

Redwood Coast Montessori Board of Directors
Remote Meeting

Zoom (<https://us05web.zoom.us/j/83757130105?pwd=VXdKeVFrOW50U2lYUVZETzk1dDk1Zz09>)

REGULAR MEETING

May 11, 2022 6:30 p.m.

AGENDA

A. CALL TO ORDER OF OPEN SESSION

B. OPEN SESSION: 6:30 P.M. LOCATION – REMOTE MEETING

C. PUBLIC COMMENT

The public is invited to make announcements or comment on information to the Board that is relevant to the scope of authority of Redwood Coast Montessori. The Board may uniformly impose a time limit of 3 minutes to individual presentations to assure every subject is heard. By public law, the Board cannot take action on items not on the agenda.

D. GENERAL FUNCTION-CONSENT ITEMS - Approval w/ Single Motion:
Items listed under the Consent Agenda are considered to be routine and are acted on by the Board in one motion. There is no discussion of these items before the Board vote unless a member of the Board, staff, or public requests specific items be discussed and/or removed from the Consent Agenda. It is understood that the Administration recommends approval on all Consent Items.

- | | |
|--|--------|
| 1. Approval of Draft Minutes of April 20, 2022 Regular Meeting | Action |
|--|--------|

E. BUSINESS AND FINANCE

- | | |
|--|--------|
| 1. Approval of CalSHAPE resolution for the purpose of replacing furnace filters, adjustments and maintenance to HVAC units, and installation of carbon dioxide monitors. | Action |
| 2. Approval of lighting retrofit for Arcata campus (not to include HVAC upgrades at this time). | Action |

F. SCHOOL FUNCTIONS

- | | |
|---|-------------|
| 1. Discussion and possible modification of RCM masking policy | Action |
| 2. RCM Equity and Diversity Report | Information |
| 3. LCAP Update | Information |
| 4. WASC Visit Update | Information |
| 5. June meeting dates | Action |

G. STAFF and DIRECTORS REPORTS

- | | |
|---------------------|-------------|
| 1. Staff Reports | Information |
| 2. Director Reports | Information |

H. FUTURE AGENDA ITEMS

- | | |
|--------------------------------|--------|
| I. ADJOURNMENT OF OPEN SESSION | Action |
|--------------------------------|--------|

NOTICE: Any writing, not exempt from public disclosure under Government Code Section 6253.5, 6254, 6254.3, 6254. 7, 6254.15, 6254.16, OR 6254.22, which is distributed to all or a majority of the members of the governing board by any person in connection with a matter subject to discussion or consideration at an open meeting of the board is available for public inspection at the Redwood Coast Montessori School 1611 Peninsula Drive, Arcata, CA 95521. In compliance with Government Code section 54954.2(a) Redwood Coast Montessori will, on request make agendas available in appropriate alternative formats to persons with a disability, as

required by Section 202 of the Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Individuals who need this agenda in an alternative format or who need a disability-related modification or accommodation in order to participate in the meeting should contact Redwood Coast Montessori at 707-832-4194.

Redwood Coast Montessori Board of Directors

Remote Meeting

Zoom (<https://us05web.zoom.us/j/83757130105?pwd=VXdKeVFrOW50U2lYUVZETzk1dDk1Zz09>)

REGULAR MEETING

April 20, 2022 6:30 p.m.

MINUTES

A. CALL TO ORDER OF OPEN SESSION by Terry Weeks at 6:33 p.m.

a. Present: Terry Weeks, Kim Bonine, Candy Stockton, Troy Nicolini, Libbi Miller

B. PUBLIC COMMENT Statement read at 6:34 p.m., no public comments

D. GENERAL FUNCTION – [Action Item]

1. Approval of general consent items: M/S by Stockton/Nicolini to approve the General Function-Consent Items. Board: ayes 4, noes 0. Motion carried.

E. BUSINESS AND FINANCE

1. No Action Taken

F. SCHOOL FUNCTIONS

1. RCM masking policy: The RCM Board, school staff, and community members discussed the possibility of modifying the current mask policy. M/S by Miller/Nicolini for RCM to maintain the current masking policy of optional outdoor masking and mandatory indoor masking until the end of the school year with the understanding that if there is a consistent downward trend in positive cases in Humboldt County over the next four weeks, the Board will revisit the issue at the May regular board meeting. The Board also approved an exception to the indoor masking requirement for First 5 Playgroup children while inside the Main Hall multi-purpose room during Playgroup sessions. Board: ayes 5, noes 0. Motion carried.
2. RCM Equity and Diversity Report: Michelle reported on recent meetings by the Equity and Diversity Committee and the work being done to modify the draft anti-racism policy.
3. 2022-23 School Calendar: M/S by Stockton/Miller to approve the 2022-23 School Calendar as submitted. Board: ayes 5, noes 0. Motion carried.
4. WASC Visit Update: Bryan reported that the WASC visit was completed, however, there is ongoing work to finalize all the required documents needed for submission. There will be a more extensive report to the Board at the May regular meeting.

G. STAFF AND DIRECTOR REPORTS

1. Staff: Michelle reported about recent and upcoming events at the Manila campus including the Spring Sing and the upcoming talent show. Bryan about recent and upcoming events including the start of tennis practice, the nearly completed lunch review, and the upcoming school dance in May.
2. Directors: Troy reported that he is continuing to work on his goal of developing a soccer field at the Manila campus. Kim reported on the possible option of seeking a donation of artificial turf from CalPoly Humboldt for a soccer field.

ADJOURNMENT OF OPEN SESSION

- a. M/S by Nicolini/Miller to adjourn meeting. Board ayes 4, noes 0. Motion carried at 7:47 p.m.

**California Schools Healthy Air, Plumbing, and Efficiency Program
Governing Body Resolution**

RESOLUTION NO. _____

Resolution of

Name of Local Educational Agency (the LEA)

WHEREAS, the California Energy Commission's California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program provides grants to local educational agencies (LEA), that includes school districts, charter schools, and regional occupational programs, to fund the assessment, maintenance, and repair of ventilation systems, installation of carbon dioxide monitors, and replacement of noncompliant plumbing fixtures and appliances;

NOW THEREFORE, BE IT RESOLVED, that _____
Governing Body (the Governing Body)

authorizes the LEA to apply for a grant from the California Energy Commission to implement a CalSHAPE Program project.

BE IT ALSO RESOLVED, that in compliance with the California Environmental Quality Act (CEQA), the Governing Body finds that the activity funded by the grant is (Please select one)

☐ not a project because _____

OR

☐ a project that is exempt under _____ because

OR

☐ a project and _____
_____ document was prepared.

BE IT ALSO RESOLVED, that if recommended for funding by the California Energy Commission, the Governing Body authorizes the LEA to accept a grant up to \$_____ and accept all grant agreement terms and conditions.
Grant Amount Requested

_____, and _____,
Name of Designated LEA Official or Staff *Name of Designated LEA Official or Staff*

Passed, Approved and Adopted this _____ day of _____, _____.

Month *Year*



RECIPIENT Redwood Coast Montessori	AGREEMENT NUMBER 21R2VA1167
ADDRESS Bryan Little PO Box 6103 Eureka, CA 95502	AGREEMENT TERM Ends 24 months after Effective Date The effective date of this Agreement is either the start date or the approval signature date by the California Energy Commission representative below, whichever is later. The California Energy Commission shall be the last party to sign. No work is authorized, nor shall any work begin, until on or after the effective date.

PROJECT DESCRIPTION

The parties agree to comply with the terms and conditions of the following Exhibits which are by this reference made a part of the agreement.

- Exhibit A** – Scope of Work
- Exhibit B** – Budget
- Exhibit C** – Agreement Contacts
- Exhibit D** – Terms and Conditions

	EIMBURSABLE AMOUNT \$25,641.60
	Total of REIMBURSABLE AMOUNT \$25,641.60

The undersigned parties have read the attachments to this agreement and will comply with the standards and requirements contained therein.

CALIFORNIA ENERGY COMMISSION		RECIPIENT	
AUTHORIZED SIGNATURE	DATE	AUTHORIZED SIGNATURE	DATE
NAME Adrienne Winuk		NAME	
TITLE Contracts, Grants, and Loans Office Manager		TITLE	
CALIFORNIA ENERGY COMMISSION ADDRESS 1516 9th Street, MS 18, Sacramento, CA 95814			

EXHIBIT A
Scope of Work

Redwood Coast Montessori 12626790137653

Total Number of Sites 1

Site Name

Redwood Coast Montessori

CDS Code

12626790137653

Redwood Coast Montessori
Category

Unit Count

Assessment & Maintenance

7

Filter

7

Monitor

8

EXHIBIT B
Budget

Redwood Coast Montessori
12626790137653

Total Requested Amount
\$25,641.60

Site Name
Redwood Coast Montessori

Requested Amount
\$25,641.60

Redwood Coast Montessori
Category

Assessment & Maintenance
Filter
Monitor
Contingency

Requested Amount
\$16,365.00
\$443.00
\$4,560.00
\$4,273.60

Total Grant Award

Initial Payment
Final Payment

\$25,641.60
\$12,820.80
\$12,820.80

EXHIBIT C

Contacts

CalSHAPE Program Staff

California Energy Commission
715 P Street
Sacramento, CA 95814
E-mail: CalSHAPE@energy.ca.gov

Confidential Deliverables/Products

Adrienne Winuk, Manager
California Energy Commission
Contracts, Grants and Loans Office
715 P Street, MS - 18
Sacramento, CA 95814
E-mail: Adrienne.Winuk@energy.ca.gov

Invoices, Progress Reports and Non-Confidential Deliverables to

Mary Hung
California Energy Commission
Accounting Office
714 P Street MS - 2
Sacramento, CA 95813
E-mail: Mary.Hung@energy.ca.gov

EXHIBIT C

Contacts

LEA Contact (Primary)

Name

Address

City, State, Zip

E-mail

LEA Contact (Alternate)

Name

Address

City, State, Zip

E-mail

LEA Contact (Alternate)

Name

Address

City, State, Zip

E-mail

EXHIBIT D

**CALIFORNIA SCHOOLS HEALTHY AIR, PLUMBING, AND EFFICIENCY
(CALSHAPE) STANDARD GRANT TERMS AND CONDITIONS**

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1. **Introduction**

This grant agreement (Agreement) between the California Energy Commission (Energy Commission, or Commission) and the Recipient is funded by the School Energy Efficiency Stimulus Program, established by Assembly Bill 841 (Ting, Chapter 372, Statutes of 2020), which in part provides grants to assess, maintain, adjust, repair, or upgrade heating, ventilation, and air conditioning systems. This grant program is referred to as the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Ventilation Program.

