and increase parent engagement across the program.**

**Measuring and Reporting Results**

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	2023-2024 Mid-Year Update	Desired Outcome for 2023–24
Average Daily Attendance Rate	95.5% ADA (2018-2019)	92.2% ADA	92.1% ADA (through P2)	93.7 ADA (at P1)	Return ADA to baseline rate (pre-pandemic rate)
Chronic Absenteeism Rate (ALL STUDENTS)	11.2% of Students (2018-2019)	28% all students (2021 Dashboard)	31.3% All students (2022 Dashboard)	22% of ALL Students are Chronically Absent (129 students)	Less than 15% ALL Students

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	2023-2024 Mid-Year Update	Desired Outcome for 2023–24
Chronic Absenteeism Rate (Subgroup: Asian)	28.9% Chronically Absent (2022 Dashboard)	New metric starting Year 2	28.9% Chronically Absent (2022 Dashboard)	15% Chronically Absent (129 students)	Less than 15%
Chronic Absenteeism Rate (Subgroup: English Learners)	24.4% Chronically Absent (2022 Dashboard)	New metric starting Year 2	24.4% Chronically Absent (2022 Dashboard)	17% Chronically Absent (6 students)	Less than 15%
Community Satisfaction/School Input Survey	91% Satisfied and/or Neutral Rate (2018-2019)	92% Satisfied and/or Neutral Rate (2021-2022)	88.7% Satisfied and/or Neutral Rate (2022-2023)	Survey has not been administered in 2023-2024 yet	Maintain rate in the 90 <sup>th</sup> percentile
Local Indicators on CA School Dashboard	Standard Met (2018-2019)	Standard Met (2021-2022)	Standard Met (2022-2023)	Local Indicators for 2023-2024 have not been finalized and reported on.	Maintain Standard Met

### Actions

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 1]	Improve Attendance Messaging and Attendance Tracking	Improve school messaging as it relates to student attendance, including contracting with a technology/program to provide access to a suite of attendance intervention services that includes automated delivery of attendance notes, reminders and compliance letters. We will also be implementing the CDE Attendance Works Toolkit and the strategies listed therein.	Automated messaging through ParentSquare is a new outreach effort this year as it relates to attendance.  Outreach for absent students is also occurring much earlier in the day than past years.	\$38,445	\$76,561	N
[Action 2]	Independent Study	Develop a temporary independent study policy and process to directly support students who are home ill and or traveling (but are still able to remain engaged and participating in school).	Several students have/are attending Independent Study for extended absences in an effort to remain engaged and continue their education while not on Journey's campus.	\$78,421	\$139,487	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 3]	Translation Services	Utilize translation services to prepare messages and letters to families in their primary language, including notes and letters outlining attendance expectations. Hire translators to join attendance meetings with families as needed.	Translation services are available and utilized by parents through ParentSquare and through our Report Card system.	\$424	\$2,600	N
[Action 4]	Parent Education	Develop and offer parent education resources and opportunities. "Coffee Talks" will be held monthly in coordination with Parent Cabinet meetings to help convey information transparently and build trust. The school will also be offering free access to a English class for adults through Saddleback CC.	3 coffee talks have been hosted so far this year, focused on various topics including School Safety, Social-Emotional Learning, and LCAP. While not occurring on a monthly basis, they are serving to provide an important forum for parent partnership.  The school also offered an English class for adults during the 1 <sup>st</sup> semester, however Saddleback cancelled registration for 2nd semester due to low participation/enrollment.	\$0	\$1,074	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 5]	"Clubs" and other learning opportunities	Develop and offer "clubs" for middle school students and related curricular/extracurricular opportunities that may increase student interest and connection to the school and peers.	Club opportunities continue to be offered for 6th – 8 <sup>th</sup> graders, with an expansion in the number of clubs available.	\$48,307	\$88,892	N
[Action 6]	Parent Partnership and Communications	Coordinate a variety of school events to encourage parent participation engagement, and community development within the school. Hire a communication coordinator that will focus on ParentSquare communications, weekly newsletters, social media posts, coordination of calendar and event planning, and reception.	A variety of events have been coordinated to encourage parent participation and engagement, including school wide socials and parent meetings held at the class level.  The communication coordinator role was split into a part time receptionist and a part time social media/communication expert.	\$65,718	\$155,159	N

Action #	Title	Description	2023-2024 Mid-Year Update	Expenditures Through 12/31/23	Budgeted Amount	Contributing
[Action 7]	Diversity, Equity and Inclusion	Support the Diversity, Equity and Inclusion working group to drive curricular enhancement and improve school climate in support of the school's vision	The Diversity, Equity and Inclusion working group continues to meet and a new pathway to coordinate with pedagogical council has been developed to ensure ideas, lessons and opportunities for students are enacted upon.	\$0	\$2,700	N
[Action 8]	Safe and Secure Learning Environment	Enhance security measures across campus, including fence and gate upgrades, additional staff presence at school entry and various trainings for school staff. Continue to provide high quality janitorial support.	Fencing and security gates have been installed on campus.  Additional staff presence are stationed at school entry points during high traffic periods.  High quality janitorial support continues to be contracted out to OC Janitorial	\$190,988	\$373,510	N



## Comprehensive School Safety Plan



Journey School  
27102 Foxborough  
Aliso Viejo  
CA 92656

(949) 448-7232

## School Site Mission

Journey School provides the families of southern California the option of a Waldorf-inspired public school education for their children. The school is dedicated to the optimal development of the intellect, social-emotional well-being, and physical capacities of each student. Journey School will enable each student to read, write, speak, and calculate with clarity and precision. Furthermore, students will have the ability to think imaginatively, creatively and become competent, life-long learners.

## Table of Contents

I. Child Abuse Reporting Procedures	3
II. Disaster Response Procedures	9
III. Suspension and Expulsion Procedures	50
IV. Bullying and Harassment Policy	57
V. School-wide Dress Code Prohibiting Gang Attire	61
VI. Teacher Notification of Dangerous Students	62
VII. Procedures for Safe Ingress and Egress of Pupils, Parents and Staff to and From School	63
VIII. Rules and Procedures on School Discipline	64
IX. Dangerous Weapons	65
X. Prevention of Gun Violence	65

## **I. Child Abuse Reporting Procedures**

### **Definitions**

Child abuse or neglect includes the following:

1. A physical injury or death inflicted by other than accidental means on a child by another person.
2. Sexual abuse of a child, including sexual assault or sexual exploitation, as defined in Penal Code 11165.1.
3. Neglect of a child as defined in Penal Code 11165.2.
4. Willful harming or injuring of a child or the endangering of the person or health of a child as defined in Penal Code 11165.3.
5. Unlawful corporal punishment or injury as defined in Penal Code 11165.4.

Mandated reporters include, but are not limited to, teachers; instructional aides; teacher's aides or assistants; classified employees; certificated pupil personnel employees; administrators and employees of a licensed day care facility; licensed nurses or health care providers; administrators and counselors.

Reasonable suspicion means that it is objectively reasonable for a person to entertain a suspicion, based upon facts that could cause a reasonable person in a like position, drawing when appropriate on his/her training and experience, to suspect child abuse or neglect. However, reasonable suspicion does not require certainty that child abuse or neglect has occurred nor does it require a specific medical indication of child abuse or neglect.

### **Reportable Offenses**

A mandated reporter shall make a report using the procedures provided below whenever, in his/her professional capacity or within the scope of his/her employment, he/she has knowledge of or observes a child whom the mandated reporter knows or reasonably suspects has been the victim of child abuse or neglect.

Any mandated reporter who has knowledge of or who reasonably suspects that a child is suffering serious emotional damage or is at a substantial risk of suffering serious emotional damage, based on evidence of severe anxiety, depression, withdrawal, or unto ward aggressive behavior towards self or others, may make a report to the appropriate agency.

Any school employee who reasonably believes that he/she has observed the commission of a murder, rape, or lewd or lascivious act by use of force, violence, duress, menace, or fear of immediate and unlawful bodily injury against a victim who is a child under age 14 shall notify a peace officer.

## **Responsibility for Reporting**

The reporting duties of mandated reporters are individual and cannot be delegated to another person.

When two or more mandated reporters jointly have knowledge of a known or suspected instance of child abuse or neglect, the report may be made by a member of the team selected by mutual agreement and a single report may be made and signed by the selected member of the reporting team. Any member who has knowledge that the member designated to report has failed to do so shall thereafter make the report.

No supervisor or administrator shall impede or inhibit a mandated reporter from making a report.

Any person not identified as a mandated reporter who has knowledge of or observes a child whom he/she knows or reasonably suspects has been a victim of child abuse or neglect may report the known or suspected instance of child abuse or neglect to the appropriate agency.

## **Reporting Procedures**

### **1. Initial Telephone Report**

Immediately or as soon as practicable after knowing or observing suspected child abuse or neglect, a mandated reporter shall make an initial report by telephone to any police department (excluding a school district police/security department), sheriff's department, county probation department if designated by the county to receive such reports, or county welfare department.

When the initial telephone report is made, the mandated reporter should note the name of the official contacted, the date and time contacted, and any instructions or advice received.

### **2. Written Report**

Within 36 hours of knowing or observing the information concerning the incident, the mandated reporter shall then prepare and either send, fax, or electronically submit to the appropriate agency a written follow-up report, which includes a completed Department of Justice form (SS 8572).

Reports of suspected child abuse or neglect shall include, if known:

- a. The name, business address, and telephone number of the person making the report and the capacity that makes the person a mandated reporter.
- b. The child's name and address, present location, and, where applicable, school, grade, and class.
- c. The names, addresses, and telephone numbers of the child's parents/guardians.

- d. The name, address, telephone number, and other relevant personal information about the person who might have abused or neglected the child.
- e. The information that gave rise to the reasonable suspicion of child abuse or neglect and the source(s) of that information.

The mandated reporter shall make a report even if some of this information is not known or is uncertain to him/her.

The mandated reporter may give to an investigator from an agency investigating the case, including a licensing agency, any information relevant to an incident of child abuse or neglect or to a report made for serious emotional damage pursuant to Penal Code 11166.05.

### **Release of Child to Peace Officer**

When a child is released to a peace officer and taken into custody as a victim of suspected child abuse or neglect, the School Director or designee shall not notify the parent/guardian, but rather shall provide the peace officer with the address and telephone number of the child's parent/guardian. It is the responsibility of the peace officer or agent to notify the parent/guardian of the situation. (Education Code 48906)

### **Parent/Guardian Complaints**

Upon request, the School Director or designee shall provide parents/guardians with a copy of this administrative regulation, which contains procedures for reporting suspected child abuse occurring at a school site to appropriate agencies.

To file a complaint against a district employee or other person suspected of child abuse or neglect at a school site, parents/guardians may file a report by telephone, in person, or in writing with any appropriate agency identified above under "Reporting Procedures." If a parent/guardian makes a complaint about an employee to any other employee, the employee receiving the information shall notify the parent/guardian of procedures for filing a complaint with the appropriate agency. The employee also is obligated pursuant to Penal Code 11166 to file a report himself/herself using the procedures described for mandated reporters.

In addition, if the child is enrolled in special education, a separate complaint may be filed with the California Department of Education pursuant to 5 CCR 4650.

### **Notifications and Training**

The School Director or designee shall provide to all new employees who are mandated reporters a statement that informs them of their status as mandated reporters, their reporting obligations under Penal Code 11166, and their confidentiality rights under Penal Code 11167.

Before beginning employment, any person who will be a mandated reporter by virtue of his/her position shall sign a statement indicating that he/she has knowledge of the

reporting obligations under Penal Code 11166 and will comply with those provisions. The School Director or designee shall retain the signed statement.

All employees will complete a training reviewing child abuse and responsibilities of mandated reporting. The training module will be compliant with AB 1432 and will be provided within the first 6 weeks of each school year or within 6 weeks of that person's employment.

**The School Director or designee also shall notify all employees that:**

1. A mandated reporter who reports a known or suspected instance of child abuse or neglect shall not be held civilly or criminally liable for making a report and this immunity shall apply even if the mandated reporter acquired the knowledge or reasonable suspicion of child abuse or neglect outside of his/her professional capacity or outside the scope of his/her employment. Any other person making a report shall not incur civil or criminal liability unless it can be proven that he/she knowingly made a false report with reckless disregard of the truth or falsity of the report.
2. If a mandated reporter fails to report an incident of known or reasonably suspected child abuse or neglect, he/she may be guilty of a crime punishable by a fine and/or imprisonment.
3. No employee shall be subject to any sanction by the school for making a report.