This Agreement includes: (1) the Agreement signature page (**form CEC-146**); (2) the scope of work (**Exhibit A**); (3) the budget (**Exhibit B**); (4) a contacts list (**Exhibit C**); (5) these terms and conditions, which are standard requirements for CalSHAPE ventilation program grant awards (**Exhibit D**); (6) any special terms and conditions that the Energy Commission may impose to address the unique circumstances of the funded project, which take precedence in the event of a conflict with any provision of these terms and conditions (**Exhibit E**); (7) all attachments; and (8) all documents incorporated by reference.

All work and expenditure of Commission-reimbursed funds must occur prior to the Agreement term end date specified on the CEC-146 form.

2. **Documents Incorporated by Reference**

The documents below are incorporated by reference into this Agreement. These terms and conditions will govern in the event of a conflict with the documents below, with the exception of the documents in subsections (f) and (g) below. Where this Agreement or California laws and regulations are silent or do not apply, the Energy Commission will use the federal cost principles and acquisition regulations listed below as guidance in determining whether reimbursement of claimed costs is allowable. Documents incorporated by reference include:

Funding Documents

- a. The notice of funding availability for the project supported by this Agreement
- b. The Recipient's application submitted in response to the notice of funding availability

Program Guidelines

- c. CalSHAPE Ventilation Program Commission Guidelines, available at <https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program>

Federal Cost Principles (*applicable to state and local governments, Indian tribes, institutions of higher education, and nonprofit organizations*)

- d. 2 Code of Federal Regulations (CFR) Part 200, Subpart E (Sections 200.400 et seq.)

Federal Acquisition Regulations (*applicable to commercial organizations*)

- e. 48 CFR, Ch.1, Subchapter E, Part 31, Subpart 31.2: Contracts with Commercial Organizations (supplemented by 48 CFR, Ch. 9, Subchapter E, Part 931, Subpart 931.2 for Department of Energy grants)

Nondiscrimination

- f. 2 California Code of Regulations, Section 11099 et seq.: Contractor Nondiscrimination and Compliance

General Laws

- g. Any federal, state, or local laws or regulations applicable to the project that are not expressly listed in this Agreement

3. **Standard of Performance**

In performing work under the Agreement, the Recipient, its subcontractors, and their employees are responsible for exercising the degree of skill and care required by customarily accepted good professional practices and procedures for the type of work performed.

4. **Due Diligence**

- a. The Recipient must take timely actions that, taken collectively, move this project to completion.
- b. Energy Commission staff will periodically evaluate the project schedule for completion of Scope of Work tasks. This evaluation may include but not be limited to random checks of project progress at periodic intervals set by the Energy Commission. Recipients subject to a project check must complete a progress report using a template prepared by the Energy Commission to provide information on the project status and expected completion date.
- c. If Energy Commission staff determines that: (1) the Recipient is not diligently completing the tasks in the Scope of Work; or (2) the time remaining in this Agreement is insufficient to complete all project tasks by the Agreement end date, Energy Commission staff may recommend that this Agreement be terminated, and the Commission may terminate this Agreement without prejudice to any of its other remedies.

5. **Products**

- a. **“Products”** are any tangible item specified for delivery to the Energy Commission in the Scope of Work, such as reports and summaries. The Recipient will submit all products identified in the Scope of Work to Energy Commission staff, in the manner and form specified in the Scope of Work.

If Energy Commission staff determines that a product is substandard given its description and intended use as described in this Agreement, Energy Commission staff, without prejudice to any of the Commission’s other remedies, may refuse to authorize payment for the product and any subsequent products that rely on or are based upon the product under this Agreement.

- b. **Failure to Submit Products**

Failure to submit a product required in the Scope of Work may be considered material noncompliance with the Agreement terms. Without prejudice to any other remedies, noncompliance may result in actions such as the withholding of future payments or awards, or the suspension or termination of the Agreement.

- c. **Legal Statements on Products**

All documents that result from work funded by this Agreement and are released to the public must include the following statement to ensure no Commission endorsement of documents:

LEGAL NOTICE

This document was prepared as a result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees, or the State of California. Neither the Commission, the State of California, nor the Commission's employees, contractors, or subcontractors makes any warranty, express or implied, or assumes any legal liability for the information in this document; nor does any party represent that the use of this information will not infringe upon privately owned rights. This document has not been approved or disapproved by the Commission, nor has the Commission passed upon the accuracy of the information in this document.

6. Amendments

a. Procedure for Requesting Extensions

The Recipient must submit a written request to the CalSHAPE Program for a one-time only extension to the Agreement, not to exceed six-months nor the final program reporting deadline date of June 1, 2026. The request must include:

- A brief summary of the proposed extension; and
- A brief summary of the reason(s) for the extension

b. Approval of Changes

No amendment or variation of this Agreement shall be valid unless made in writing and signed by both of the parties except for the Commission's unilateral termination rights in Section 16 of these terms. No oral understanding or agreement is binding on any of the parties.

7. Contracting and Procurement Procedures

This section provides general requirements for agreements entered into between the Recipient and subcontractors for the performance of this Agreement.

a. Contractor's Obligations to Subcontractors

1) The Recipient is responsible for handling all contractual and administrative issues arising out of or related to any subcontracts it enters into for the performance of this Agreement.

2) Nothing contained in this Agreement or otherwise creates any contractual relation between the Commission and any subcontractors, and no subcontract may relieve the Recipient of its responsibilities under this Agreement. The Recipient agrees to be as fully responsible to the Commission for the acts and omissions of its subcontractors or persons directly or indirectly employed by any of them as it is for the acts and omissions of persons directly employed by the Recipient.

The Recipient's obligation to pay its subcontractors is an independent obligation from the Commission's obligation to make payments to the Recipient. As a result, the Commission has no obligation to pay or enforce the payment of any funds to any subcontractor.

3) The Recipient is responsible for establishing and maintaining contractual agreements with and reimbursing each subcontractor for work performed in accordance with the terms of this Agreement.

b. Flow-Down Provisions

Subcontracts funded in whole or in part by this Agreement must include language conforming to the provisions below, unless the subcontracts are entered into by the University of California (UC) or the U.S. Department of Energy (DOE) national laboratories. UC may use the terms and conditions negotiated by the Energy Commission with UC for its subcontracts. DOE national laboratories may use the terms and conditions negotiated with DOE (please contact the Commission Grants Officer for these terms).

- Standard of Performance (Section 3)
- Legal Statements on Products (included in Section 5, "Products")
- Prevailing Wage (Section 10)
- Recordkeeping, Cost Accounting, and Auditing (Section 11)
- Equipment (Section 14)
- Indemnification (Section 17)
- Intellectual Property (Section 20)
- Access to Sites and Records (included in Section 22, "General Provisions")
- Nondiscrimination (included in Section 23, "Certifications and Compliance")
- Survival of the following sections:
 - Equipment (Section 14)
 - Recordkeeping, Cost Accounting, and Auditing (Section 11)
 - Intellectual Property (Section 20)
 - Access to Sites and Records (included in Section 22, "General Provisions")

Subcontracts funded in whole or in part by this Agreement must also include the following:

- A clear and accurate description of the material, products, or services to be procured.
- A detailed budget and timeline.
- Provisions that allow for administrative, contractual, or legal remedies in instances where subcontractors breach contract terms, in addition to sanctions and penalties as may be appropriate.
- Provisions for termination by the Recipient, including termination procedures and the basis for settlement.
- A statement that further assignments will not be made to any third or subsequent tier subcontractor without additional advance written consent of the Commission.

c. Audits

All subcontracts entered into for the performance of this Agreement are subject to examination and audit by the Energy Commission, Bureau of State Audits, or the California Public Utilities Commission for a period of three (3) years after payment of the Recipient's final invoice under this Agreement.

d. Copies of Subcontracts

The Recipient must provide a copy of its subcontracts upon request by the Energy Commission.

e. Conflicting Subcontract Terms

Prior to the execution of this Agreement, the Recipient will notify the CalSHAPE Program of any known or reasonably foreseeable conflicts between this Agreement and its agreements with any subcontractors (e.g., conflicting intellectual property or payment terms). If the Recipient discovers any such conflicts after the execution of this Agreement, it will notify the CalSHAPE Program of the conflict within fifteen (15) days of discovery. The Energy Commission may, without prejudice to its other remedies, terminate this Agreement if any conflict impairs or diminishes its value.

f. Penalties for Noncompliance

Without limiting the Commission's other remedies, failure to comply with the above requirements may result in the termination of this Agreement.

8. Payment of Funds

a. Timing of Payment

See Chapter 3, Section G, Timing of Payment, of the CalSHAPE Ventilation Commission Guidelines.

Final payment will only be made after the Energy Commission: (1) receives and approves the Recipient's final reporting; and (2) receives and accepts all other required documentation necessary for the Energy Commission to determine the total final amount due to the Recipient, based on actual and allowable Incurred Costs and Paid Costs under this Agreement, up to the total grant award amount.

Without limiting any other rights and remedies available to the Energy Commission, Recipient must return funds to the Energy Commission received under this Agreement if, for example, the Recipient was overpaid in the first payment, did not complete the project, or did not meet other program requirements.

b. Reimbursable Cost Requirements

In addition to any other requirements in this Agreement, the Energy Commission is only obligated to reimburse the Recipient for Incurred and Paid Costs that are (1) incurred during the Agreement Term; (2) invoiced within the required timeframes of this Agreement; (3) made in accordance with the Agreement's Budget; and (4) actual and allowable expenses under this Agreement.

ALL of the items in the Budget are capped amounts (i.e., maximums), and the Recipient can only bill its ACTUAL amount up to capped amounts listed in the Budget. For example, if the Budget includes an employee's hourly rate of \$50/hour but the employee is only paid \$40/hour, the Recipient can only bill for \$40/hour. Under the same example, if the employee earned \$70/hour but the Budget only lists \$50/hour, the Recipient can only bill for \$50. If the actual rates exceed the approved rates in the Budget, the difference may be charged to the agreement as a match share expenditure.

c. Payment Requests

Recipient agrees and acknowledges that time is of the essence in submitting the final payment request. The Commission has a limited period of time, set by law, in which it can reimburse funds under this Agreement. Without prejudice to the Commission's other rights, the Recipient risks not receiving any funds, and relieves the Commission of any duty and liability whatsoever to pay, for any payment requests received after the end of the Agreement.

d. Invoice Approval and Disputes:

Payment is subject to Energy Commission staff's approval. Payments will be made to the Recipient for undisputed invoices. An undisputed invoice is an invoice submitted by the Recipient for work performed, for which project expenditures and products meet all Agreement conditions, and for which additional evidence is not required to determine its validity.

The invoice will be disputed if all products due for the billing period have not been received and approved, if the invoice is inaccurate, or if it does not comply with the terms of this Agreement. If the invoice is disputed, the Recipient will be notified by the CEC.

e. Multiple Non-Energy Commission Funding Sources:

No payment will be made for costs identified in recipient invoices that have been or will be reimbursed by another source, including but not limited to an agreement with another government entity.

"Government Entity" means: (1) a state governmental agency; (2) a state college or university; (3) a local government entity or agency, including those created as a Joint Powers Authority; (4) an auxiliary organization of the California State University or a California community college; (5) the federal government; (6) a foundation organized to support the Board of Governors of the California Community Colleges; and (7) an auxiliary organization of the Student Aid Commission established under California Education Code Section 69522.

f. Reduced funding:

If the Energy Commission does not receive sufficient funds under the Budget Act or from the investor-owned utility administrators of the CalSHAPE program to fully fund the work identified in Exhibit A (Scope of Work), the following will occur:

- 1) If the Energy Commission has received a reduced amount of funds for the work, it may: (1) offer an Agreement amendment to the Recipient to reflect the reduced amount; or (2) cancel this Agreement (with no liability occurring to the State).
- 2) If the Energy Commission has received no funds for the work identified in Exhibit A: (1) this Agreement will be of no force and effect; (2) the State will have no obligation to pay any funds to the Recipient; and (3) the Recipient will have no obligation to perform any work under this Agreement.

g. Allowability of Costs

- 1) Allowable Costs

The costs for which the Recipient will be reimbursed under this Agreement include all costs, direct and indirect, incurred in the performance of the work identified in the Scope of Work. Costs must be incurred within the Agreement term. Factors to be considered in determining whether an individual item of cost is allowable include: (i) reasonableness of the item, including necessity of the item for the work; (ii) applicable federal cost principles or acquisition regulations incorporated by reference in Section 2 of this Agreement; and (iii) the terms and conditions of this Agreement.

2) Unallowable Costs

See Chapter 3, Section I, Ineligible Costs, of the CalSHAPE Ventilation Program Commission Guidelines.

3) Except as provided for in this Agreement or applicable California law or regulations, the Recipient will use the federal cost principles and/or acquisition regulations incorporated by reference in Section 2 of this Agreement when determining allowable and unallowable costs. In the event of a conflict, this Agreement takes precedence over the federal cost principles and/or acquisition regulations.

h. Final Invoice for Remaining Funds

See Chapter 4, Section C, Final Documentation and Invoice for Remaining Funds, of the CalSHAPE Ventilation Program Commission Guidelines. The Recipient must submit all invoices electronically by uploading them to the CalSHAPE Online System, which is found at <https://calshape.energy.ca.gov/>.

i. If the Recipient has not otherwise provided to the Commission documentation showing the Recipient's payment of Incurred Costs, the Recipient shall provide such documentation as soon as possible and not later than three working days from a request from Commission personnel.

j. Certification

The following certification will be included on each payment request form and signed by the Recipient's authorized officer:

The documents included in this request for payment are true and correct to the best of my knowledge and I have authority to submit this request. I certify that reimbursement for these costs has not and will not be received from any other sources, including but not limited to a government entity contract, subcontract, or other procurement method. For projects considered to be a public work, prevailing wages were paid to eligible workers who provided labor for the work covered by this invoice; the Recipient and all subcontractors have complied with prevailing wage laws.

9. **Reserved**

10. **Prevailing Wage**

a. Requirement

Projects funded by the Energy Commission often involve construction, alteration, demolition, installation, repair, or maintenance work over \$1,000. Such projects might be considered “public works” under the California Labor Code (See California Labor Code Section 1720 et seq. and Title 8 California Code of Regulations, Section 16000 et seq.). Public works projects require the payment of prevailing wages. Prevailing wage rates can be significantly higher than non-prevailing wage rates.

b. Determination of Project’s Status

Only the California Department of Industrial Relations (DIR) and courts of competent jurisdiction may issue legally binding determinations that a particular project is or is not a public work. If the Recipient is unsure whether the project funded by the Agreement is a “public work” as defined in the California Labor Code, it may wish to seek a timely determination from DIR or an appropriate court. As such processes can be time consuming, it may not be possible to obtain a timely determination before the date for performance of the Agreement.

By accepting this grant, the Recipient is fully responsible for complying with all California public works requirements, including but not limited to payment of prevailing wage. As a material term of this grant, the Recipient must either:

- 1) Timely obtain a legally binding determination from DIR or a court of competent jurisdiction before work begins on the project that the proposed project is not a public work; or
- 2) Assume that the project is a public work and ensure that:
 - Prevailing wages are paid unless and until DIR or a court of competent jurisdiction determines that the project is not a public work;
 - The project budget for labor reflects these prevailing wage requirements; and
 - The project complies with all other requirements of prevailing wage law, including but not limited to keeping accurate payroll records and complying with all working hour requirements and apprenticeship obligations.

California Prevailing Wage law provides for substantial damages and financial penalties for failure to pay prevailing wages when such payment is required.

c. Subcontractors and Flow-down Requirements

The Recipient will ensure that its subcontractors also comply with the public works/prevailing wage requirements above. The Recipient will ensure that all agreements with its subcontractors to perform work related to this Project contain the above terms regarding payment of prevailing wages on public works projects. The Recipient is responsible for any failure of its subcontractors to comply with California prevailing wage and public works laws.

d. Indemnification and Breach

Any failure of the Recipient or its subcontractors to comply with the above requirements will constitute breach of this Agreement which excuses the Commission's performance of this Agreement at the Commission's option, and will be at the Recipient's sole risk. In such a case, the Commission will refuse payment to the Recipient of any amount under this award and the Commission will be released, at its option, from any further performance of this Agreement or any portion thereof. The Recipient will indemnify the Energy Commission and hold it harmless for any and all financial consequences arising out of or resulting from the failure of the Recipient and/or any of its subcontractors to pay prevailing wages or to otherwise comply with the requirements of prevailing wage law.

e. Budget

The Recipient's budget on public works projects must indicate which job classifications are subject to prevailing wage. For detailed information about prevailing wage and the process to determine if the proposed project is a public work, the Recipient may wish to contact DIR or a qualified labor attorney for guidance.

f. Covered Trades

For public works projects, the Recipient may contact DIR for a list of covered trades and the applicable prevailing wage.

g. Questions

If the Recipient has any questions about this contractual requirement or the wage, record keeping, apprenticeship, or other significant requirements of California prevailing wage law, the Recipient should consult DIR and/or a qualified labor attorney before entering into this Agreement.

h. Certification

The Recipient will certify to the Energy Commission on each payment request form either that: (a) prevailing wages were paid to eligible workers who provided labor for work covered by the payment request and the Recipient and all contractors and subcontractors otherwise complied with all California prevailing wage laws; or (b) the project is not a public work requiring the payment of prevailing wages. In the latter case, the Recipient will provide competent proof of a DIR or court determination that the project is not a public work requiring the payment of prevailing wages.

Prior to the release of any retained funds under this Agreement, the Recipient will submit to the Energy Commission the above-described certificate signed by the Recipient and all contractors and subcontractors performing public works activities on the project. Absent this certificate, the Recipient will have no right to any funds under this Agreement, and Commission will be relieved of any obligation to pay any funds.

11. Recordkeeping, Cost Accounting, and Auditing

a. Cost Accounting

The Recipient will keep separate, complete, and correct accounting of the costs involved in completing the project and any match-funded portion of the project. The Commission or its agent will have the right to examine the Recipient's books of accounts at all reasonable times, to the extent necessary to verify the accuracy of the Recipient's reports.

b. Accounting Procedures

The Recipient's costs will be determined on the basis of its accounting system procedures and practices employed as of the effective date of this Agreement, provided that the Recipient uses generally accepted accounting principles and cost reimbursement practices. The Recipient's cost accounting practices used in accumulating and reporting costs during the performance of this Agreement will be consistent with the practices used in estimating costs for any proposal to which this Agreement relates; provided that such practices are consistent with the other terms of this Agreement and that such costs may be accumulated and reported in greater detail during performance of this Agreement.

The Recipient's accounting system will distinguish between direct and indirect costs. All costs incurred for the same purpose, in like circumstances, are either direct costs only or indirect costs only with respect to costs incurred under this Agreement.

c. Inspections, Assessment, and Studies

If selected, the Recipient must cooperate with and participate in the following:

- 1) An assessment of a funded project's greenhouse gas reductions and energy savings. This may include, but is not limited to, requests from Energy Commission staff or its delegate for data, project and equipment information, and reasonable access to the project site to assist with determining greenhouse gas reductions and energy savings attributable to the funded project. Costs associated with any activities associated with such an assessment will not be funded by a CalSHAPE Program grant.
- 2) A site inspection and verification of installation and operation of new fixtures and appliances. This may include, but is not limited to, providing Energy Commission staff or its delegates reasonable access to the funded project site to inspect and verify installation and operation. Recipient understands that any such inspection and verification by Energy Commission staff or its delegates is not a safety inspection.
- 3) A measurement and evaluation study that will be used to analyze current program performance and improve future program designs. This may include but is not limited to providing Energy Commission staff or its delegates data, project and equipment information, and reasonable access to the funded project site.

d. Audit Rights

The Recipient will maintain books, records, documents, and other evidence, based on the procedures set forth above, sufficient to reflect properly all costs claimed to have been incurred in the performance of this Agreement. The Energy Commission, another state agency, and/or a public accounting firm designated by the Energy Commission may audit the Recipient's accounting records at all reasonable times, with prior notice by the Energy Commission.