# SUSPECTED CHILD ABUSE REPORT

To Be Completed by Mandated Child Abuse Reporters  
Pursuant to Penal Code Section 11166

CASE NAME: \_\_\_\_\_

PLEASE PRINT OR TYPE

CASE NUMBER: \_\_\_\_\_

<b>A. REPORTING PARTY</b>	NAME OF MANDATED REPORTER		TITLE		MANDATED REPORTER CATEGORY					
	REPORTER'S BUSINESS/AGENCY NAME AND ADDRESS			Street	City	Zip	DID MANDATED REPORTER WITNESS THE INCIDENT? <input type="checkbox"/> YES <input type="checkbox"/> NO			
	REPORTER'S TELEPHONE (DAYTIME) ( )		SIGNATURE		TODAY'S DATE					
<b>B. REPORT NOTIFICATION</b>	<input type="checkbox"/> LAW ENFORCEMENT <input type="checkbox"/> COUNTY PROBATION		AGENCY							
	<input type="checkbox"/> COUNTY WELFARE / CPS (Child Protective Services)		ADDRESS			Street	City	Zip	DATE/TIME OF PHONE CALL	
	OFFICIAL CONTACTED - TITLE					TELEPHONE ( )				
<b>C. VICTIM</b> <small>One report per victim</small>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY			
	ADDRESS			Street	City	Zip	TELEPHONE ( )			
	PRESENT LOCATION OF VICTIM				SCHOOL	CLASS	GRADE			
	PHYSICALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO		DEVELOPMENTALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO		OTHER DISABILITY (SPECIFY)			PRIMARY LANGUAGE SPOKEN IN HOME		
	IN FOSTER CARE? <input type="checkbox"/> YES <input type="checkbox"/> NO		IF VICTIM WAS IN OUT-OF-HOME CARE AT TIME OF INCIDENT, CHECK TYPE OF CARE: <input type="checkbox"/> DAY CARE <input type="checkbox"/> CHILD CARE CENTER <input type="checkbox"/> FOSTER FAMILY HOME <input type="checkbox"/> FAMILY FRIEND <input type="checkbox"/> GROUP HOME OR INSTITUTION <input type="checkbox"/> RELATIVE'S HOME				TYPE OF ABUSE (CHECK ONE OR MORE) <input type="checkbox"/> PHYSICAL <input type="checkbox"/> MENTAL <input type="checkbox"/> SEXUAL <input type="checkbox"/> NEGLIGENCE <input type="checkbox"/> OTHER (SPECIFY)			
	RELATIONSHIP TO SUSPECT				PHOTOS TAKEN? <input type="checkbox"/> YES <input type="checkbox"/> NO		DID THE INCIDENT RESULT IN THIS VICTIM'S DEATH? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> UNK			
<b>D. INVOLVED PARTIES</b>	<b>VICTIMS/SIBLINGS</b>									
	1. NAME		BIRTHDATE	SEX	ETHNICITY	3. NAME		BIRTHDATE	SEX	ETHNICITY
	2. _____		_____		4. _____		_____		_____	
	<b>VICTIMS/PARENTS/GUARDIANS</b>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	HOME PHONE ( )	BUSINESS PHONE ( )	
		NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	HOME PHONE ( )	BUSINESS PHONE ( )	
	<b>SUSPECT</b>	SUSPECT'S NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	TELEPHONE ( )		
		OTHER RELEVANT INFORMATION								
<b>E. INCIDENT INFORMATION</b>	IF NECESSARY, ATTACH EXTRA SHEET(S) OR OTHER FORM(S) AND CHECK THIS BOX <input type="checkbox"/> IF MULTIPLE VICTIMS, INDICATE NUMBER: _____									
	DATE / TIME OF INCIDENT				PLACE OF INCIDENT					
	NARRATIVE DESCRIPTION (What victim(s) said/what the mandated reporter observed/what person accompanying the victim(s) said/similar or past incidents involving the victim(s) or suspect)									

SS 8572 (Rev. 12/02)

### DEFINITIONS AND INSTRUCTIONS ON REVERSE

**DO NOT** submit a copy of this form to the Department of Justice (DOJ). The investigating agency is required under Penal Code Section 11169 to submit to DOJ a Child Abuse Investigation Report Form SS 8583 if (1) an active investigation was conducted and (2) the incident was not determined to be unfounded.

WHITE COPY-Police or Sheriff's Department; BLUE COPY-County Welfare or Probation; GREEN COPY- District Attorney's Office; YELLOW COPY-Reporting Party

## DEFINITIONS AND GENERAL INSTRUCTIONS FOR COMPLETION OF FORM SS 8572

All Penal Code (PC) references are located in Article 2.5 of the PC. This article is known as the Child Abuse and Neglect Reporting Act, also known as CANRA. The Internet site is: <http://www.leginfo.ca.gov/calaw.html> (specify Penal Code and search for Sections 11164-11174.3). A mandated reporter must complete and submit the form SS 8572 even if some information is not known. (PC Section 11167(a).)

### I. MANDATED CHILD ABUSE REPORTERS

- Mandated child abuse reporters include all those individuals and entities as defined in PC Section 11165.7.

### II. TO WHOM REPORTS ARE TO BE MADE (DESIGNATED AGENCIES)

- Reports of suspected child abuse or neglect shall be made by mandated reporters to any police department or sheriff's department (not including a school district police or security department), county probation department (if designated by the county to receive mandated reports) or the county welfare department. (PC Section 11165.9.)

### III. REPORTING RESPONSIBILITIES

- Any mandated reporter who has knowledge of or observes a child, in his or her professional capacity or within the scope of his or her employment, whom he or she knows or reasonably suspects has been the victim of child abuse or neglect shall report such suspected instance of abuse or neglect to a designated agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof *within 36 hours* of receiving the information concerning the incident. (PC Section 11166(a).)
- No mandated reporter who reports a suspected instance of child abuse or neglect shall be held civilly or criminally liable for any report required or authorized by the CANRA. Any other person reporting a known or suspected instance of child abuse or neglect shall not incur civil or criminal liability as a result of any report authorized by the CANRA unless it can be proven the report was false and the person knew it was false or make the report with reckless disregard of its truth or falsity. (PC Section 11172(a).)

### IV. INSTRUCTIONS

- **SECTION A - REPORTING PARTY:** Enter the mandated reporter's name, title, category (from PC Section 11165.7), business (agency) name and address, telephone number, a signature and today's date. Also check yes-no whether you (the mandated reporter) witnessed the incident. The signature area is for either the mandated report or the person taking as telephoned report.

#### ETHNICITY CODES

1 Alaskan Native	6 Caribbean	11 Guamanian	16 Korean	22 Polynesian	27 White-Armenian
2 American Indian	7 Central American	12 Hawaiian	17 Laotian	23 Samoan	28 White-Central American
3 Asian Indian	8 Chinese	13 Hispanic	18 Mexican	24 South American	29 White-European
4 Black	9 Ethiopian	14 Hmong	19 Other Asian	25 Vietnamese	30 White-Middle Eastern
5 Cambodian	10 Filipino	15 Japanese	21 Other Pac Islndr	26 White	31 White-Romanian

### IV. INSTRUCTIONS (Continued)

- **SECTION B - REPORT NOTIFICATION:** Complete the name and address of the designated agency notified, date of the written report, date/time of the phone call and the name, title and telephone number of the official contacted.
  - **SECTION C - VICTIM** (One Report per Family, siblings must have same parents/guardians): Enter the victim's name, address, telephone number, birth date or approximate age, sex, ethnicity, present location, and where applicable enter the school, class (indicate the teacher's name or room number), and grade. List the primary language spoken in the victim's home. Check the appropriate yes-no box for: developmentally disabled?, physically disabled? and specify the victim's other disability. To determine if the victim has a disability, ask the victim's parent or care giver. Also check the appropriate yes-no box for in foster care?, indicate type of care if the victim was in out-of-home care, indicate the type of abuse. List the victim's relationship to the suspect, check the appropriate yes-no box for photos taken?, indicate whether the incident resulted in this victim's death.
  - **SECTION D - INVOLVED PARTIES:** Enter the requested information for: Victim's Siblings, Victim's Parents/Guardians and the Suspect.
  - **SECTION E - INCIDENT INFORMATION:** If multiple victims, enter the number. Enter date/time and place of the incident. Provide a narrative of the incident. Attach extra sheets if needed.
- ### V. DISTRIBUTION
- **Reporting Party:** After completing Form SS 8572, retain the yellow copy for your records and submit the top three copies to the designated agency.
  - **Designated Agency:** *Within 36 hours* of receipt of Form SS 8572, send **white copy** to police or sheriff, **blue copy** to county welfare or probation, and **green copy** to district attorney.



## II. Disaster Response Procedures

Journey School's disaster response procedures vary depending on the type, location and the severity of the emergency/disaster.

The following pages detail these disaster response procedures.

In accordance with SB 323, Journey School recognizes that the disaster response procedures must include adaptations for pupils with disabilities in accordance with the federal Individuals with Disabilities Education Act and Section 504 of the federal Rehabilitation Act of 1973. The Journey School campus and evacuation routes specified in this plan are accessible by students and remain in compliance with the Americans with Disabilities Act (ADA). Individualized Safety Plans will be developed for students who are unable to access the response procedures detailed below.

### Definitions/Overview

1. **“Code-Red”/Active Shooter** – Response initiated if an active shooter or immediate threat exists on campus. All campus activities and instruction are temporarily shut down.
2. **“Code Yellow”/Shelter in Place** – Response initiated if there is danger near campus or a situation occurs on campus that does not require the severity and immediacy of “Code Red” procedures. Campus activities and instruction may continue, however outside activity or room to room transit is not permitted.
3. **Drop, Cover & Hold** – Response initiated in the case of an earthquake. All campus activities and instruction are temporarily shut down until shaking stops and damage has been assessed.

**Building Evacuation** – Response initiated by a fire alarm or PA announcement or visible danger (fire, smoke, structural damage, etc.). All classes evacuate to the assembly area and campus activities and instruction are temporarily shut down until damage has been assessed.

**Site Evacuation** – Response initiated by city officials, emergency personnel, or administration. All classes evacuate campus and are relocated in a nearby location that is deemed safe or if necessary transported (in coordination with the school district) to a location deemed safe. Parents will be notified of the relocation via automated phone messages, emails and messages posted on Journey's website.

**Please note that Journey School will communicate and coordinate with offsite agencies (i.e.: Orange County Sheriff Department) if there is a large-scale emergency requiring multi-level coordination in parallel with one of the response options.**

## **“Code-Red”/Active Shooter Response**

Response initiated if an active shooter or immediate threat exists on campus. All campus activities and instruction are temporarily shut down.

### **Step 1: Always Be Aware**

- ⇒ Remain vigilant at all times while on campus (be aware of your surroundings)
- ⇒ Do not hesitate to alert the front office/administration/others of anything that might be out of the ordinary

### **Step 2: “Code Red” Announcement**

- ⇒ An announcement will be made over PA or by phone/text message if appropriate.
- ⇒ Listen for “Code Red” and the location of the threat/active shooter
- ⇒ Call 911

### **Step 3: Respond**

- ⇒ Respond immediately
- ⇒ Implement an **A.D.D.** mindset:

**AVOID**—do everything to avoid the active shooter.

1. Evacuate campus if you can safely do so
2. Find cover, behind a large item or enter the nearest building. Remain in a building or behind cover **ONLY** if you cannot leave campus
3. If you are off campus – remain off campus

**DENY**—do everything to lockdown the building and do everything to deny access to your location

1. Engage “Lock-Block” (door should already be locked)
2. Lock interior doors and windows
3. Secure/barricade doors if necessary
4. Turn off lights and close curtains (if available)
5. Line class up against wall nearest an exit
6. Remain still and silent and be prepared to exit the room quickly if needed.

**DEFEND**—you have a right to defend yourself, don’t be passive victims.

**Step 4: All Clear**

- ⇒ Remain in “Code Red” response until the “All Clear” is announced or emergency personnel provides other directions. An announcement will be made over PA or by phone/text message if appropriate
- ⇒ Follow all directions of emergency personnel if present
- ⇒ Gather at the assembly area or alternate location if campus evacuation and account for all students and staff members.

**Step 5: Responsibilities**

## ADMINISTRATION

1. Determine if site evacuation support is necessary and coordinate with district and community resources if necessary.
2. If site evacuation is not necessary, determine if school will be closed or continue for the duration of the day
3. In the event of evacuation, school will be closed and teachers will dismiss students directly to parents arriving at reunion site (Site to be determined by and communicated by administration at the time of the incident)
4. Communicate with families and media as appropriate
5. Assign duties and tasks and teams as appropriate/needed.
6. Manage Command Center

## TEACHERS

1. Escort students to a reunion site/assembly area or alternate location as indicated by administration and bring emergency supplies/”red backpack”
2. Take roll and inform administration of any missing students or injured students
3. Remain with students until parents arrive
4. Release students to parents who arrive – have parents sign out using student sign out sheets/attendance rosters

## ADMINISTRATIVE SUPPORT STAFF

1. Set up command center and bring emergency binders and supplies and radio sets/walkie talkies.
2. Report to assigned duty
3. Direct parents to classroom teachers to pick up their children at reunion site
4. Ensure teachers are utilizing student sign out sheets

## **“Code - Yellow”/Shelter-in-Place Response**

Response initiated if there is danger near campus or a situation occurs on campus that does not require the severity and immediacy of “Code Red” procedures. Campus activities and instruction may continue, however outside activity or room to room transit is not permitted.