It is the intent of the parties that the audits will ordinarily be performed not more frequently than once every twelve (12) months during the performance of the work and once at any time within three (3) years after payment by the Energy Commission of the Recipient's final invoice. However, performance of any such interim audits by the Energy Commission does not preclude further audit. The Energy Commission may audit books, records, documents, and other evidence relevant to the Recipient's royalty payment obligations (see Section 21) for a period of ten (10) years after payment of the Recipient's final invoice.

The Recipient will allow the auditor(s) to access such records during normal business hours, and will allow interviews of any employees who might reasonably have information related to such records. The Recipient will include a similar right of the state to audit records and interview staff in any subcontract related to the performance of this Agreement.

e. Refund to the Energy Commission

If the Energy Commission determines that any invoiced and paid amounts exceed the actual allowable incurred costs, the Recipient will repay the amounts to the Energy Commission within thirty (30) days of request or as otherwise agreed by the Energy Commission and the Recipient. If the Energy Commission does not receive such repayments, it will be entitled to take any actions enforce any remedies available to it, such as withholding further payments to the Recipient and seeking repayment from the Recipient.

f. Audit Cost

The Recipient will bear its cost of participating in any audit (e.g., mailing or travel expenses). The Energy Commission will bear the cost of conducting the audit unless the audit reveals an error detrimental to the Energy Commission that exceeds more than ten percent (10%) or \$5,000 (whichever is greater) of the amount audited. The Recipient will pay the refund as specified in subsection (d), and will reimburse the Energy Commission for reasonable costs and expenses incurred by the Commission in conducting the audit.

g. Match or Cost Share

If the budget includes a match share requirement, the Recipient's commitment of resources, as described in this Agreement, is a required expenditure for receipt of Energy Commission funds. The funds will be released only if the required match percentages are expended. The Recipient must maintain accounting records detailing the expenditure of the match (actual cash and in-kind, non-cash services), and report on match share expenditures on its request for payment.

12. *Workers' Compensation Insurance*

- a. The Recipient warrants that it carries Worker's Compensation Insurance for all of its employees who will be engaged in the performance of this Agreement, and agrees to furnish to the CalSHAPE Program satisfactory evidence of this insurance upon the CalSHAPE Program's request.
- b. If the Recipient is self-insured for worker's compensation, it warrants that the self-insurance is permissible under the laws of the State of California and agrees to furnish to the CalSHAPE Program satisfactory evidence of the insurance upon the CalSHAPE Program's request.

13. *Permits and Clearances*

The Recipient is responsible for ensuring that all necessary permits and environmental documents are prepared and that clearances are obtained from the appropriate agencies.

14. *Equipment*

Title to equipment acquired by the Recipient with grant funds will vest in the Recipient. The Recipient may use the equipment in the project or program for which it was acquired as long as needed, regardless of whether the project or program continues to be supported by grant funds. However, the Recipient may not sell, lease, or encumber the property (i.e., place a legal burden on the property such as a lien) during the Agreement term without Energy Commission Staff's prior written approval.

The Recipient may refer to the applicable federal regulations incorporated by reference in this Agreement for guidance regarding additional equipment requirements.

15. Stop Work

Energy Commission staff may, at any time by written notice to the Recipient, require the Recipient to stop all or any part of the work tasks in this Agreement. Stop work orders may be issued for reasons such as a project exceeding budget, noncompliance with the standard of performance, out of scope work, project delays, and misrepresentations.

- a. Compliance. Upon receipt of a stop work order, the Recipient must immediately take all necessary steps to comply with the order and to stop the incurrence of costs allocable to the Energy Commission.
- b. Canceling a Stop Work Order. The Recipient may resume the work only upon receipt of written instructions from Energy Commission staff.

16. Termination

a. Purpose

Because the Energy Commission is a state entity and provides funding on behalf of all California ratepayers, it must be able to terminate the Agreement upon the default of the Recipient and to proceed with the work required under the Agreement in any manner it deems proper. The Recipient agrees that upon any of the events triggering the termination of the Agreement by the Energy Commission, the Energy Commission has the right to terminate the Agreement, and it would constitute bad faith of the Recipient to interfere with the immediate termination of the Agreement by the Energy Commission.

b. With Cause

The Energy Commission may, for cause, terminate this Agreement upon giving five (5) calendar days advance written notice to the Recipient. In this event, the Recipient will use all reasonable efforts to mitigate its expenses and obligations. The Recipient will relinquish possession of equipment purchased for this Agreement with Energy Commission funds to the Commission, or the Recipient may purchase the equipment as provided by the terms of this Agreement, with approval of the Energy Commission.

The term “for cause” includes but is not limited to the following:

- Partial or complete loss of match funds;
- Reorganization to a business entity unsatisfactory to the Energy Commission;
- Retention or hiring of subcontractors, or replacement or addition of personnel, that fail to perform to the standards and requirements of this Agreement;
- The Recipient’s inability to pay its debts as they become due and/or the Recipient’s default of an obligation that impacts its ability to perform under this Agreement; or
- Significant change in state or Energy Commission policy such that the work or product being funded would not be supported by the Commission.

c. Without Cause

The Energy Commission may terminate this Agreement without cause upon giving thirty (30) days advance written notice to the Recipient. In this event, the Recipient will use all reasonable efforts to mitigate its expenses and obligations.

17. Indemnification

To the extent allowed under California law, the Recipient will indemnify, defend, and hold harmless the state (including the Energy Commission) and state officers, agents, and employees from any and all claims and losses in connection with the performance of this Agreement.

18. Reserved

19. Reserved

20. Intellectual Property

- a. The Energy Commission makes no claim to intellectual property developed under this Agreement that is not specified for delivery, except as expressly provided herein.

“Intellectual property” means: (a) inventions, technologies, designs, drawings, data, software, formulas, compositions, processes, techniques, works of authorship, trademarks, service marks, and logos that are created, conceived, discovered, made, developed, altered, or reduced to practice with Agreement or match funds during or after the Agreement term; (b) any associated proprietary rights to these items, such as patent and copyright; and (c) any upgrades or revisions to these items.

“Works of authorship” does not include written products created for Agreement reporting and management purposes, such as reports, summaries, lists, letters, agendas, schedules, and invoices.

- b. The Energy Commission owns all products identified in the Scope of Work, with the exception of products that fall within the definition of “intellectual property.”

“Product” means any tangible item specified for delivery to the Energy Commission in the Scope of Work.

- c. Both the Energy Commission and the California Public Utilities Commission have a no-cost, non-exclusive, transferable, irrevocable, royalty-free, worldwide, perpetual license to use, publish, translate, modify, and reproduce intellectual property for governmental purposes, including but not limited to providing data and reports to the California Public Utilities Commission, State legislature, and Utilities and using data for the development of future programs.

- d. Intellectual Property Indemnity

The Recipient may not, in supplying work under this Agreement, knowingly infringe or misappropriate any intellectual property right of a third party, and will take reasonable actions to avoid infringement.

To the extent allowed under California law, the Recipient will defend and indemnify the Energy Commission and the California Public Utilities Commission from and against any claim, lawsuit, or other proceeding, loss, cost, liability, or expense (including court costs and reasonable fees of attorneys and other professionals) to the extent arising out of: (i) any third party claim that a product infringes any patent, copyright, trade secret, or other intellectual property right of any third party; or (ii) any third party claim arising out of the negligent or other tortious acts or omissions by the Recipient or its employees, subcontractors, or agents in connection with or related to the products or the Recipient's performance under this Agreement.

21. Reserved

22. General Provisions

a. Governing Law

This Agreement is governed by the laws of the State of California as to interpretation and performance.

b. Independent Capacity

In the performance of this Agreement, the Recipient and its agents, subcontractors, and employees will act in an independent capacity and not as officers, employees, or agents of the State of California.

c. Assignment

This Agreement is not assignable or transferable by the Recipient either in whole or in part without the consent of the Energy Commission in the form of an amendment.

d. Timeliness

Time is of the essence in this Agreement.

e. Severability

If any provision of this Agreement is unenforceable or held to be unenforceable, all other provisions of this Agreement will remain in full force and effect.

f. Waiver

No waiver of any breach of this Agreement constitutes waiver of any other breach. All remedies in this Agreement will be taken and construed as cumulative, meaning in addition to every other remedy provided in the Agreement or by law.

g. Assurances

The Commission reserves the right to seek further written assurances from the Recipient and its team that the work under this Agreement will be performed in accordance with the terms of the Agreement.

h. Change in Business

- 1) The Recipient will promptly notify the Energy Commission of the occurrence of any of the following:
 - a) A change of address.
 - b) A change in business name or ownership.
 - c) The existence of any litigation or other legal proceeding affecting the project or Agreement.