### **Step 1: Be Aware**

- ⇒ Remain vigilant at all times while on campus (be aware of your surroundings)
- ⇒ Do not hesitate to alert the front office/administration/others of anything that might be out of the ordinary

### **Step 2: “Code Yellow” Announcement**

- ⇒ An announcement will be made over PA or by phone or text message if appropriate
- ⇒ Listen for “Code Yellow” or “Shelter in Place
- ⇒ Call 911

### **Step 3: Respond**

- ⇒ Respond immediately
  1. Enter the nearest building or stay put inside your building
  2. If you are off campus – remain off campus
  3. Engage “Lock-Block” (door should already be locked)
  4. Lock interior doors and windows and close curtains (if available)
  5. Continue instruction or activity

### **Step 4: All Clear**

- ⇒ Remain in “Code Yellow” response until the “All Clear” is announced or emergency personnel provides other directions. An announcement will be made over PA or by phone/text message if appropriate.
- ⇒ Follow directions of emergency personnel if present.
- ⇒ Gather at assembly area and account for all students and staff members

### **Step 5: Responsibilities**

#### ADMINISTRATION

1. Determine if school will be closed or continue for the duration of the

day.

2. If classes are actively locked down, direct parents who arrive to pick up to wait until lock down has been released.
3. If school closure ensure that teachers are prepared to dismiss students directly to parents arriving on campus from their classroom ramps
4. Communicate with families and media as appropriate
5. Assign duties and tasks and teams as appropriate/needed.
6. Manage Command Center

## TEACHERS

1. Escort students to assembly area and bring emergency supplies/"red backpack"
2. Take roll and inform administration of any missing students or injured students
3. Remain with students until parents arrive
4. Release students to parents who arrive at classroom ramp – have parents sign out using student sign out sheets/attendance rosters

## ADMINISTRATIVE SUPPORT STAFF

1. Set up command center and bring emergency binders and supplies and radio sets/walkie talkies.
2. Report to assigned duty
3. Direct parents to classroom teachers to pick up their children from the classrooms
4. Ensure teachers are utilizing student sign out sheets

## Earthquake - Drop, Cover and Hold Response

Response initiated in the case of an earthquake. All campus activities and instruction are temporarily shut down until shaking stops and damage has been assessed.

### Step 1: Respond

- ⇒ Drop, Cover, and Hold
- ⇒ If inside a building – crouch under furniture and cover head and neck with hands. Remain still until shaking stops.
- ⇒ If outside – proceed to an open space away from structures, trees, power lines, etc. Crouch and cover head and neck with hands. Remain still until shaking stops.

### Step 2: Evacuate

- ⇒ After shaking stops, take note of building condition and injured students or staff
- ⇒ Evacuate quickly and calmly (immobile students and staff may need to be left behind)
- ⇒ Remain aware during evacuation of falling debris and other hazards
- ⇒ Choose an alternate evacuation route if primary route is determined to be unsafe
- ⇒ Follow directions of emergency personnel if present
- ⇒ Gather at assembly area and account for all students and staff members

### Step 3: Responsibilities

#### ADMINISTRATION

1. Determine if site evacuation is necessary and coordinate with district and community resources if necessary.
2. If site evacuation is not necessary, determine if school will be closed or continue for the duration of the day
3. In the event of school closure, ensure that teachers are prepared to dismiss students directly to parents arriving on campus
4. Communicate with families and media as appropriate
5. Assign duties and tasks and teams as appropriate/needed.
6. Manage Command Center
7. Initiate a primary Search and Rescue effort

## TEACHERS

1. Escort students to assembly area and bring emergency supplies/"red backpack"
2. Take roll and inform administration of any missing students or injured students
3. Remain with students until parents arrive
4. Release students to parents who arrive – have parents sign out using student sign out sheets/attendance rosters
5. If assigned a Search and Rescue role, assign "neighbor" teacher supervision duties of class

## ADMINISTRATIVE SUPPORT STAFF

8. Set up command center and bring emergency binders and supplies and radio sets/walkie talkies.
9. Report to assigned duty
10. Direct parents to classroom teachers to pick up their children
11. Ensure teachers are utilizing student sign out sheets

## Evacuation/Site Evacuation Response

**Building Evacuation** – Response initiated by a fire alarm or PA announcement or visible danger (fire, smoke, structural damage, etc.). All classes evacuate to the assembly area and campus activities and instruction are temporarily shut down until damage has been assessed.

**Site Evacuation** –Response initiated by city officials, emergency personnel, or administration. All classes evacuate campus and are relocated in a nearby location that is deemed safe or if necessary transported (in coordination with the school district) to a location deemed safe. Parents will be notified of the relocation via automated phone messages, emails and messages posted on Journey’s website.

### Step 1: Respond

- ⇒ Pull alarm if smoke or fire is present
- ⇒ Call 911

### Step 2: Evacuate

- ⇒ Take note of building condition and injured students or staff
- ⇒ Evacuate quickly and calmly (immobile students and staff may need to be left behind)
- ⇒ Remain aware during evacuation of fire, falling debris and other hazards
- ⇒ Choose an alternative evacuation route if primary route is determined to be unsafe
- ⇒ Follow directions of emergency personnel if present
- ⇒ Gather at assembly area or alternate location and account for students and staff members

### Step 3: Responsibilities

#### ADMINISTRATION

1. Determine if site evacuation is necessary and coordinate with district and community resources if necessary.
2. If site evacuation is not necessary, determine if school will be closed or continue for the duration of the day
3. In the event of school closure, ensure that teachers are prepared to dismiss students directly to parents arriving on campus
4. Communicate with families and media as appropriate



5. Assign duties and tasks and teams as appropriate/needed.
6. Manage Command Center
7. Initiate a primary Search and Rescue effort

#### TEACHERS

1. Escort students to assembly area and bring emergency supplies/"red backpack"
2. Take roll and inform administration of any missing students or injured students
3. Remain with students until parents arrive
4. Release students to parents who arrive – have parents sign out using student sign out sheets/attendance rosters
5. If assigned a Search and Rescue role, assign "neighbor" teacher supervision duties of class

#### ADMINISTRATIVE SUPPORT STAFF

8. Set up command center and bring emergency binders and supplies and radio sets/walkie talkies.
9. Report to assigned duty
10. Direct parents to classroom teachers to pick up their children
11. Ensure teachers are utilizing student sign out sheets

### CAMPUS MAP – Assembly/Reunion Sites



### CAMPUS EVACUATION – Assembly/Reunion Sites

In the event of a campus evacuation, the safest and most convenient location will be determined by administration given the information available during an incident. An exact location and pick up/dismissal information will be communicated to families. School will be closed in the event of campus evacuation.

## SITUATIONAL COMMUNICATION PLANS

<p><b>911 Calls</b></p>	<ul style="list-style-type: none"> <li>• <b>When placing a 911 call: give your name, school name, and school address</b></li> <li>• <b>Give specific location of shooter, intruder, fire, hazardous material or other emergency</b></li> <li>• <b>Indicate location of incident command post</b></li> </ul>
<p><b>Mass Notification to Parents</b></p>	<p><b><u>During an emergency (if able to communicate with parents safely):</u></b></p> <p>Dear Parents,</p> <p>There is a situation occurring at Journey School that requires your attention (DETAILS PROVIDED). We understand that your first instinct as a parent is to drive to the school and pick up your child. Please remain calm and await further details prior to coming to campus. We will be in close contact with updates and you will be notified if there is a decision to close campus or evacuate the school site. Details will be provided at that time so that we can dismiss children to your care in a safe and organized manner. Thank you for your patience and understanding.</p> <p>Sincerely,</p> <p>Journey School Administration</p> <hr/> <p><b><u>After an emergency:</u></b></p> <p>Dear Parents,</p> <p>Journey School has been cancelled for the remainder of the day due to the following emergency. (DETAILS PROVIDED) Please report to campus and check in with a staff member at one of our reunion gates. The reunion gates are located at school gates: one by the bell tower and another in the back of campus near the community space. You must remain at the gate until your child is escorted to you. You will be required to sign him/her out. We thank you in advance for your cooperation and patience.</p> <p>If you are unable to pick up your child, please only send individuals listed on your child's emergency card. Children will not be released to carpools, etc. unless those individuals are listed on the child's emergency card.</p> <p>Sincerely ,</p> <p>Journey School Administration</p>

**CONTINGENCY PLANS:  
COMMUNICATION AND ELECTRICAL**

Describe a specific plan to provide for the following in the event of loss of services.

**PLAN FOR LOSS OF COMMUNICATION:**

**If no telephone service:**

-A robo-call can be made from any cell phone.
-The school website will be updated with pertinent information
-A mass email will also be sent

**If no Internet service:**

-A robo-call will be initiated using phone service/cellular service

**If no cellular, internet or telephone service:**

-Written communication and administrative presence will be available at all school entrances

**PLAN FOR LOSS OF ELECTRICITY:**

**List loss of services in event of electrical outage:**

-A robo-call will be initiated using phone service/cellular service

**BUILDING INFORMATION****SCHOOL SITE****DOCUMENT DATE**

<b>JOURNEY SCHOOL</b>	<b>1/22/24</b>
-----------------------	----------------

**EMERGENCY UTILITY SHUT-OFFS***Refer to campus map for additional information*

<b>UTILITY</b>		<b>YES</b>	<b>NO</b>	<b>LOCATION</b>
<b>Electrical</b>	<b>Total main electrical shutoff?</b>	<b>x</b>		<b>CAGED area adjacent to front playground</b>
<b>Gas</b>	<b>Total main gas shutoff?</b>		<b>X</b>	<b>N/A no gas on campus</b>
<b>Water</b>	<b>Total main water shutoff?</b>	<b>x</b>		<b>Front of school/Near parking lot entrance</b>

**EMERGENCY SUPPLIES**

<b>TYPE</b>	<b>LOCATION</b>
<b>Emergency Supply Kit</b>	<ul style="list-style-type: none"> <li>✓ <b>Class set in each classroom</b></li> <li>✓ <b>Office set located in Main Office and Development Office</b></li> <li>✓ <b>Medical Supplies in nurse bay</b></li> </ul>

**EMERGENCY PREPARATION****PREPARATION:****School Director, Office Staff, Support Staff**

1. Update Emergency Binders with:
  - a. Emergency evacuation plan
  - b. Evacuation Absence Lists
  - c. Class lists to be updated each semester (including parent contact)
  - d. Copies of Emergency Cards
  - e. Lists of staff members and phone numbers (cell and home)
  - e. Pen/Pencil
2. Plan for students with special needs/special medications stored in office
3. Conduct drills putting emergency teams into full operation.
4. Provide staff training and development
5. Have message tapes prerecorded for use during an emergency.
6. Update Emergency Response Boxes with:
  - a. Student lists with parent phone numbers (each semester)
  - b. Lists of students with special needs
  - c. Lists of staff members and phone numbers (cell and home)
  - d. Emergency supplies and lockdown kits
7. Each year in January, review and update emergency plan as necessary.

## **SECURITY, SEARCH & RESCUE TEAM**

***Fire and police personnel will probably conduct the sweep team process. If site staff is directed by fire personnel to conduct the sweep team process, utilize the following procedures.***

### **PREPARATION:**

1. Know the location of:
  - a. fire extinguishers
  - b. central cut-off for water and electricity
  - c. emergency supply/tool barrels

### **EMERGENCY:**

1. Check in with Command Center for sweep area assignment and master keys.
2. Get a walkie-talkie from Command Center, if available. Take all other supplies needed.
3. Initiate sweep of your designated area
4. If possible, sweep teams will sweep the campus in pairs, checking all rooms including storage areas, bathrooms, hallways, etc.
5. Assigned areas will be explored visually, vocally, and physically.
6. Proceed as quietly as possible in order to hear calls for help.
7. Upon entering an area, call out and wait for an answer. Then proceed with inspection of that area. If safe, actively search through the rubble.
8. Upon discovery of an injured person unable to walk, one member of the team is to remain with the individual while the other summons aid.
9. If possible, maintain communication with Command Center and First-Aid Team in case injuries occur or are discovered and to ensure that rescue aid is provided to those most in need.
10. Clearly mark each door with an X in masking tape (white means everything okay, red means victim is in room) after inspection is completed.
11. Sweep teams should always defer to directions from emergency personnel.
12. When search and rescue is complete, check in at the Command Center for next the assignment.

## **FIRST-AID TEAM**

### **PREPARATION:**

1. Keep all first aid kits updated and complete.
2. Develop triage procedures and forms.
3. Notify and update all team members of location of first aid supplies.