- d) The occurrence of any casualty or other loss to project personnel, equipment, or third parties.
 - e) Receipt of notice of any claim or potential claim against the Recipient for patent, copyright, trademark, service mark, and/or trade secret infringement that could affect the Energy Commission's rights.
 - 2) The Recipient must provide the CalSHAPE Program with written notice of a planned change or reorganization of the type of business entity under which it does business. A change of business entity or name change requires an amendment assigning or novating the Agreement to the changed entity. If the Energy Commission does not seek to amend this Agreement or enter into a new agreement with the changed or new entity for any reason (including that the Commission is not satisfied that the new entity can perform in the same manner as the Recipient), it may terminate this Agreement as provided in the "Termination" section.
- i. Access to Sites and Records
Energy Commission and California Public Utilities Commission staff and representatives will have reasonable access to all project sites and to all records related to this Agreement.
- j. Prior Dealings, Custom, or Trade Usage
These terms and conditions may not be modified or supplemented by prior dealings, custom, or trade usage.
- k. Survival of Terms
Certain provisions will survive the completion or termination date of this Agreement for any reason. The provisions include but are not limited to:
 - Legal Statements on Products (included in Section 5, "Products")
 - Payment of Funds (Section 8)
 - Recordkeeping, Cost Accounting, and Auditing (Section 11)
 - Equipment (Section 14)
 - Termination (Section 16)
 - Indemnification (Section 17)
 - Intellectual Property (Section 20)
 - Change in Business (see this section)
 - Access to Sites and Records (see this section)

23. *Certifications and Compliance*

a. Federal, State, and Local Laws

The Recipient must obtain all required permits and shall comply with all applicable federal, state and local laws, codes, rules, and regulations for all work performed under the Agreement.

b. Nondiscrimination Statement of Compliance

During the performance of this Agreement, the Recipient and its subcontractors will not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, sexual orientation, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition, age, marital status, or denial of family care leave. The Recipient and its subcontractors will ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment.

The Recipient and its subcontractors will comply with the provisions of the Fair Employment and Housing Act (Government Code Sections 12990 et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 11000 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 (a-f), set forth in Chapter 5 of Division 4.1 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part of it as if set forth in full. The Recipient and its subcontractors will give written notice of their obligations under this section to labor organizations with which they have a collective bargaining or other Agreement.

The Recipient will include the nondiscrimination and compliance provisions of this section in all subcontracts to perform work under this Agreement.

c. Drug-Free Workplace Certification

By signing this Agreement, the Recipient certifies under penalty of perjury under the laws of the State of California that it will comply with the requirements of the Drug-Free Workplace Act of 1990 (Government Code Section 8350 et seq.) and will provide a drug-free workplace by taking the following actions:

- 1) Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited, and specifying actions to be taken against employees for violations as required by Government Code Section 8355(a).
- 2) Establish a Drug-Free Awareness Program as required by Government Code Section 8355(b) to inform employees about all of the following:
 - The dangers of drug abuse in the workplace;
 - The person's or organization's policy of maintaining a drug-free workplace;
 - Any available counseling, rehabilitation, and employee assistance programs; and
 - Penalties that may be imposed upon employees for drug abuse violations.
- 3) Provide, as required by Government Code Section 8355(c), that every employee who works on the proposed project:
 - Will receive a copy of the company's drug-free policy statement; and
 - Will agree to abide by the terms of the company's statement as a condition of employment on the project.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both, and the Recipient may be ineligible for any future state awards if the Commission determines that any of the following has occurred: (1) the Recipient has made false certification, or (2) violates the certification by failing to carry out the requirements as noted above.

d. National Labor Relations Board Certification (Not applicable to public entities)

The Recipient, by signing this Agreement, swears under penalty of perjury that no more than one final unappealable finding of contempt of court by a federal court has been issued against the Recipient within the immediately preceding two year period because of the Recipient's failure to comply with an order of a federal court that orders the Recipient to comply with an order of the National Labor Relations Board.

e. Child Support Compliance Act (Applicable to California Employers)

For any agreement in excess of \$100,000, the Recipient acknowledges that:

- 1) It recognizes the importance of child and family support obligations and will fully comply with all applicable state and federal laws relating to child and family support enforcement, including but not limited to disclosure of information and compliance with earnings assignment orders, as provided in Chapter 8 (commencing with section 5200) of Part 5 of Division 9 of the Family Code; and
- 2) To the best of its knowledge is fully complying with the earnings assignment orders of all employees and is providing the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

f. Air or Water Pollution Violation

Under state laws, the Recipient will not be:

- 1) In violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district;
- 2) Subject to a cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or
- 3) Finally determined to be in violation of provisions of federal law relating to air or water pollution.

g. Americans With Disabilities Act

By signing this Agreement, the Recipient assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. Section 12101, et seq.), which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

24. Reserved

25. Commission Remedies for Recipient's Non-Compliance

Without limiting any of its other remedies, the Commission may, for Recipient's noncompliance of any Agreement requirement, withhold future payments, demand and be entitled to repayment of past reimbursements, or suspend or terminate this Agreement. The tasks in the Scope of Work are non-severable, and completion of all of them is material to this Agreement. Thus, the Commission, without limiting its other remedies, is entitled to repayment of all funds paid to Recipient if the Recipient does not timely complete all tasks in the Scope of Work.

26. Definitions

- **Agreement Term** means the length of this Agreement, as specified on the Agreement signature page (form CEC-146).
- **Data** means any recorded information that relates to the project funded by the Agreement, whether created or collected before or after the Agreement's effective date.
- **Effective Date** means the date on which this Agreement is signed by the last party required to sign, provided that signature occurs after the Agreement has been approved by the Energy Commission at a business meeting or by the Executive Director or his/her designee.
- **Equipment** means products, objects, machinery, apparatus, implements, or tools that are purchased or constructed with Energy Commission funds for the project, and that have a useful life of at least one year and an acquisition unit cost of at least \$5,000. "Equipment" includes products, objects, machinery, apparatus, implements, or tools that are composed by over thirty percent (30%) of materials purchased for the project. For purposes of determining depreciated value of equipment used in the Agreement, the project will terminate at the end of the normal useful life of the equipment purchased and/or developed with Energy Commission funds. The Energy Commission may determine the normal useful life of the equipment.
- **Intellectual Property** means: (a) inventions, technologies, designs, drawings, data, software, formulas, compositions, processes, techniques, works of authorship, trademarks, service marks, and logos that are created, conceived, discovered, made, developed, altered, or reduced to practice with Agreement or match funds during or after the Agreement term; (b) any associated proprietary rights to these items, such as patent and copyright; and (c) any upgrades or revisions to these items.

"Works of authorship" does not include written products created for Agreement reporting and management purposes, such as reports, summaries, lists, letters, agendas, schedules, and invoices.
- **Invention** means intellectual property that is patentable.
- **Match Funds** means cash or in-kind (i.e., non-cash) contributions provided by the Recipient or a third party for a project funded by the Energy Commission. If this Agreement resulted from a solicitation, refer to the solicitation's discussion of match funding for guidelines specific to the project.

- **Materials** means the substances used to construct, or as part of, a finished object, commodity, device, article, or product and that does not meet the definition of Equipment.
- **Ownership** means exclusive possession of all rights to property, including the right to use and transfer property.
- **Product** means any tangible item specified for delivery to the Energy Commission in the Scope of Work.
- **Project** means the entire effort undertaken and planned by the Recipient and consisting of the work funded by the Energy Commission. The project may coincide with or extend beyond the Agreement term.
- **State** means the state of California and all California state agencies within it, including but not limited to commissions, boards, offices, and departments.

Notice of Exemption**Appendix E**

To: Office of Planning and Research
P.O. Box 3044, Room 113
Sacramento, CA 95812-3044

County Clerk

County of: _____

From: (Public Agency): _____

(Address)

Project Title: _____

Project Applicant: _____

Project Location - Specific:

Project Location - City: _____ Project Location - County: _____

Description of Nature, Purpose and Beneficiaries of Project:

Name of Public Agency Approving Project: _____

Name of Person or Agency Carrying Out Project: _____

Exempt Status: **(check one):**

- ☐ Ministerial (Sec. 21080(b)(1); 15268);
- ☐ Declared Emergency (Sec. 21080(b)(3); 15269(a));
- ☐ Emergency Project (Sec. 21080(b)(4); 15269(b)(c));
- ☐ Categorical Exemption. State type and section number: _____
- ☐ Statutory Exemptions. State code number: _____

Reasons why project is exempt:

Lead Agency _____

Contact Person: _____ Area Code/Telephone/Extension: _____

If filed by applicant:

1. Attach certified document of exemption finding.
2. Has a Notice of Exemption been filed by the public agency approving the project? Yes No

Signature: _____ Date: _____ Title: _____

Signed by Lead Agency Signed by Applicant

Authority cited: Sections 21083 and 21110, Public Resources Code.
Reference: Sections 21108, 21152, and 21152.1, Public Resources Code.

Date Received for filing at OPR: _____



Project Proposal

Redwood Coast Montessori Charter School

793 K St, Arcata, CA 95521

Prepared by

Patricia Terry

pterry@redwoodenergy.org

Cell: 707-382-2098

Fax: 707-269-1777

Redwood Coast Energy Authority

Executive Summary

This project proposal identifies opportunities that are available for saving energy, reducing costs, and reducing emissions through eligible Measures.

This Project Proposal includes estimates of available RCEA incentives, Direct Install fees remaining after the incentive is applied ("Copay"), and approximate costs for installation along with estimates of energy, utility, and emission savings. All energy savings estimates provided within the Project Proposal are based on CPUC reviewed data and are not intended to be accurate for customer's specific site. RCEA does not guarantee that any specific level of energy, cost, or emission savings will result from the implementation of DI Program recommendations. Customers proceeding with Contractor Installations are responsible for verifying the feasibility of installing Measures proposed by RCEA and obtaining all permits necessary to install the Measures.

We encourage you to seriously consider the recommendations contained within this proposal and to take action soon as program incentives may change. Do not hesitate to give us a call if you have questions or need an explanation about anything presented throughout the report.

Summary of Recommended Upgrades with Incentives

Lighting

LED Type B Lamp and Ballast Retrofit

The school has mostly T8 linear fluorescent lamps in newer fixtures. Retrofitting both the ballasts and lamps in these fixtures will save the most energy and have the longest life. Type B LED lamps have a lifetime of 50,000 hours. We are currently running a special campaign to replace these lamps and ballast at no-cost to the customer.