### **EMERGENCY**

Check in with Command Center.

1. Report to the first aid center.
2. Take student "health logs" to the first aid/triage area.
3. Take a walkie-talkie for communication.
4. Activate triage and administer first aid as necessary.
5. Assist emergency services with injured.
6. Maintain complete records of staff and/or students injured; nature of first aid administered; time, reason, destination, and names of all persons removed from site for emergency treatment.
7. Team members shall provide information regarding any first aid administered to accompany and person evacuated for further treatment.
8. Medical Team should always defer to directions given by emergency personnel





## EMERGENCY RESPONSES

This section establishes procedures to be followed that will minimize or nullify the effects of specific emergencies listed below and not referenced by the responses detailed above. The response procedures are intended primarily as a ready reference for all staff to be studied and practiced prior to the occurrence of an emergency.

The emergencies outlined in this section are:

- Accident at School .....
- Allergic Reaction .....
- Animal Disturbance .....
- Biological Agent Release .....
- Bomb Threat .....
- Chemical Accident (offsite) .....
- Chemical Accident (onsite) .....
- Civil Disobedience .....
- Death of a Student .....
- Death of a Staff Member .....
- Explosion.....
- Flood .....
- Hazardous Materials .....
- Kidnapping .....
- Medical Emergency .....
- Missing Student .....
- Motor Vehicle Crash.....
- Opioid Overdose.....
- Sexual Assault .....
- Storm/Severe Weather .....
- Suicide Attempt .....
- Utility Failure .....

Whether an accident is unintentional and results in minor injury or is the result of aggressive behavior on campus, it is important to complete a written report of the incident. Incident Report forms are available at the school office.

**STAFF ACTIONS:**

- Report accident to principal and school office.
- Provide for immediate medical attention, including performing necessary life-sustaining measures (CPR, etc.), until trained Emergency Medical Services technicians arrive.
- For relatively minor events, take students to school office or school nurse for assistance.
- Complete an Incident Report to document what occurred.

**SCHOOL DIRECTOR ACTIONS:**

- Provide appropriate medical attention. Call 911, if needed.
- Contact parents, guardians as appropriate to seek appropriate follow-up services, if needed.

**OTHER PREVENTATIVE/SUPPORTIVE ACTIONS:**

- Provide staff with a one-page list of emergency procedures in case of an accident or injury on the playground or in the building (e.g., First Aid Manual, Bloodborne Pathogen Program).
- Provide each teacher with information about students in his/her classroom having special medical or physical needs; such conditions might include allergies, fainting, seizures, or diabetes; include procedures that the teacher may follow in these specific emergencies.

There are many types of medical conditions that may trigger an allergic reaction, among them anaphylactic shock, diabetes and sickle cell anemia. Possible symptoms of an allergic reaction include skin irritation or itching, rash, hives, nasal itching or sneezing, localized swelling, swollen tongue, restlessness, sweating, fright, shock, shortness of breath, vomiting, cough and hoarseness. School nurses have a specialized health care plan for certain conditions and should be contacted for any sign of allergic reaction.

**STAFF ACTIONS:**

- If imminent risk, call 911.
- Send for immediate help (First Aid, CPR, medical) and medication kit (for known allergies).
- Notify School Director.
- Assist in getting "Epi" (Epinephrine) pen for individuals who carry them (usually in backpack), and prescription medications (kept by school nurse).
- If an insect sting, remove stinger immediately.
- Assess situation and help student/staff member to be comfortable.
- Move student or adult only for safety reasons.

**SCHOOL DIRECTOR ACTIONS:**

- If imminent risk, call 911 (always call 911 if using "Epi" pen).
- Notify parent or guardian.
- Administer medication, by order of a doctor, if appropriate; apply ice pack to affected area, keep victim warm or take other actions as indicated.
- Observe for respiratory difficulty.
- Attach a label to the person's clothing indicating: time & site of insect sting or food ingested, name of medicine, dosage and time administered.

**OTHER PREVENTATIVE/SUPPORTIVE ACTIONS:**

- Keep an "Epi" pen in the school office and notify staff as to location.
- Emergency health card should be completed by parents for each child and should be easily accessible by school personnel.
- Provide bus drivers with information sheets for all known acute allergic reactors.

If there is a rabid or uncontrollable animal on campus, implement this procedure when any wild animal threatens the safety of the students and staff

**SCHOOL DIRECTOR ACTIONS:**

- Isolate the students from the animal. Close doors and lock tables as a means to isolating the animal.
- If the animal is outside, keep students inside and institute **CODE YELLOW Response**
- If the animal is inside, initiate an **EVACUATION** outside to a protected area away from the animal
- Contact Animal Control for assistance in removing the animal.
- If the animal injures anyone, seek medical assistance from the school nurse.
- Notify parent/guardian and recommended health advisor.

**STAFF/TEACHER ACTIONS:**

- If the animal is outside, keep students inside. Lock doors and keep students away from the windows.
- If the animal is inside, **EVACUATE** students to a sheltered area away from the animal.
- Notify the School Director if there are any injuries.

In the event that the school receives a bomb threat by telephone, follow the Bomb Threat Checklist on the next page to document information about the threat. Keep the caller on the telephone as long as possible and listen carefully to all information the caller provides. Make a note of any voice characteristics, accents, or background noises and complete the Bomb Threat Report as soon as possible.

**PERSON RECEIVING THREAT BY TELEPHONE:**

- Listen. Do not interrupt caller.
- Keep the caller on the line with statements such as *"I am sorry, I did not understand you. What did you say?"*
- Alert someone else by prearranged signal to notify the telephone company to trace the call while the caller is on the line.
- Notify School Director immediately after completing the call.
- Complete the Bomb Threat Checklist.

**Telephone Bomb Threats**

- Remain calm/courteous.
- Read phone's visual display.
- Listen, don't interrupt.
- Keep caller talking. Pretend hearing difficulty.
- Notice details: background noises, voice description.
- Ask: When? Where? What? How?
- Don't touch any suspicious objects.

**Call 911****PERSON RECEIVING THREAT BY MAIL:**

- Note the manner in which the threat was delivered, where it was found and who found it.
- Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.
- Caution students against picking up or touching any strange objects or packages.
- Notify School Director

**SCHOOL DIRECTOR ACTIONS:**

- Call 911.
- Instruct staff and students to turn off any cellular phones or two-way radios. Do not use those devices during this threat since explosive devices can be triggered by radio frequencies.
- Determine whether to evacuate the threatened building and adjoining buildings or shelter in place. If the suspected bomb is in a corridor, modify evacuation routes to bypass the corridor.
- Use the intercom, personal notification by designated persons, or the PA system to evacuate the threatened rooms.

- If it is necessary to evacuate the entire school, use the fire alarm.
- Do not return to the school building until it has been inspected and determined safe by proper authorities.
- Avoid publicizing the threat any more than necessary.

**STAFF ACTIONS:**

- Evacuate students as quickly as possible, using primary or alternate routes.
- Upon arrival at the designated safe site, take attendance. Notify the principal/site administrator of any missing students.
- Do not return to the building until emergency response officials determine it is safe.

# EMERGENCY RESPONSE BOMB THREAT CHECKLIST

The following checklist can be obtained in PDF form from FEMA at: [http://emilms.fema.gov/is906/assets/ocso-bomb\\_threat\\_samepage-brochure.pdf](http://emilms.fema.gov/is906/assets/ocso-bomb_threat_samepage-brochure.pdf)  
Copies should be available at all stations where incoming calls are received. The checklist should be completed by the person taking the call.

## BOMB THREAT CALL PROCEDURES

Most bomb threats are received by phone. Bomb threats are serious until proven otherwise. Act quickly, but remain calm and obtain information with the checklist on the reverse of this card.

### If a bomb threat is received by phone:

1. Remain calm. Keep the caller on the line for as long as possible. DO NOT HANG UP, even if the caller does.
2. Listen carefully. Be polite and show interest.
3. Try to keep the caller talking to learn more information.
4. If possible, write a note to a colleague to call the authorities or, as soon as the caller hangs up, immediately notify them yourself.
5. If your phone has a display, copy the number and/or letters on the window display.
6. Complete the Bomb Threat Checklist (reverse side) immediately. Write down as much detail as you can remember. Try to get exact words.
7. Immediately upon termination of the call, do not hang up, but from a different phone, contact FPS immediately with information and await instructions.

### If a bomb threat is received by handwritten note:

- Call \_\_\_\_\_
- Handle note as minimally as possible.

### If a bomb threat is received by email:

- Call \_\_\_\_\_
- Do not delete the message.

### Signs of a suspicious package:

- No return address
- Excessive postage
- Stains
- Strange odor
- Strange sounds
- Unexpected delivery
- Poorly handwritten
- Misspelled words
- Incorrect titles
- Foreign postage
- Restrictive notes

### DO NOT:

- Use two-way radios or cellular phone; radio signals have the potential to detonate a bomb.
- Evacuate the building until police arrive and evaluate the threat.
- Activate the fire alarm.
- Touch or move a suspicious package.

## WHO TO CONTACT (select one)

- Follow your local guidelines
- Federal Protective Service (FPS) Police  
1-877-4-FPS-411 (1-877-437-7411)
- 911

## BOMB THREAT CHECKLIST

Date:  Time:

Time Caller Hung Up:  Phone Number Where Call Received:

### Ask Caller:

- Where is the bomb located? (Building, Floor, Room, etc.) \_\_\_\_\_
- When will it go off? \_\_\_\_\_
- What does it look like? \_\_\_\_\_
- What kind of bomb is it? \_\_\_\_\_
- What will make it explode? \_\_\_\_\_
- Did you place the bomb? Yes No \_\_\_\_\_
- Why? \_\_\_\_\_
- What is your name? \_\_\_\_\_

### Exact Words of Threat:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Information About Caller:

- Where is the caller located? (Background and level of noise) \_\_\_\_\_
- Estimated age: \_\_\_\_\_
- Is voice familiar? If so, who does it sound like? \_\_\_\_\_
- Other points: \_\_\_\_\_

- |  |  |                                       |
|--|--|---------------------------------------|
| <b>Caller's Voice</b>                    | <b>Background Sounds:</b>                  | <b>Threat Language:</b>               |
| <input type="checkbox"/> Accent          | <input type="checkbox"/> Animal Noises     | <input type="checkbox"/> Incoherent   |
| <input type="checkbox"/> Angry           | <input type="checkbox"/> House Noises      | <input type="checkbox"/> Message read |
| <input type="checkbox"/> Calm            | <input type="checkbox"/> Kitchen Noises    | <input type="checkbox"/> Taped        |
| <input type="checkbox"/> Clearing throat | <input type="checkbox"/> Street Noises     | <input type="checkbox"/> Irrational   |
| <input type="checkbox"/> Coughing        | <input type="checkbox"/> Booth             | <input type="checkbox"/> Profane      |
| <input type="checkbox"/> Cracking voice  | <input type="checkbox"/> PA system         | <input type="checkbox"/> Well-spoken  |
| <input type="checkbox"/> Crying          | <input type="checkbox"/> Conversation      |                                       |
| <input type="checkbox"/> Deep            | <input type="checkbox"/> Music             |                                       |
| <input type="checkbox"/> Deep breathing  | <input type="checkbox"/> Motor             |                                       |
| <input type="checkbox"/> Disguised       | <input type="checkbox"/> Clear             |                                       |
| <input type="checkbox"/> Distinct        | <input type="checkbox"/> Static            |                                       |
| <input type="checkbox"/> Excited         | <input type="checkbox"/> Office machinery  |                                       |
| <input type="checkbox"/> Female          | <input type="checkbox"/> Factory machinery |                                       |
| <input type="checkbox"/> Laughter        | <input type="checkbox"/> Local             |                                       |
| <input type="checkbox"/> Lisp            | <input type="checkbox"/> Long distance     |                                       |
| <input type="checkbox"/> Loud            |  |                                       |
| <input type="checkbox"/> Male            |  |                                       |
| <input type="checkbox"/> Nasal           |  |                                       |
| <input type="checkbox"/> Normal          |  |                                       |
| <input type="checkbox"/> Ragged          |  |                                       |
| <input type="checkbox"/> Rapid           |  |                                       |
| <input type="checkbox"/> Raspy           |  |                                       |
| <input type="checkbox"/> Slow            |  |                                       |
| <input type="checkbox"/> Slurred         |  |                                       |
| <input type="checkbox"/> Soft            |  |                                       |
| <input type="checkbox"/> Stutter         |  |                                       |

### Other Information:

\_\_\_\_\_  
\_\_\_\_\_



Homeland Security



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## **EMERGENCY RESPONSE    CHEMICAL ACCIDENT (offsite)**

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Chemical accidents the magnitude of a disaster could result from a transportation accident or an industrial spill, involving large quantities of toxic material.

### **SCHOOL DIRECTOR ACTIONS:**

- Determine whether to implement **SHELTER IN PLACE, EVACUATION** and/or student release.
- Post a notice on the school office door stating location of alternate school site.

### **STAFF ACTIONS:**

- If **SHELTER-IN-PLACE**, close all doors and windows, shut off ventilation, and monitor the radio. If necessary, use tape, rags, clothing or any other available material of seal air leaks.
- If you believe that gas is entering the building, protect everyone with a wet cloth or towel over the mouth and nose. Have everyone breathe in short, quick shallow breaths.
- If **EVACUATION** is implemented, direct all students to report to nearest designated building or assembly area.
- Upon arrival at safe site, take attendance to be sure all students have been evacuated and accounted for. Notify School Director of any missing students.

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## EMERGENCY RESPONSE      CHEMICAL ACCIDENT (onsite)

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This incident could be the result of spilled cleaning chemicals within the school building, in the school lab, a material a student brings to school, or a broken gas main. Any such accidents could endanger the students and staff. Hazardous material spills may occur inside a building, such as a spill in a chemistry lab.

### PERSON DISCOVERING SPILL:

- Alert others in immediate area to leave the area.
- Close windows and doors and restrict access to affected area.
- Notify School Director.

### SCHOOL DIRECTOR ACTIONS:

- Notify Fire Department and the Department of Public Health. Provide the following information:
  - School name and address, including nearest cross street(s)
  - Location of the spill and/or materials released; name of substance, if known
  - Characteristics of spill (color, smell, visible gases)
  - Injuries, if any
  - Your name and telephone number
- If necessary, proceed with school **EVACUATION** using primary or alternate routes, avoiding exposure to the chemical fumes.
- Post a notice on the school office door stating location of alternate school site.
- Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

### STAFF ACTIONS:

- If **EVACUATION** is implemented, direct all students to report to nearest designated building or assembly area. Take class roster and emergency backpack and student kits. Check that all students have left the building. Students are not to be left unattended at any time during evacuation process. Students are to remain quiet during evacuation.
- Upon arrival at evacuation site, take attendance. Notify School Director of any missing students.
- Upon arrival at evacuation site, take roll and report attendance to School Director immediately. Notify emergency response personnel of any missing students.
- Do not return to the building until emergency response personnel have determined it is safe.

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## **EMERGENCY RESPONSE      CIVIL DISTURBANCE/DEMONSTRATION**

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A civil disturbance is an unauthorized assemblage on the school grounds with the potential to:

- disrupt school activities;
- cause injury to staff and students; and/or
- damage property.

Precautionary measures must be taken to keep school personnel and students from undue exposure to danger. Efforts should be made to remain calm, to avoid provoking aggression, and to keep students in their classrooms.

### **Inside School**

#### **STAFF ACTIONS:**

- Report disruptive circumstances to School Director.
- Avoid arguing with participant(s).
- Have all students and employees leave the immediate area of disturbance.
- Lock doors. Account for all students and remain in classroom unless instructed otherwise by the principal or law enforcement.
- Stay away from windows and exterior doors.

#### **SCHOOL DIRECTOR ACTIONS:**

- If the students are engaging in civil disobedience, keep the students confined to one room/one area of the school
- Try to restore order.
- If unable to calm students and violent or uncontrolled behavior is probably, notify police of situation and request assistance.
- Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

### **Outside of School**

#### **SCHOOL DIRECTOR ACTIONS:**

- Call 911.
- Move any students who are outside into a school building and initiate **CODE YELLOW – SHELTER IN PLACE**
- Cancel all outside activities.
- Maintain an accurate record of events, conversations and actions.

#### **STAFF ACTIONS:**

- ❑ Close and lock classroom doors. Close all curtains and blinds. Keep students away from windows and take precautions to protect them from flying glass in the event windows are broken.
- ❑ Remain with students within locked classrooms until all clear is given, regardless of bells and the school schedule.

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**EMERGENCY RESPONSE**
**DEATH of a STUDENT**


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A student's death may be the result of a suicide, homicide, car accident, illness or other causes. It may have a profound effect on the school and may be one of the most difficult situations an administrator will face. A communications strategy developed in advance of such tragedy will help the administrator know what to say to the student's family and the school community.

**SCHOOL DIRECTOR ACTIONS:**

- Verify the death and obtain as much information about it as possible. Contact the Coroner's Office.
- Contact the student's family or visit the home to offer condolence and support. Obtain information about the funeral/memorial service. Respect their wishes.
- Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.
- Determine whether additional resources are needed and make appropriate requests.
- Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for students and staff who want or need counseling support and assistance.
- Develop a plan for notifying other students and sharing information about availability of support services. Do not use the public address system.
- Go to each of the student's classes and notify his/her classmates in person.
- Prepare a parent/guardian information letter and distribute it to students at the end of the day.
- Contact parents of those students who are affected by the crisis to determine appropriate support needed after leaving school. Offer assistance to parents of impacted students.
- Make arrangements with the family to remove the student's personal belongings from the school.
- Evaluate the response and determine what additional resources might be needed. Thank all those who assisted.

**STAFF ACTIONS:**

- Allow students who wish to meet in counseling office or other appropriate place to do so. Encourage students to report any other students who might need assistance. Arrange with facilitator/counselor to individually escort each student to the counseling support site.

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## **EMERGENCY RESPONSE      DEATH of a STAFF MEMBER**

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A reported death or serious illness among the school community may have a profound affect on students and staff alike.

### **SCHOOL DIRECTOR ACTIONS:**

- Verify the death and obtain as much information about it as possible. Contact the Coroner's Office.
- Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.
- Contact the decedent's family to offer condolence and support. Obtain information about the funeral/memorial service. Respect the wishes of the family.
- Determine whether additional resources are needed and make appropriate requests.
- Develop a plan for notifying students and sharing information about availability of support services. Do not use the public address system.
- Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for staff who want or need support and assistance.
- Facilitate classroom and small group discussions for students.
- Prepare a parent/guardian information letter and distribute it to students at the end of the day.
- Determine who from the decedent's family will secure the personal belongs. Make arrangements to remove the personal belongings from the school after school hours. Do not clean out personal belongings in the presence of students or staff.
- Thank all those who assisted.
- Continue to monitor staff and students for additional supportive needs.

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## EMERGENCY RESPONSE

## EXPLOSION

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Emergency response will depend on the type of explosion (smoke bomb, chemical lab incident, etc.) and proximity to the school. All students should be kept away from the explosion and under supervision.

### SCHOOL DIRECTOR:

- Determine whether site evacuation should be implemented. If so, sound fire alarm. This will automatically implement action to **EVACUATE** the building.
- Notify Fire Department (call 911). Provide school name, address, exact location within the building, your name and phone number and nature of the emergency.
- Secure area to prevent unauthorized access until the Fire Department arrives.
- Notify emergency response personnel of any missing students.
- Determine if Student Release should be implemented. If so, notify staff, students and parents.
- If damage requires the school to be closed, notify parents and staff of school status and alternate site for classroom instruction. Do not return to the school building until it has been inspected and determined safe by proper authorities.

### STAFF ACTIONS:

- Initiate **DROP, COVER AND HOLD ON**.
- If explosion occurred inside the school building, **EVACUATE** to outdoor assembly area. Keep students and staff at a safe distance from the building(s) and away from fire-fighting equipment.
- Upon arrival at assembly area, check attendance. Report status to site administrator immediately.
- Render first aid as necessary.
- Do not return to the building until the emergency response personnel determine it is safe to do so.
- If explosion occurred in the surrounding area, initiate **SHELTER IN PLACE**. Keep students at a safe distance from site of the explosion.

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**EMERGENCY RESPONSE**

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**FLOOD**

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Flooding could threaten the safety of students and staff whenever storm water or other sources of water threaten to inundate school grounds or buildings. Flooding may occur if a water pipe breaks or prolonged rainfall causes urban streams to rise. Flooding may also occur as a result of damage to water distribution systems such as failure of a dam or levee. If weather-related, an alert message will be broadcast over the weather radio station.

**SCHOOL DIRECTOR ACTIONS:**

- Determine if evacuation is required.
- Notify local police department of intent to **EVACUATE**, the location of the safe evacuation site and the route to be taken to that site.
- Communicate with families as appropriate
- Post a notice on the office door stating where the school has relocated
- Do not allow staff and students to return to the school until proper authorities have determined that it is safe to do so.

**STAFF ACTIONS:**

- If warranted, **EVACUATE** students using evacuation plan. Take the class roster, emergency backpack and student comfort kits. Take attendance before leaving the campus.
- Remain with students throughout the evacuation process.
- Upon arrival at the safe site, take attendance. Report any missing students to principal/site administrator and emergency response personnel.
- Do not return to school building until it has been inspected and determined safe by property authorities.



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**EMERGENCY RESPONSE**

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**KIDNAPPING**

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**SCHOOL DIRECTOR ACTIONS:**

- Verify information with the source of the abduction report.
- Contact law enforcement (call 911) for assistance.
- Provide a picture and complete information on the student: name, age, description, home address, emergency contact information, and custody information if known (Emergency Protective Order, Domestic Violence Order).
- Provide suspect information to the police, if known.
- Contact the parents/guardian of the student involved and establish a communication plan with them.
- Obtain the best possible witness information.
- Conduct a thorough search of the school/campus.
- Relay current information to police, parents and essential school staff.
- Designate a staff member as a key contact and personally answer the phone line (no voice mail) to receive and provide updated status as it becomes available.
- Advise the law enforcement dispatcher of the staff member key contact's name and number.
- Provide the key contact with access to school records.
- Ask key contact to be available at school by phone beyond the close of the school day, if needed, until dismissed by the principal or law enforcement.
- When the child is found, contact all appropriate parties as soon as possible.

**STAFF ACTIONS:**

- Notify School Director, providing essential details:
- Move students away from the area of abduction.

**EMERGENCY RESPONSE****MEDICAL EMERGENCY**

Medical accidents and emergencies can occur at any time and may involve a student or staff member. Some emergencies may only need first aid care, while others may require immediate medical attention. This is not a First Aid manual. When in doubt, dial 911. Medical emergencies involving any student or employee must be reported to the School Director.

**STAFF ACTIONS:**

- Assess the victim (ABC – Airway, Breathing, Circulation. Call 911, if appropriate. Provide:
  - School name, address including nearest cross street(s) and fastest way for ambulance to reach the building
  - Exact location within the building
  - Nature of the emergency and how it occurred
  - Approximate age of injured person
  - Caller's name and phone number
 Do not hang up until advised to do so by dispatcher.
- Monitor medical status of victim
- Do not give the individual anything to eat or drink.
- Notify School Director.
- Stay calm. Keep individual warm with a coat or blanket.

**Universal Precautions when Treating a Medical Emergency**

- Always use non-latex or nitrile gloves and, if necessary, mask and gown, to reduce the risk of transmission of body fluids.
- Wash hands thoroughly after providing care.

**SCHOOL DIRECTOR ACTIONS:**

- Assemble emergency care and contact information of victim
- Assign a staff member to remain with individual, even if he or she is transported to the hospital.
- Notify parents/guardian if the victim is a student. Describe type of illness or injury, medical care being administered, and location where student has been transported.
- Advise staff of situation (when appropriate). Follow-up with parents.

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**EMERGENCY RESPONSE**


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**MISSING STUDENT**

If a student is missing, a search of the school should be organized immediately. If at any point the child is found, inform everyone who was notified of the incident that the student is no longer missing.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- Conduct an immediate search of the school campus including PA announcements
- Call family to see if child was picked up or accounted for otherwise
- Call 911 and explain the situation. Gather information about student to provide to law enforcement authorities:
  - photo
  - home address
  - parent contact numbers
  - class schedule
  - special activities
  - bus route /walking information
- Notify parents/guardians if the student is not found promptly.
- If case involves abduction, begin gathering witness information for the police. Interview friends, last person to see student.
- Double-check circumstances:
  - Did someone pick up the student?
  - Could the student have walked home?
  - Is he or she at a medical appointment or another activity?
- Assist police with investigation. Provide a photo and complete information on the missing child: name. Assure that all parties who know the student or have participated in the search are available to speak with police when they arrive.
- Designate a staff member as a key contact and personally answer the phone line (no voice mail) to receive and provide updated status as it becomes available.
- Advise law enforcement dispatcher of the staff member key contact's name and number.
- If missing during bus transportation, provide law enforcement with child's bus stop location and nearest other bus stops.
- Have driver keep in communication with the transportation dispatcher. Have transportation dispatcher coordinate efforts and information with the law enforcement dispatcher
- Exchange phone numbers (household, cell phone, school key contact) with parents/guardian.
- When the child is found, contact all appropriate parties as soon as possible.
- Arrange for counseling of students, as needed.

**STAFF ACTIONS:**

- Confirm that student attended school that day.