Estimated Project Cost:	\$8,500.00
RCEA Rebate:	\$8,500.00
Customer Cost:	\$0
Demand Reduction (kW):	0.5500
Energy Savings (kWh):	5,720.00
Annual Savings:	\$1,544.40
Monthly Savings:	\$87.78

LED Fixture Replacement

For the exterior wall-packs which are 70W and 350W Metal Halides, the best solution is a full fixture replacement with an LED fixture with a lifetime of 100,000 hours or more. **Our program can provide an incentive for the installation and provide project management support.**

Estimated Project Cost:	\$2,100.00
RCEA Rebate:	\$1,653.59
Customer Cost:	\$446.41
Demand Reduction (kW):	0.3700
Energy Savings (kWh):	3,268.60
Annual Savings:	\$887.38
Simple Payback (Yrs):	0.5

Hot Water

Heat Pump Hot Water Heater

The school has a 59-gallon natural gas storage hot water heater providing hot water to bathroom and kitchen sinks. To reduce greenhouse gas emissions associated with burning natural gas, and to more efficiently heat water, the water heater could be replaced with a heat-pump water heater. Heat Pump water heaters use electricity to heat the water using a process that moves rather than generates heat. This heats the water much more efficiently than a natural gas water heater and is even more efficient than a standard electric resistance water heater. RCEA provides incentives for installing heat pump water heaters.

Estimated Project Cost:	\$2,557.33
RCEA Rebate:	\$600
Customer Cost:	\$1,957.33
Estimated increase in electricity use (kWh):	6,600
Estimated reduction in gas use (Therms):	710

HVAC (Heating Ventilation and Air Conditioning)

Demand Controlled Ventilation

The school has 6 package units on the roof providing heating and cooling for the school as well as ventilation. Installing CO2 monitors can determine if adequate ventilation is being provided and also shut off ventilation systems when rooms are empty.

Estimated Project Cost:	\$3,479.52
RCEA Rebate:	\$3,479.52
Customer Cost:	\$0
Demand Reduction (kW):	-39.6
Energy Savings (kWh):	876.0
Annual Savings:	\$236.52

Packaged Heat Pump Air Conditioner, Fuel Substitution

Replacing the natural gas package units with heat pump package units will reduce greenhouse gas emissions associated with burning natural gas. Heat pumps also provide space heating in a more energy efficient manner than furnaces or electric resistance heating. RCEA provides incentives for installing heat pump package units.

Estimated Project Cost:	\$31,994.16
RCEA Rebate:	\$5,400
Customer Cost:	\$26,594.16
Estimated increase in electricity use (kWh):	10,609.44
Estimated reduction in gas use (Therms):	3,268.60

Next Steps

RCEA's Customer Energy Solutions program can assist with project management and rebate processing. Please follow the next steps:

1. **Sign and return the Participation Agreement sent via Docusign.**
2. Work with your Energy Technician to determine which projects you would like to complete.
3. **Sign and return the attached Incentive Reservation Request.** If needed, we can send this form through DocuSign for electronic signature.
4. **Schedule your installation.** For lighting and controls, you can use RCEA's partner contractor, or a contractor of your choice. RCEA can assist with finding a contractor for your HVAC, hot water and other projects.

After Installation:

5. **Sign and return Installation Acceptance form.** This will be sent to you after your installation is completed and will include any changes to the scope or quantities.
6. Once all the documentation has been received and verified, **RCEA will send the rebate to the you or the contractor.**

Appendices

- Specification sheets for proposed products. ***Specification sheets are for illustrative purposes and final products will be determined by the installation contractor.***
- Incentive Reservation Request
- Completion and Acceptance Certificate



Incentive Reservation Request

RCEA Non-Residential Direct Install Program

Contractor Installation

Please work with your RCEA Energy Advisor to adjust the Project Proposal to match your intended project scope before this Incentive Reservation Request is submitted. Before proceeding with project installation, submit this Incentive Reservation Request to Redwood Coast Energy Authority (RCEA) for approval. RCEA requires documentation of the final installation costs of your project (see Next Steps 2c on the reverse) because your incentive cannot exceed your final installation cost. When project scope changes occur after the approval of the Incentive Reservation Request, please notify your RCEA Energy Advisor right away and they can recalculate your estimated incentive upon your request.

Site Name		Estimated Incentive Reservation Requested
Address		City, State, Zip Code
Phone Number	Email Address	

The undersigned hereby acknowledges and agrees to the following:

Incentive funds are reserved for 90 days upon RCEA approval of the Incentive Reservation Request. Extension requests will be considered on a case-by-case basis. The amount of the incentive reservation request is an estimate and shall match the total incentive listed in your adjusted Project Proposal. The actual incentive awarded will be based on the results of the post-installation project inspection and the final installation costs. Submission or approval of this Incentive Reservation Request is not a guarantee of receiving incentive funds. Customer acknowledges that the terms and conditions for participating in the Direct Install Program and receiving incentive payments are described in the Customer Participation Agreement.

Signature of Authorized Customer Agent	Date
(print name)	Title

RCEA- Internal Use Only

RCEA Determination <input type="checkbox"/> Approved / <input type="checkbox"/> Disqualified	Estimated Incentive Reserved by RCEA
RCEA Approval	Date
RCEA Energy Advisor (print name)	Title



Incentive Reservation Request

RCEA Non-Residential Direct Install Program

Contractor Installation

NEXT STEPS

Once your Incentive Reservation Request is approved, please commence with the next steps outlined below. Call your RCEA Energy Advisor if you have any questions.

1. **Have your RCEA Energy Advisor review your equipment list before purchase.** Send your RCEA Energy Advisor the full equipment list including all technology specifications and quantities so they can verify program requirements are met before you purchase equipment. Incentives are only available for technologies meeting specifications.
2. **Hire a licensed contractor to install the energy efficient equipment/ controls included in the Project Proposal.** Customer may install equipment themselves if they are qualified. Apply for all necessary permits. We recommend you include the following terms in your contract with your contractor to ensure your project meets program requirements:
 - a. Contractor agrees to accept the incentive payment from RCEA as a partial project payment thereby reducing your upfront project cost.
 - b. Contractor will provide RCEA a completed IRS Form W-9 from the contractor.
 - c. **Contractor must provide RCEA documentation of the project costs with labor, materials, and miscellaneous costs itemized separately for each unique measure.** See your RCEA Energy Advisor for guidance on which installed products are unique measures.
 - d. Contractor will provide warranty information to the customer for all equipment installed.
3. **Update your RCEA Energy Advisor of all project scope changes and installation cost changes as they occur.**
4. **Complete the installation within 90 days of approval of the Incentive Reservation Request.** Close out all necessary permits. Extension requests can be submitted to your RCEA Energy Advisor.
5. **Once your installation is complete, inform your RCEA Energy Advisor.** You will then need to sign and submit a Project Completion and Acceptance form. At this stage, you will have the ability to assign your incentive payment to your installing contractor.
6. **Send your RCEA Energy Advisor the final installed equipment list (including specifications and installed quantities) and a copy of the project invoice. The project invoice must itemize materials, labor, and miscellaneous costs for each unique measure separately.** You will need to request this from your contractor. Make sure your contractor has also provided you with warranty information for all equipment installed.
7. **Schedule a project inspection with your RCEA Energy Advisor.** Your RCEA Energy Advisor will need to complete an on-site inspection of all installed equipment.
8. **Send your RCEA Energy Advisor a completed W9 form from your contractor.** If you have installed yourself, a W9 is not required.
9. **Your RCEA Energy Advisor will calculate your incentive based on the equipment and quantities verified in the project inspection and your final project costs.** If the equipment or quantities don't match the RCEA Project Proposal, the customer will be given the chance to correct any discrepancies at their own expense within 14 days after which a second project inspection will be required.

Once all program requirements have been met, your RCEA Energy Advisor will notify you that your project has been closed out. **RCEA will process and send your incentive check within 30 days from project close out.**



REDWOOD COAST
EnergyAuthority

Project Completion and Acceptance

RCEA Non-Residential Direct Install Program

Contractor Installation

Please notify your RCEA Energy Advisor of all differences between the RCEA Project Proposal and the final installed equipment including differences in technology specifications and quantities before submitting this Project Completion and Acceptance form.

Site Name		Installation Completion Date
Address		City, State, Zip Code
Phone Number	Email Address	

The undersigned hereby acknowledges and agrees to the following:

- The project was installed in accordance with the terms, conditions, and program requirements listed in the RCEA Non-Residential Direct Install Program Customer Participation Agreement.
- The project is now completed satisfactorily and is ready to be inspected.
- All applicable permits were obtained and finalized.

Signature of Authorized Customer Agent	Date
(print name)	Title

INCENTIVE ASSIGNMENT

Select Installation Type: ☐ Contractor Installation (payment will be assigned to contractor)

☐ Customer Installation (payment will be assigned to customer)

Please address the required Next Steps listed below so that payment can be made promptly. Be sure to inform your contractor of all items needed.

By signing and entering the information below, I am voluntarily assigning my RCEA incentive payment for the completed installation listed above.

Signature of Authorized Customer Agent	Date
(print name of Authorized Agent)	Title



REDWOOD COAST
EnergyAuthority

Project Completion and Acceptance

RCEA Non-Residential Direct Install Program

Contractor Installation

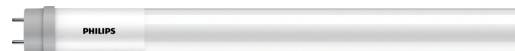
Mailing Address for Payment: Address, City, State, Zip		Contact Person Regarding Payment
Name of Party Assigned Incentive Payment (As it will appear on payment check)	Phone and Email of Contact Person	

NEXT STEPS

Congratulations on completing your project. The following steps are required to close out your project.

1. **Send your RCEA Energy Advisor the final installed equipment list (including specifications and installed quantities) and a copy of the project invoice. The project invoice must itemize materials and labor separately.** You will need to request these from your contractor. Make sure your contractor has also provided you with warranty information for all equipment installed.
2. **Schedule a project inspection with your RCEA Energy Advisor.** Your RCEA Energy Advisor will need to complete an on-site inspection of all installed equipment.
3. **Send your RCEA Energy Advisor a completed W9 form from your contractor.** If you have installed yourself, a W9 is not required.
4. **Your RCEA Energy Advisor will calculate your incentive based on the equipment and quantities verified in the project inspection.** If the equipment or quantities don't match the RCEA Project Proposal, the customer will be given the chance to correct any discrepancies at their own expense within 14 days after which a second project inspection will be required.