- Provide description of the student, including height, weight, clothing worn that day, backpack, where last seen and when.
- Bring all students indoors. Immediately lock exterior access to the school and secure the campus. Do not let any individuals leave. Do not let unauthorized individuals come onsite.
- Take attendance in the classroom and report any other missing students to the office. Keep students in secure areas until notified to resume regular school activities.

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**EMERGENCY RESPONSE****MOTOR VEHICLE CRASH**

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A motor vehicle crash may result in a fuel or chemical spill on school property. If the crash results in a utility interruption, refer to the section on Utility Failure.

**SCHOOL DIRECTOR ACTIONS:**

- Notify police and fire department (call 911).
- Determine immediate response procedures, which may include **EVACUATION**, or **OFF-SITE EVACUATION**
- Arrange for first aid treatment
- Secure area to prevent unauthorized access until the public safety officials (police, sheriff, fire department) arrive.
- Ensure that students and staff remain at a safe distance from the crash.

**STAFF ACTIONS:**

- Notify School Director
- Move students away from immediate vicinity of the crash.
- Maintain control of the students a safe distance from the crash site.
- Care for the injured, if any.

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**EMERGENCY RESPONSE**

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**OPIOID OVERDOSE**

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In case of a suspected opioid overdose, the school nurse or other trained staff shall follow the protocols outlined in the CSSP, which are listed below:

**SCHOOL DIRECTOR ACTIONS:**

- Ensure emergency personnel is in route (call 911).
- Notify family members.
- After administration of naloxone, the school nurse or designee will follow the CDPH reporting protocols.
- Provide substance abuse prevention resources to the overdose victim and family, as appropriate

**STAFF ACTIONS :**

- Call 911
- Assess situation for personal safety (do not touch any medicines or powders that may be near victim)
- Move students away from immediate vicinity of the victim
- Notify School Director and School Nurse
- Administer rescue breathing (if necessary)
- Prepare and administer the Narcan or Naxolone
- Continue rescue breathing
- Give another dose of naloxone in 3 minutes if no response or minimal breathing or responsiveness
- Attach a label to the person's clothing indicating name of medicine, dosage and time administered
- Assess situation and help student or adult to be comfortable.
- Try to keep the person awake and breathing
- Lay the person on their side to prevent choking

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**EMERGENCY RESPONSE**

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**SEXUAL ASSAULT**

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Sexual assault can be verbal, visual, or anything that forces a person to join in unwanted sexual contact or attention. It can occur by a stranger in an isolated place, on a date, or in the home by someone who is a friend or acquaintance. Depending on the situation, the victim should not eat or drink, change clothes or shower while awaiting police.

**SCHOOL DIRECTOR ACTIONS:**

- Call 911
- Close off the area to everyone.
- Assign a counselor/staff member to remain with the victim.
- Review possible need for a **Lockdown** or **Secure Campus** until circumstances surrounding the incident are known.
- Notify victim's family.
- If child abuse is suspected, notify law enforcement. Notify student services staff members, as appropriate.
- The police will coordinate collection of evidence and questioning of the victim and suspects. Cooperate with any law enforcement agency conducting investigations.
- Discuss with counselors how to handle emotional effects of the incident on student and staff population. Plan appropriate school events for next day.
- Coordinate statements to media, families and community. Be aware of rumors that may start from this type of incident and address those rumors directly using facts.

**STAFF ACTIONS:**

- Isolate the victim from activity related to the incident.
- Avoid asking any questions except to obtain a description of the perpetrator.

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**EMERGENCY RESPONSE****Severe Weather**

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Severe weather can be accompanied by high winds, downed trees, and swollen creeks. An emergency response is required when this type of weather poses any risk to the staff and students. Assure that each student's method of returning home is safe and reliable.

**Severe Storm****SCHOOL DIRECTOR ACTIONS:**

- Monitor weather forecasts and weather-related communications to determine onset of storm conditions that may affect school operations..
- Determine whether school will be closed or remain open.
- Communicate with families and staff as necessary
- Post school status on school website.
- Take appropriate action to safeguard school property.
- Upon passage of the storm, return to normal routine.



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**EMERGENCY RESPONSE**
**SUICIDE ATTEMPT**


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Suicide, attempted suicide, and suicidal gestures have a significant detrimental effect, not only on the involved student, but also on others in the school community. There is no way to predict who will commit suicide, or when, but there are warning signs, including: increasing talk of death, talk about not being worth living and reckless behavior. School staff with reasonable cause to believe that a student is suicidal should begin the intervention process immediately. Parents must always be contacted. Attention should focus on the safety and best interests of the student, whose health, life or safety may be endangered

**SCHOOL DIRECTOR ACTIONS:**

- Call 911
- Calm student by talking and reassuring until police arrive. Try to have the student relinquish devices for and means of harming self. If individual is armed with any type of weapon, USE EXTREME CAUTION. Do not attempt to remove the weapon from the possession of the individual. Allow police to do so.
- Isolate the student away from other children
- Arrange for medical or counseling resources that may provide assistance.

**STAFF ACTIONS:**

- Inform the School Director of what was written, drawn, spoken and/or threatened.
- Move other students away from the immediate area, but remain with the troubled student until assistance arrives.
- Calmly talk to the student to determine whether he/she has any life-threatening devices (e.g., gun, knife, drugs, etc.) If possible, calmly remove them from the student and the immediate environment. Do NOT struggle if you meet resistance.
- Isolate the student away from other children

**Steps for Suicide Intervention**

1. Stabilize individual
2. Assess risk
3. Determine services needed
4. Inform
5. Follow-up

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**EMERGENCY RESPONSE**

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**UTILITY FAILURE**

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Failure of any of the utilities (electricity, gas, water) during school hours constitutes a condition that must be dealt with on a situational basis. Advance notice may be received from a utility company regarding loss of service. In many cases, such loss of service will be of short duration and require no special action other than notifying staff of the temporary interruption of service.

**SCHOOL DIRECTOR:**

- Notify utility company. Provide the following information:
  - Affected areas of the school site
  - Type of problem or outage
  - Expected duration of the outage, if known
- Determine length of time service will be interrupted.
- Determine desired action, which may include relocation of students and staff, notification of parents, etc.
- If disruption in service will severely hamper school operation, consider closing campus and notify students and staff by appropriate means.

### **III. Suspension & Expulsion Policies**

The school had adopted Pupil Suspension and Expulsion Policies in order to promote learning and protect the safety and well being of students and staff members at Journey School. When the policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction. The school administration and Council have reviewed the suspension and expulsion policies of Capistrano Unified School District and the California Education Code prior to preparing the procedures and the list of enumerated offenses for which a pupil may/must be suspended or expelled. The policy and procedures have also been prepared to provide due process to all students. The list of offenses and procedures provide adequate safety for students, staff, and visitors to the school and serves the best interests of the school's pupils and their parents/guardians.

Staff shall enforce disciplinary rules and procedures fairly and consistently among all students. The Policy and its Procedures clearly describe discipline expectations.

Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, use of alternative educational environments, suspension and expulsion. Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

A student identified as an individual with disabilities (or for whom the charter school has a basis of knowledge of a suspected disability) pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students, except when federal and state law mandates procedural safeguards and/or additional procedures, such as a manifestation determination.

#### **A. Grounds for Suspension and Expulsion of Students**

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at the School or at any other school or a School sponsored event, occurring at any time, including but not limited to: a) while on school grounds; b) while going to or coming from school; c) during the lunch period, whether on or off the school campus; d) during, going to, or coming from a school-sponsored activity.

#### **B. Suspension Offenses**

##### **1. Discretionary Suspension Offenses:**

Students may be suspended for any of the following acts when it is determined that the student:

- a) Willfully caused, attempted to cause, or threatened to cause physical injury to another person.
- b) Willfully used force of violence upon the person of another, except self-defense.
- c) Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.
- d) Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
- e) Committed or attempted to commit robbery or extortion.
- f) Willfully caused or attempted to cause damage to school property or private property.
- g) Stole or attempted to steal school property or private property.
- h) Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his/her own prescription products by a pupil in accordance with school policy.
- i) Committed an obscene act or engaged in habitual profanity or vulgarity.
- j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5.

~~k) Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, directors, other school officials, or other school personnel engaged in the performance of their duties. A pupil enrolled in kindergarten or any of grades 1 to 3, inclusive, shall not be suspended for any of the acts enumerated in this subdivision, and this subdivision shall not constitute grounds for a pupil enrolled in kindergarten or any of grades 1-8, inclusive, to be recommended for expulsion.~~

~~h)~~k) Knowingly received stolen school property or private property.

~~m)~~l) \_\_\_\_\_ Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.

~~n)~~m) \_\_\_\_\_ Committed or attempted to commit a sexual assault as defined in Penal code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.

~~o)~~n) \_\_\_\_\_ Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.

~~p)~~o) \_\_\_\_\_ Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.

- e)p)** \_\_\_\_\_ Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, “hazing” means a method of initiation or pre-initiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, “hazing” does not include athletic events or school-sanctioned events.
- f)q)** \_\_\_\_\_ Made terrorist threats against school officials and/or school property. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, or the personal property of the person threatened or his or her immediate family.
- s)r)** Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 8, inclusive.
- t)s)** Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 8, inclusive.
- u)t)** Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 8, inclusive.
- v)u)** \_\_\_\_\_ Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act, as defined in subdivisions (f) and (g) of Section 32261 of the Education Code, directed specifically toward a pupil or school personnel.
- w)v)** \_\_\_\_\_ A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1).

## 2. Non- Discretionary Suspension Offenses:

Students must be suspended and may be recommended for expulsion by school administration if the School Director found to have committed any of the following acts:

- (A) Causing serious physical injury to another person, except in self-defense.

- (B) Possession of any knife or other dangerous object of no reasonable use to the pupil.
- (C) Unlawful possession of any controlled substance except for first offense of possession of not more than one ounce of marijuana, or possession of over-the-counter medication for use by the student for medical purposes or medication prescribed for the student by a physician.
- (D) Robbery or extortion.
- (E) Assault or battery upon any school employee.

### C. Suspension Procedures

Suspensions shall be initiated in accordance with the procedures in the school's Suspension and Expulsion Policy as detailed below:

1. A conference with the student and administration, which will also include the parent and other school staff as possible. This step may be omitted in case of an emergency situation.
2. Written notice to Parents/Guardians will be given at the time of suspension. The notice will include the offense and the date of return of the student.
3. Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension.

If recommendation for Expulsion has been made, a conference will be held to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Director or designee upon either of the following determinations: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

### D. Expellable Offenses

1. **Discretionary Expellable Offenses:** Students may be expelled if found to have committed any of the offenses listed above under Sections B (1) and (2), ~~with the exception of subdivision (k) under B (1). A mandatory recommendation for expulsion is required from the School Director for all offenses listed in Section B(2). (See section above)~~
2. **Non -Discretionary Expellable Offenses:** Students **must be expelled** if found to have committed any of the following acts, regardless of the recommendation of the School Director:
  - (a) Possessing, selling, or otherwise furnishing a firearm. This subdivision does not apply to an act of possessing a firearm if the student had obtained prior written permission to possess the firearm from the Director or designee.
  - (b) Brandishing a knife at another person.
  - (c) Unlawfully selling a controlled substance.
  - (d) Committing or attempting to commit a sexual assault or sexual battery.

(e) Possession of an explosive.

## **E. Authority to Expel**

A student who has committed an expellable offense may be expelled by an Administrative Panel to be assigned by the School Director.- The Administrative Panel should consist of at least three members who are certificated and neither a teacher of the pupil, School Director, or a Council member of the School's governing board.

## **F. Expulsion Procedures**

Students recommended for expulsion are entitled to a hearing before an Administrative Panel to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the School Director or designee determines that the Pupil has committed an expellable offense.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil.

## **G. Students with Disabilities**

A pupil identified as an individual with disabilities or for whom the Charter School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for disciplinary action, including suspension and expulsion, and is accorded the same due process procedures applicable to regular education pupils except when federal and state law mandates additional or different procedures. The following is a summary of the current procedures to be followed when a student with a disability is considered for suspension or expulsion. These procedures will be updated if there is a change in the law.

1. Notification of SELPA
2. Services During Suspension/11<sup>th</sup> day services

Students suspended for more than ten (10) school days for behaviors deemed substantially similar, and within a given school year, shall continue to receive services so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP. These services may be provided in an interim alternative educational setting.

3. Procedural Safeguards/Manifestation Determination

Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability (including 11<sup>th</sup> day services) because of a violation of a code of student conduct, all relevant information will be reviewed to reach a determination whether the conduct was a manifestation of the child's disability. Depending on the outcome of this determination, additional steps are taken. Detailed information about how this procedure occurs and what additional steps are taken is found in the complete Suspension and Expulsion Policy.

4. Due Process Appeals

The parent of a child with a disability who disagrees with any decision regarding placement, or the manifestation determination, or the Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings.

When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent or the Charter school, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer or until the expiration of the forty-five (45) day time period provided for in an interim alternative educational setting, whichever occurs first, unless the parent and the Charter School agree otherwise.

#### 5. Special Circumstances

Charter School personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a child with a disability who violates a code of student conduct.

#### 6. Interim Alternative Educational Setting

The student's IEP team shall determine the student's interim alternative educational setting.

### **Procedures for Students Not Yet Eligible for Special Education Services**

A student who has not been identified as an individual with disabilities pursuant to IDEA and who has violated the district's disciplinary procedures may assert the procedural safeguards granted under this administrative regulation only if the Charter School had knowledge that the student was or may be disabled before the behavior occurred. Details about how to determine if the charter school had such knowledge can be found in the complete Suspension and Expulsion Policy.

#### **H. Record of Hearing**

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

#### **I. Presentation of Evidence**

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs.

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

If the Administrative Panel decides not to expel a pupil, the pupil shall immediately be returned to his/her educational program.

#### **J. Written Notice to Expel**



The Director or designee following a decision by the Administrative Panel to expel shall send written notice of the decision to expel, including the Administrative Panel's adopted findings of fact, to the student or parent/guardian.

The Director or designee shall send a copy of the written notice of the decision to expel to the sponsoring district and the County.

#### **K. Disciplinary Records**

The School shall maintain records of all student suspensions and expulsions at the School. Such records shall be made available to oversight agencies upon request.

#### **L. Expelled Pupils/Alternative Education**

Pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence.

#### **M. Rehabilitation Plans**

Students who are expelled from the School shall be given a rehabilitation plan upon expulsion as developed by the Administrative Panel, in consultation with School Director, at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to the School for readmission.

#### **N. Readmission**

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be in the sole discretion of the Council following a meeting with the School Director and the pupil and guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The School Director shall make a recommendation to the Council following the meeting regarding his or her determination. The pupil's readmission is also contingent upon the School's capacity at the time the student seeks readmission.

## IV. Bullying & Harassment Policy

Journey School is committed to providing a safe, positive, productive, and nurturing educational environment for all of its students, and encourages the promotion of positive interpersonal relations among members of the school community.

Harassment, intimidation, bullying, cyber-bullying, and/or hazing toward any member of the school community, whether by or against any student, staff, or other third parties, is strictly prohibited and will not be tolerated. Examples of such prohibited behavior include, but are not limited to, stalking, bullying/cyber bullying, intimidating, menacing, coercion, taunting, making threats, and hazing. This prohibition includes aggressive behavior; physical, verbal, and psychological abuse; and violence within a dating relationship. These types of behavior are forms of intimidation and harassment and are strictly prohibited, regardless of whether or not the target of the prohibited behavior are members of a legally protected group, such as, but not limited to, sex, sexual orientation, race, color, national origin, religion, gender, marital status, or disability.

The following definitions are intended to provide guidance in assessing whether a particular behavior is a prohibited behavior. They are not exhaustive in their scope and are not intended to replace the intuition of the individual. When in doubt as to whether or not a particular suspected behavior is a prohibited behavior, you are urged to rule on the side of caution and report your concerns to the appropriate authority, as provided for in this policy.

*Harassment* - any intentional behavior or course of conduct (whether written, verbal, graphic, or physical) directed at a specific person or group of persons that causes substantial physical and/or emotional distress or harm and is sufficiently severe, persistent, and/or pervasive that it creates an intimidating, threatening, and/or abusive educational environment for the other person(s) and serves no legitimate purpose.

*Bullying* – a course of abusive treatment (whether written, verbal, graphic, or physical) that typically involves the use of force or coercion to affect others, particularly when habitual and involving an imbalance of power. It may involve verbal, written or cyber harassment, physical assault or coercion and may be directed persistently towards particular victims.

*Cyber-bullying* – the use of information and communication technologies, such as, but not limited to, cell phone, email, instant messaging, social media websites, Twitter, etc., to support deliberate and hostile behavior by an individual or group, that (i) is intended to harm others or (ii) that an objectively reasonable person would expect to cause harm to others. Cyber-bullying includes the posting or other transmission of text, video, or images that are embarrassing, demeaning, or threatening in nature, regardless of whether the subject of such text, video, or images directed, consented to or otherwise acquiesced in the at issue posting or other transmission.

*Hazing* – the use of ritual and other activities involving harassment, bullying, cyber-bullying, intimidation, abuse or humiliation for the purpose of initiating a person or persons into a group, regardless of whether such person(s) consented to or otherwise acquiesced in the at issue behavior(s) and action(s).

*Intimidation* – a course of behavior that instills fear or a sense of inadequacy.

*Violence within a dating relationship* - any behavior by a student exhibited towards that student's dating partner that is an attempt to gain and/or maintain power and/or control over a dating partner through violence, threats of violence, and/or physical, verbal, psychological, and/or mental abuse.

*Sexting* - knowingly using a computer, or any other device capable of electronic data transmission or distribution, to transmit or distribute to another person any photograph or video which depicts nudity and/or text message that is sexually explicit and/or is harmful to minors. Knowingly possessing a photograph or video that was transmitted or distributed by another person as described above.

**Prohibited behaviors include all of the above.**

The school Administration and School Council will not tolerate any gestures, comments, threats, or actions which (i) cause, threaten to cause, or an objective and reasoned third-party would find was intended to cause, bodily harm or personal degradation, or (ii) creates, or an objective and reasoned third-party would determine was intended to create, an intimidating, threatening, or abusive environment for any student, staff member, member of the administration, parent or guardian, or other third-party.

This policy applies to all school-related activities and/or engagements, including, but not limited to classroom activities, recess or lunch activities, participation in clubs and activities, email messages, text messages, discussions, telephonic communications, or online forums related to school activities, field trips, open houses, school performances, school athletic competitions, and any other in-person school-related activities on school property. This policy also applies to those activities or engagements which occur off school property if the student or employee is at any school-sponsored, school-approved, or school-related activity or function, such as field trips or events where students are under the school's control, in a school vehicle, where an employee is engaged in school business, or where the prohibited behavior is facilitated through the use of any school property or resources.

Any student or student's Parent/Guardian/Caretaker, who believes that student, any other student, or other third-party, has been or is the recipient of any of the above-described prohibited behaviors should immediately report the situation to the School Administration. The student may also report concerns to teachers and other school staff who will be responsible for notifying the appropriate school administrator or Board official. Complaints about prohibited behavior against the school administrator(s) should be first brought to the attention of the School Administration, as mentioned above, for investigation and remedy as described below. If this is not sufficient, further complaints may be filed in accordance with the School's Uniform Complaint Policy.

Every student is encouraged, and every staff member is required, to report any situation that they believe to be prohibited behavior. Reports may be made to those identified above. If a student or other individual believes there has been prohibited behavior, s/he should report it and allow the administration to determine the appropriate course of action. Any teacher, school administrator, or school staff member who does not make a timely written report of an incident of prohibited behavior shall be subject to appropriate disciplinary action in accordance with the school's disciplinary process (found in the School Handbook).

All complaints about prohibited behavior shall be kept confidential to the greatest extent possible and will be promptly investigated. The school Executive Director or designee shall prepare a written report of the investigation upon completion. Such report shall include findings of fact, a determination of whether any prohibited behavior(s) were verified, and, when prohibited acts are verified, a

recommendation for intervention, including disciplinary action. Where appropriate, written witness statements shall be attached to the report. When the target of the prohibited behavior is a student, the school shall provide that student with a written copy of the rights, protections, and support services available to him/her. If there is any evidence that the student has experienced physical harm as a result of the prohibited behavior, the school shall promptly communicate that information to the appropriate personnel, including, but not limited to, emergency personnel and /or law enforcement.

If the investigation finds an instance of harassment, intimidation, bullying, dating violence, or any other prohibited behavior has occurred, it will result in prompt and appropriate remedial and/or disciplinary action in accordance with the school's disciplinary process. This may include expulsion for students, discharge for employees, exclusion for parents, guests, volunteers, and contractors, and removal from any official position and/or a request for a Board member(s) to resign. Individuals may also be referred to law enforcement officials. Remedial and/or disciplinary action for employees will follow the procedures outlined in the Employee Handbook. Remedial and/or disciplinary action for students will follow the procedures outlined in the School Handbook.

When appropriate, the target(s) of the prohibited behavior (and/or such target(s)' Parent/Guardian/Caretaker(s)) shall be notified of the findings of the investigation, and, when appropriate, that action has been taken. In providing such notification, care shall be taken to respect the statutory privacy rights of the accused perpetrator of such harassment, intimidation, bullying, and/or dating violence.

If after investigation the act(s) of prohibited behavior by a specific student is/are verified, the school Executive Director or designee shall notify in writing the Parent/Guardian/Caretaker of the perpetrator of that finding. If disciplinary consequences are imposed against such student, a description of such discipline shall be included in the notification.

Retaliation against any person who reports, is thought to have reported, files a complaint, or otherwise participates in an investigation or inquiry concerning allegations of harassment, intimidation, bullying, dating violence, or any other prohibited behavior will not be tolerated, independent of whether a complaint is substantiated. Such retaliation shall be considered a serious violation of school policy, and suspected retaliation should be reported in the same manner as prohibited behavior. Making intentionally false reports about prohibited behavior will not be tolerated. Retaliation and intentionally false reports may result in disciplinary action as indicated above.

This policy shall not be interpreted as infringing upon the First Amendment rights of students or parents (i.e., to prohibit a reasoned and civil exchange of opinions, or debate, that is conducted at appropriate times and places during the school day and is protected by State or Federal law and by the School's Free Speech Policy).

### **Formal Complaints**

Students and/or their Caretakers may file written reports regarding any suspected prohibited behavior by completing the forms found in the Uniform Complaint Policy and sending this to the school. Such reports should be reasonably specific including person(s) involved, number of times and places of the alleged conduct, the target of the suspected prohibited behavior(s), and the names of any potential student or staff witnesses.

Students and/or their Parent/Guardian/Caretakers may make informal complaints of conduct that they consider to be prohibited behavior(s) by verbal report to a teacher, school administrator, or other school personnel. Such informal complaints should be reasonably specific, including person(s)

involved, number of times and places of the alleged conduct, the target of suspected prohibited behavior, and the names of any potential student or staff witnesses. A school staff member or administrator who receives an informal complaint shall promptly document the complaint in writing by completing the appropriate forms. This written report shall be promptly forwarded by the school staff member and/or administrator to the Executive Director or designee for review, investigation, and appropriate action.

**Privacy/Confidentiality**

The School will respect the privacy of the complainant, the individual(s) against whom the complaint is filed, and the witnesses as much as possible, consistent with the school's legal obligations to investigate, to take appropriate action, and to conform to any discovery or disclosure obligations. All records generated under this policy and its related administrative guidelines shall be maintained as confidential to the extent permitted by law.

## V. School Wide Dress Code Prohibiting Gang Attire

*The Dress Code is established to support students' outward expression as well as establish courtesy and respect that all members of the school community have for one another. Our intention is to minimize distractions in an effort to ensure students remain focused on their education, rather than commercial, media and popular fashion. Please hold these thoughts in your consciousness and review these **guidelines** as you and your child are making wardrobe selections. Gang attire or attire determined by staff to be gang related is not permitted*

### **CLOTHING (TOPS/DRESSES/BOTTOMS) and HATS**

- Journey logo shirts and sweatshirts are recommended
- Alternatively, clothing with inspirational, positive, and non-violent images/phrases are permissible
- Clothing with media advertisements and logos are not encouraged and may be disallowed if they are determined to be a distraction for the student or classmates
- Middle School students (grades 6-8) may wear t-shirts and jackets with band/artists name and related imagery – if inspirational, positive, and non-violent
- Clothes must cover undergarments
- Clothes should be weather appropriate

### **SHOES**

- Footwear must be flat (No heels, wedges, wheels.)
- Sandals must have a heel strap
- Students must wear athletic or sneaker shoes for games classes

### **ACCESSORIES/MAKE-UP/JEWELRY**

- Stud earrings are allowed in all grades
- Light make-up and hair dye are allowed in grade 6 and up
- Jewelry should be kept at a minimum and is often a cause for student distraction

Decisions regarding the appropriateness of clothing and accessories are at the discretion of the Journey School Faculty and Administration. In case your child arrives at the school dressed inappropriately, we will give you a courtesy call so that you may bring replacement clothes or the staff may loan the student appropriate attire to wear for the day. If persistent violations of the dress code occur, the Faculty and or the Administrator may take further action including, but not limited to, meeting with the parent(s) to discuss and review Dress Code Policy. We thank you for your support in protecting a safe, wholesome, and age-appropriate educational setting for our children.

## **VI. Teacher Notification of Dangerous Students**

The School Director or designee, in accordance with law, shall ensure teachers and all applicable staff shall be notified of student who may pose a danger in the classroom. All information regarding suspension and expulsion is CONFIDENTIAL and shall not be shared with any unauthorized parties.