Once all program requirements have been met, your RCEA Energy Advisor will notify you that your project has been closed out. **RCEA will process and send your incentive check within 30 days from project close out.**



T8

9.9T8/COR/48-840/MF16/G 10/1

Our TLEDs are available in InstantFit (Type A / Type C) or MainsFit (Ballast bypass / Type B) versions. The InstantFit lamps work on a broad variety of ballasts and LED drivers. Only InstantFit has over 15,000 lamp & ballast combinations delivering even light output, energy savings and a long lifetime. Our MainsFit products feature a double-ended design, simplifying installation while a proprietary safety circuit minimizes a shock risk. Lamp sizes range from 2-foot to 8-foot and U-bend with a variety of lumen outputs.

Product data

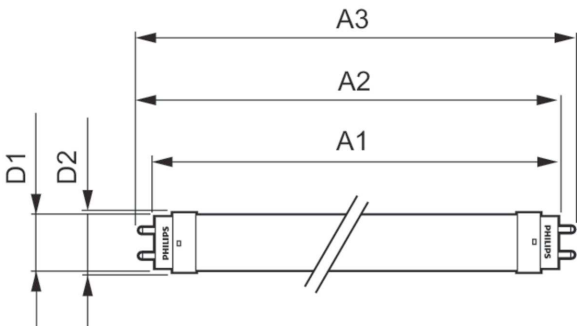
General information	
Cap-Base	G13 [Medium Bi-Pin Fluorescent]
EU RoHS compliant	Yes
Nominal Lifetime (Nom)	50000 h
Switching Cycle	50000X
Technical Type	9.9- 32W
Light technical	
Color Code	840 [CCT of 4000K]
Beam Angle (Nom)	240 °
Luminous Flux (Nom)	1650 lm
Luminous Flux (Rated) (Nom)	1650 lm
Color Designation	Cool White (CW)
Correlated Color Temperature (Nom)	4000 K
Luminous Efficacy (rated) (Nom)	166.00 lm/W
Color Consistency	<6
Color Rendering Index (Nom)	80
LLMF At End Of Nominal Lifetime (Nom)	70 %

Operating and electrical	
Input Frequency	50 to 60 Hz
Power (Nom)	9.9 W
Lamp Current (Max)	100 mA
Lamp Current (Min)	43 mA
Wattage Equivalent	32 W
Starting Time (Nom)	0.5 s
Warm Up Time to 60% Light (Nom)	0.5 s
UL Type	Type B - bypass the ballast
Power Factor (Nom)	0.9
Voltage (Nom)	120-277 V
Temperature	
T-Ambient (Max)	45 °C
T-Ambient (Min)	-20 °C
T-Storage (Max)	65 °C
T-Storage (Min)	-40 °C
T-Case Maximum (Nom)	70 °C

Controls and dimming	
Dimmable	No
Mechanical and housing	
Bulb Finish	Frosted
Bulb Material	Glass
Product Length	1200 mm
Bulb Shape	Tube, double-ended
Approval and application	
Energy Saving Product	Yes
Approval Marks	RoHS compliance UL certificate

Energy Consumption kWh/1000 h	- kWh
Product data	
Order product name	9.9T8/COR/48-840/MF16/G 10/1
EAN/UPC - Product	046677557430
Order code	929002326004
Numerator - Quantity Per Pack	1
Numerator - Packs per outer box	10
Material Nr. (12NC)	929002326004
Net Weight (Piece)	0.240 kg

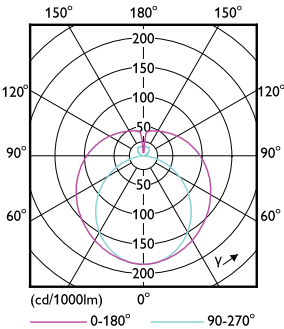
Dimensional drawing



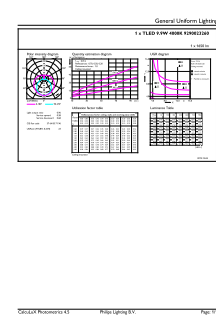
9.9T8/COR/48-840/MF16/G 10/1

Product	D1	D2	A1	A2	A3
9.9T8/COR/48-840/MF16/G 10/1	25.7 mm	28 mm	1198 mm	1205 mm	1212 mm

Photometric data

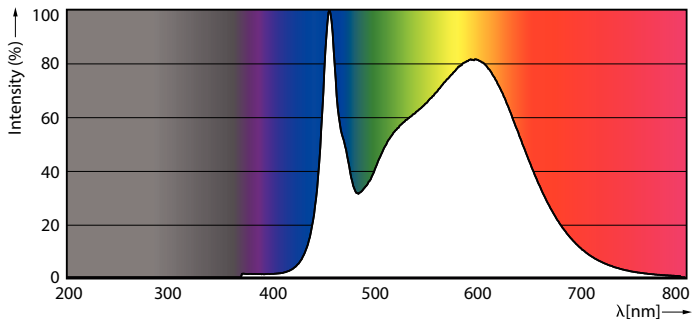


LEDtube 9,9W G13



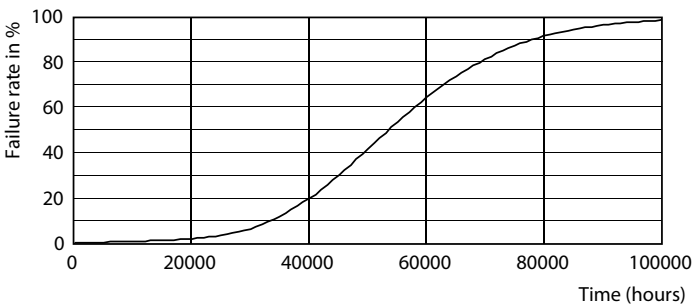
LEDtube 9,9W G13 840

Photometric data

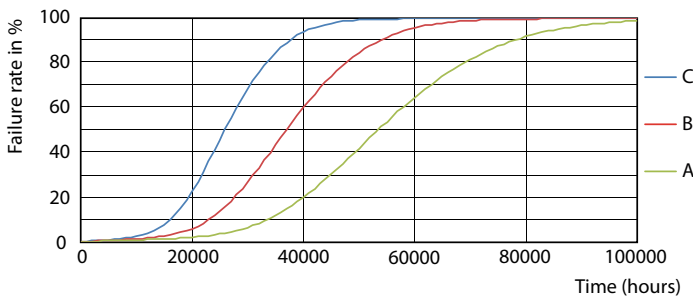


LEDtube 9,9W G13 840

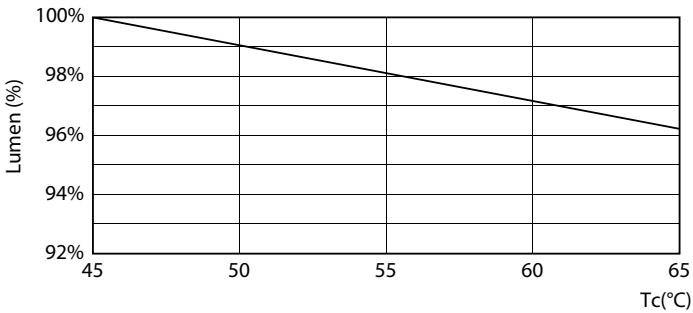
Lifetime



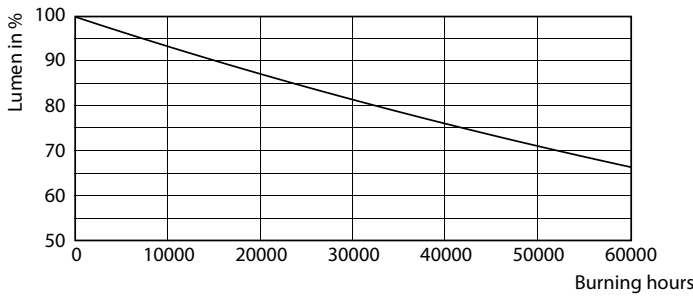
LEDtube 50K-LED



LEDtube 50K FailureRate-LED

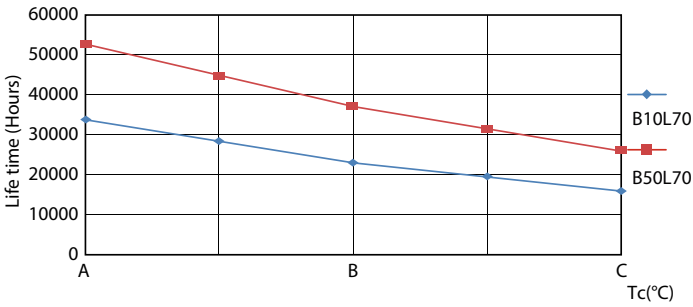


LEDtube 9,9W G13 LumenVsTc



LEDtube 50K-LMP

Lifetime



LEDtube 50K LifetimeVsTc-LED



FULL CUTOFF WALL PACK(MWP02)



DESCRIPTION

Available in two sizes, full cutoff wall pack is designed for perimeter illumination for safety, security and identity. Rugged cast-aluminum, corrosion-resistant housing with bronze polyester powder paint for lasting durability and long lifespan and secures the thermally conductive LED panel and electrical chamber 4 pcs-holes(top, bottom, and sides) make connection/disconnection safe and easy.



Medium Size 27W&45W&70W

Large Size 90W&135W

SPECIFICATION FEATURES

- Construction**
- Sealed die-casting profile for outdoor applications.
 - Casting thermally conducts LED heat to optimize performance and long life.
 - Suitable for applications requiring 3G testing prescribed by ANSI C136.31.
- Optics**
- Light engines are available in standard 4000 K and 5000 K (70 CRI) configurations.
 - Scalable Lumen Packages from 3,900 to 18,000 Lumens.
 - Tempered UV coated flat lens provide outstanding performance, uniformity and glare control.
- Electrical**
- Universal 120-277 or 347-480 VAC input voltage.
 - Greater than 0.9 power factor, less than 20% harmonic distortion, and is suitable for operation in -40°C to 45°C ambient environments.
- Lifespan**
- Estimated 50,000-hour LED lifespan based on IES LM-80 results and TM-21 calculations.
- Warranty**
- Five-year warranty.