Journey School shall define a potentially dangerous student as a pupil who has: (1) during the previous three school years, engaged in an act willfully harmed, attempted to harm or threatened to harm another student or staff member for which he/she was suspended OR (2) committed a crime reported to Journey School by a family member, local law enforcement, court services, probation department or social services.

In the event Journey School is provided information from a previous school or agency or becomes aware of such behavior during the course of the student's enrollment at Journey School, this information shall be used to develop awareness, assign appropriate discipline consequences, assist in allocating resources, and may be a factor in determining which services are provided to the student or recommence to the parent/guardian.

Teachers are notified of dangerous student via the following process:

- Any student meeting the above criteria will be flagged in our student information system
- Upon receipt of incoming cumulative files, data is reviewed by administrative staff and flagged for dangerous students
- If a student is flagged, a notice will be distributed to the students' teachers and applicable staff.
- Time will be made to review and questions or concerns that staff may have and to establish support strategies as appropriate.

## **VII. Procedures for Safe Ingress and Egress of Pupils, Parents and Staff to and From School**

The Journey School Parent Handbook defines the procedures for safe ingress and egress of students as well as details regarding the nature and hours of campus supervision. Parents are informed of procedures for student drop-off and pick-up as well. In addition, a weekly newsletter provides frequent reminders about traffic and campus safety.

At the beginning of each school year, administration trains staff on safety procedures including safe ingress and egress of students and related campus supervision efforts before and after school hours.

Staff members are vigilant about visitors on campus and during school hours, all school guests are asked to sign in at the office and display a visitor's badge for the purposes of identification. If a person's presence on campus is questioned as administrator is contacted immediately.



## VIII. Rules and Procedures on School Discipline

Journey School staff is committed to creating a safe and nurturing environment for every child. We are equally committed to maintaining a respectful environment conducive to learning.

Through this Student Behavior Policy and within our day-to-day practice, our intention is to discourage misbehavior, guide children towards positive choice making and develop positive contributors within our school community. Our approach emphasizes *compassion, consistency, and responsibility*.

To that end, Journey School students are expected to adhere to the values, which form our behavior motto - *RESPECT* (**R**espect, **E**mpathy, **S**ervice, **P**articipation, **E**ffort, **C**ourage, **T**rustworthiness) and the following behavior guidelines:

### Behavior Guidelines

1. **Student will support a good learning environment.** Children are expected to do their best and cooperate with teachers and classmates. This includes, but is not limited to, quietly focusing their attention on the teacher when asked to do so, completing class assignments, observing class starting and ending times, completing classroom chores, and lining up promptly and quietly when requested to do so. Student defiance and disruption to the learning environment will not be permitted.
2. **Students will treat all adults and children with respect.** Respectful, courteous language is expected towards teachers, children and parents. Inappropriate behavior such as rudeness, teasing, mimicking, unkind or inappropriate words, swearing and lying are not permitted. Students are expected to comply whenever an adult or peer asks for the inappropriate behavior to stop.
3. **Students will treat all personal and school property with respect.** Lost, stolen, defaced or destroyed property will be repaired or replaced by the parents of those responsible in accordance with applicable law.
4. **Students will obey all classroom and playground rules.** Teachers will help their students understand and integrate the school-wide behavior policy into their daily activities. Additionally, individual teachers may have unique expectations, which they will communicate to their classes.
5. **Students will contribute to supporting a safe, positive, productive and nurturing educational environment.** Harassment, intimidation, bullying, cyber-bullying, and/or hazing toward any member of the school community, whether by or against any student, staff, or other third parties, is strictly prohibited and will not be tolerated. Examples of such prohibited behavior include, but are not limited to, stalking, bullying/cyber bullying, intimidating, menacing, coercion, taunting, making threats, and hazing. This prohibition includes aggressive behavior; physical, verbal, and psychological abuse. *A full copy of the Journey School Bullying and*

*Harassment Policy can be found on the school website and on page 29 of the School Handbook.*

6. **An expectation for “Gentle Hands” is in place.** Rough housing, fighting, shoving, spitting, pushing, hitting, kicking, or biting is cause for immediate intervention.
7. **An expectation that “All are Welcome” is in place.** Conversations, activities and games that exclude peers from participating are not permitted.

### **Consequences for Misbehavior**

Classroom management techniques, positive behavior intervention strategies (PBIS) and Tier I disciplinary interventions will be employed by school staff as a primary measure to correct behavior. Tier I disciplinary interventions may include but are not limited to advising and counseling students, conferring with parents/guardians, assigning tasks to students for completion during recess/lunch recess, issuing “Green Cards” for a short break to reflect on behavior (either a “pause” within the class or a “moment” in another class), etc. Staff shall enforce disciplinary rules and procedures fairly and consistently among all students.

In the event that primary efforts are not sufficient in our attempts to correct disruptive/disrespectful behavior OR a pattern of misbehavior emerges OR the severity of an incident/infraction is significant, one or more of the following actions will be taken as determined appropriate by the school’s educational team (administration and/or teachers involved).

1. **“Green Card” issued for a student restart:** An office referral that involves parent/guardian contact. In this scenario, a student is spoken to by administrative staff and sent back into class when they are ready to contribute to a respectful learning environment.
2. **Incident Report:** A document describing the specifics of an incident or infraction written by those school staff directly involved. This report is placed within the student’s cumulative school record *and* a copy will be sent home to the student’s parents for review. The class teacher and/or administration will notify the student’s parents about the incident or infraction. The class teacher, administrator and possibly the student, will determine the corrective course of action.
3. **Student Support Plan/Behavior Contract:** Developed when a child habitually fails to follow the school or classroom behavior guidelines or a pattern of behavior develops that undermines a healthy learning environment, endangers others, oneself or property. The plan will be drafted at a parent conference with administration and teacher. The plan will describe the behavior(s), the antecedent/setting event for those behaviors, the intervention/support methods employed by Journey School moving forward, and an articulation of the specific escalation of discipline should the behavior continue, which may include removal from Journey School.
4. **Suspension:** A mandatory leave may be assigned to a student in response to an isolated incident/infraction or a pattern of misconduct. The student shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension. The period of suspension for an infraction will be determined by administration and will not exceed

five (5) consecutive school days. A suspension notice will be filed within the student's cumulative school record *and* a copy will be sent home to the student's parents. *A full copy of the Journey School Expulsion/Suspension/Exclusion and Due Process Policy can be found on the school website and on page 32 of the School Handbook.*

- 5. Expulsion:** Should the interventions detailed above fail to correct a student's pattern of behavior or a student commits an expellable offense; expulsion from Journey School may be recommended at the discretion of administration. Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days and the student will be considered suspended from Journey school until that hearing takes place. A recommendation for expulsion notice will be filed within the student's cumulative school record *and* a copy will be sent home to the student's parents. *A full copy of the Journey School Expulsion/Suspension/Exclusion and Due Process Policy can be found on the school website and on page 32 of the School Handbook.*

## Disciplinary Escalation

Below is a summary of the disciplinary measures that Journey School *may* employ in a given school year *prior* to an administrative recommendation for expulsion from Journey School\*:

1. Parents/guardians are contacted to inform them of a pattern of unacceptable student conduct ("green cards and incident reports"). Solutions and strategies are implemented in the school and at home as a primary measure of support and correction.
2. If the behaviors do not improve and the pattern of unacceptable student conduct continues, the behavioral support team will convene with parents/guardians to develop a formal behavior support plan and contract.
3. If this plan and contract does not shift student conduct and student continues to violate school policy, the following disciplinary measures will may be utilized.
  1. First suspension and parent conference with administration.
  2. Second suspension and parent conference with behavioral support team and administration.
  3. Third suspension and possible recommendation for expulsion\*.

\*The escalation/steps detailed above is intended to serve as a guideline for the typical steps of a disciplinary pathway and related supports. These steps are not intended to limit administration's discretion to suspend or expel a child based on the circumstances of an isolated incident. Please see school handbook for safeguards and due process in place for students with disabilities

## Dangerous, Violent or Unlawful Activity

Journey School has adopted the following procedures to assess and respond to reports of dangerous, violent and/or unlawful activity conducted or threatened to be conducted at school. Below is a summary of this procedure:

1. If there is an immediate threat to life and/or property, school administration will call 911.

2. If it is determined that there is not an immediate threat to life and/or property, administration will gather information and facts to guide next steps which may include school discipline procedures detailed above.
3. In gathering information and facts, administration may determine that activities were unlawful or potentially unlawful and will engage law enforcement as appropriate. One of the following agencies established by the Orange County Sheriff's Department will be contacted depending on the nature of the activity/activities being investigated:
  - a.) School Resource Officer (SRO) assigned to Journey School

The School Resource Officer (SRO) Program places uniformed officers within educational institutions to meet a variety of needs. Although the SRO's are predominantly assigned to Middle or High Schools that are located in the Sheriff's jurisdiction of Orange County, they also respond to elementary and institutions within their areas.
  - b.) Orange County School Mobile Assessment and Resource Team (SMART)

The School Mobile Assessment and Resource Team is utilized in school situations and incidents related to violence, threats, possession and/or use of weapons, unstable behaviors, and suicidal actions or tendencies.

## IX. Dangerous Weapons

Weapons are prohibited on school grounds. Students who bring weapons will be disciplined according to the school suspension and expulsion policy. Additionally, California Penal Code § 626.10 PC makes it a crime to bring dangerous weapons onto school grounds, including K-12 schools and any private or public university or college. The offense can be charged as a misdemeanor or a felony.

The language of the statute reads:

*626.10. (a) (1) Any person, except a duly appointed peace officer as defined in Chapter 4.5 (commencing with Section 830) of Title 3 of Part 2, a full-time paid peace officer of another state or the federal government who is carrying out official duties while in this state, a person summoned by any officer to assist in making arrests or preserving the peace while the person is actually engaged in assisting any officer, or a member of the military forces of this state or the United States who is engaged in the performance of his or her duties, who brings or possesses any dirk, dagger, ice pick, knife having a blade longer than 2½ inches, folding knife with a blade that locks into place, razor with an unguarded blade, taser, or stun gun, as defined in subdivision (a) of [Penal Code] 244.5, any instrument that expels a metallic projectile, such as a BB or a pellet, through the force of air pressure, CO2 pressure, or spring action, or any spot marker gun, upon the grounds of, or within, any public or private school providing instruction in kindergarten or any of grades 1 to 12, inclusive, is guilty of a public offense, punishable by imprisonment in a county jail not exceeding one year, or by imprisonment pursuant to subdivision (h) of Section 1170.*

Due to the nature of Journey School's programming, it should be noted that Games/PE classes practice archery and javelin under close supervision of a staff member and with safety precautions in place. Additionally, there are tools and knives that are used in farming, woodwork and cooking classes. These tools and items are stored securely and are used solely for instructional purposes. Staff/students are exempt from Penal Code 625.10 so long as the tools and items described above are used in accordance with law and in a manner consistent with instructional purposes.

## X. Prevention of Gun Violence

To further student and staff safety, Journey School ~~proposes~~ strives to help prevent gun violence at school campuses by distributing materials to the community with an aim to educate and raise awareness about how to securely store guns—and why it matters. Distribution and education efforts would occur on an annual basis.

## Prepared for

Journey School  
27102 Foxborough  
Aliso Viejo, CA 92656

## Summary

At the direction of Journey School administrators, Strategic Kids staff are available to continue supporting the school by providing Summer Camp programming during the summer of 2024.

Strategic Kids staff will supervise the students and lead activities during 6 weeks of summer. We can provide camp for up to 120 students per week at \$150 per student per week. All staff will continue to follow school COVID protocols, be Live Scanned and fulfill the requirements set by Journey School. We will run this camp in following Waldorf principals to the best of our ability and include nature walks, arts and crafts, and work books chosen by Mr. Keller. We plan to run the week of 7/15-19, 7/22- 7/26, 7/29-8/2, 8/5-8/9, 8/12-8/16, 8/19-8/23

Below you will find the estimated cost if all 6 weeks have 80 students, 100 students, or 120 students. Each additional student will be at \$133.33 per week per student. Each week may vary and so the final cost may vary depending on enrollment.

# of Students	Weekly Camp Rate Per Student	Estimated Cost for 6 Weeks
80 Students	\$150	\$72,000
100 students	\$150	\$90,000
120 students	\$150	\$108,000

## Benefits of Strategic Kids

As an existing partner of Journey and many other school districts in Southern California, Strategic Kids is ready to provide all the services in this quote. We will provide:

- Experienced and Live Scanned Strategic Kids Instructors with lots of experience working with children.
- Instructors ready to provide our own high-quality programs.
- Instructors are CPR and First Aid certified and are covered by Strategic Kids Workers Compensation and Unemployment Insurance.

## Personnel questions or concerns:

Adam Brody - Strategic Kids President

We look forward to continuing services with Journey School in the capacities that best fits the needs of the school.



Sincerely,  
Strategic Kids