PHOTOMETRICS

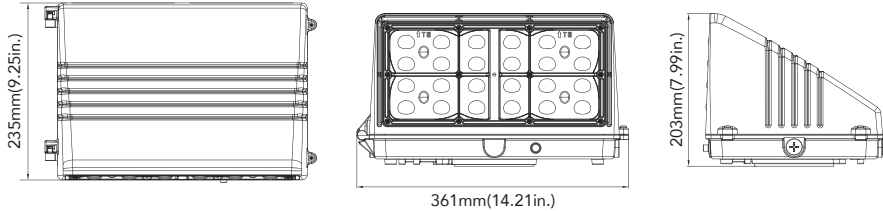
ACCESSORIES

Photocell
No. PC-JL-120-277V
USE: Photocell is field installed or pre-installed in factory by requesting

DIMENSIONS

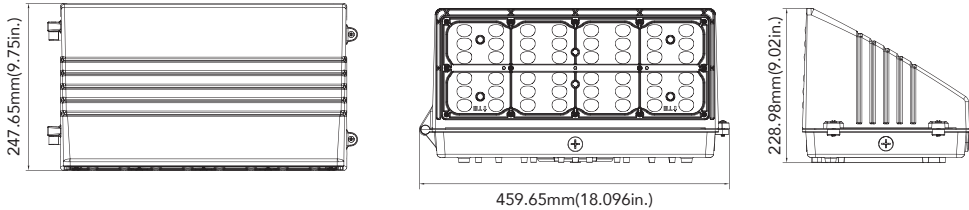
unit: mm/inch

Medium Size



Net Weight
27W: 5.774lb
45W: 5.983lb
70W: 6.164lb

Large Size



Net Weight
90W: 10.478lb
135W: 10.952lb

PERFORMANCE DATA

SYSTEM WATTS	VOLTAGE	CRI	LUMENS (4000K)	LPW (4000K)	LUMENS (5000K)	LPW (5000K)
27W	120-277VAC	70	3900lm	144 lm/W	3950lm	146 lm/W
45W	120-277VAC	70	6400lm	142 lm/W	6450lm	143 lm/W
	347-480VAC	70	6500lm	144 lm/W	6600lm	147 lm/W
70W	120-277VAC	70	9800lm	140 lm/W	9900lm	141 lm/W
	347-480VAC	70	9400lm	134 lm/W	9500lm	136 lm/W
90W	120-277VAC	70	12000lm	133 lm/W	12200lm	136 lm/W
	347-480VAC	70	12000lm	133 lm/W	12200lm	136 lm/W
135W	120-277VAC	70	18000lm	133 lm/W	18000lm	133 lm/W
	347-480VAC	70	18000lm	133 lm/W	18000lm	133 lm/W

ELECTRICAL DATA

Number Of Drivers	Driver Current (mA)	Nominal Power (W)	INPUT VOLTAGE (V)	CURRENT (Amps)
1	430	27	120	0.23
		27	208	0.13
		27	240	0.11
		27	277	0.10
1	770	45	120	0.38
		45	208	0.22
		45	240	0.19
		45	277	0.16
	1200	45	347	0.13
		45	480	0.09
1	1110	70	120	0.58
		70	208	0.34
		70	240	0.29
		70	277	0.25
	1850	70	347	0.20
		70	480	0.15
1	2270	90	120	0.75
		90	208	0.43
		90	240	0.38
		90	277	0.32
		90	347	0.26
		90	480	0.19
2	3260	135	120	1.13
		135	208	0.65
		135	240	0.56
		135	277	0.49
	3750	135	347	0.39
		135	480	0.28

ORDERING GUIDE

Example: MWP0245W27V40KDPO

Fixture Type	Wattage	Voltage	CCT	Finish	Sensor (Option)	Internal Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MWP02 Wall Pack Series	27 27W 45 40W 70 70W 90 90W 135 135W	27V 120-277V 48V 347-480V	40K 4000K 50K 5000K	D Dark Bronze B Black W White	P0 120-277V Photocell Blank without Photocell	Blank Alphanumeric

Note: 27W is limited to 120-277V input only.

DLC Model NO.

SYSTEM WATTS	VOLTAGE	CCT	DLC NO.	DLC Classification
27W	120-277V	4000K	MWP0227W27V40K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
		5000K	MWP0227W27V50K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
45W	120-277V	4000K	MWP0245W27V40K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
		5000K	MWP0245W27V50K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
	347-480V	4000K	MWP0245W48V40K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
		5000K	MWP0245W48V50K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
70W	120-277V	4000K	MWP0270W27V40K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
		5000K	MWP0270W27V50K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
	347-480V	4000K	MWP0270W48V40K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
		5000K	MWP0270W48V50K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
90W	120-277V	4000K	MWP0290W27V40K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Premium
		5000K	MWP0290W27V50K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Premium
	347-480V	4000K	MWP0290W48V40K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
		5000K	MWP0290W48V50K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
135W	120-277V	4000K	MWP02135W27V40K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
		5000K	MWP02135W27V50K[D,B,W][P0,Blank][A-Z,a-z,0-9,Blank]	Standard
	347-480V	4000K	MWP02135W48V40K[D,B,W][A-Z,a-z,0-9,Blank]	Premium
		5000K	MWP02135W48V50K[D,B,W][A-Z,a-z,0-9,Blank]	Premium

TS250 Internet-Enabled Thermostat with Integrated CO² Sensor

The Pelican Internet-Enabled Thermostat with an integrated CO² sensor provides commercial customers with virtual climate and air quality management. The TS250 delivers accurate temperature management, air quality (CO²) management, leading edge energy efficiency, built-in safeties and alarming, and fine tuned comfort. Coupled with the Pelican Web App, the TS250 tracks space temperature, CO² levels, and HVAC operational data in real-time and historically. All information is displayed in real-time online and is viewable on any Internet-connected device.

+ MESH WIRELESS NETWORK

The TS250 communicates wirelessly with a GW400 to reach the Internet. Each TS250 has built-in state-of-the-art wireless mesh network communication and repeating.

+ FAULT ALARMING

Built-in system and space analytics with automated email or text message alerts when a fault is detected.

+ WEB APP

Virtual and central management of TS250 available on all smart phones, tablets, and PCs. Directly manage thermostat temperature and CO² levels through a web browser. Designed for intuitive control over multiple thermostats.

+ HISTORICAL TREND DATA

Online viewable historical data of space temperature, setpoints, HVAC demand, CO² level, and fan demand.

+ INSTALLATION

Industry standard HVAC terminals utilize existing thermostat wire. Included with TS250 is Pelican's innovative limited wiring relay pack (WM500) used in applications where there are only three (3) wires to the HVAC unit.

+ SCHEDULING

Through the Pelican Web App you can schedule the TS250 thermostat for daily, 5-2, or 7-day schedules. Thermostats can also be scheduled as groups, for simple multi-thermostat management.

Designed and assembled in the USA
5-Year Limited Warranty



Specifications

POWER

Hardwire	24VAC, 60Hz; 50 mA
Voltage Range	23 - 30VAC
Relay Current	1.0A running

COMPATIBILITY

24VAC gas, electric, or oil heating systems.
Conventional and Heat Pump

WIRING

Conventional	R, RC, W, W2, Y, Y2, G, C
Heat Pump	R, RC, O/B, AUX, Y, Y2, G, C

SYSTEM PROTECTION

Four-Minute Compressor Short-Cycle Protection
Temporary Schedule Override
Auxiliary/Emergency Heat Efficiency Algorithm
Keypad Lockout
Trend Data Analytics and Fault Monitoring

THERMOSTAT RANGE

Operating Range	-20°F to 122°F
Differential Temperature	±0.5°F
Operating Humidity (%RH)	5 to 90% RH; non-condensing
Integrated Room CO ² Sensor	0 - 2000 PPM; +/- 50ppm accuracy
Storage Temperature	-20°F to 160°F

SIZE


Inch	H 3.5 x W 5.97 x D 1.5
mm	H 89 x W 150 x D 38
Horizontal Mounting	

Pelican Wireless Systems | 2655 Collier Canyon Road, Livermore CA 94551
(888) 512-0490 | sales@pelicanwireless.com

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PRODUCT SPECIFICATIONS

Feature	 LRP16HP Packaged Heat Pump
Rating	★★★★☆ (4.5)
Heating Energy Efficiency	8.20 HSPF
Cooling Energy Efficiency	16.00 SEER
Reliable Scroll Compressor	✓
Efficient Condenser	✓
Cabinet	Durable Cabinet; Louver Panel
Electronic Ignition	✓
Heat Exchanger	20-Year Limited Warranty

Exchanger Warranty	
Compressor Parts Warranty	10-year limited warranty on the compressor and a 5-year limited warranty on remaining covered components. Covered components may be eligible to receive a 10-year limited warranty with online registration.
Tax Credit Eligible	✓

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Redwood Coast Energy Watch Energy Assessment Report



Redwood Coast Montessori

793 K St, Arcata

Assessment Date: October 6, 2021

Prepared by

Patricia Terry, CEM

pterry@redwoodenergy.org

PH: 707-269-1700 Ext 317

Cell: 707-382-2098

Fax: 707-269-1777

Redwood Coast Energy Authority

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EXECUTIVE SUMMARY

Redwood Coast Montessori is a charter school with sites in Manila and Arcata, California. The Arcata site was audited by the Redwood Coast Energy Authority's Energy Watch (RCEW) in October 2021 for energy efficiency opportunities as well as participation in the California Energy Commission's (CEC) CalSHAPE program for HVAC Assessments. This assessment report examines the energy usage at the site and recommends actions for reducing, shifting, or offsetting energy usage and the benefits of these actions. The report also includes energy saving actions, repairs and referrals to programs and services that may be available for the facility.

Your interests were combined with the findings of your assessment to make this a customized report with specific recommendations for your site. The following recommended upgrades or actions were determined to provide the most significant benefits for your site for one or more of the following reasons: they are expected to provide the most substantial energy savings for your site; they align with your identified interests; they have limited time incentives available; they are available for financing; and/or they are items that should be addressed immediately due to safety concerns.

Most significant upgrades and actions:

- **Upgrade interior fluorescent lighting with linear LED lamps**
- **Replace exterior wall mount fixtures with new LED fixtures**
- **Have ventilation and HVAC system assessed under CalSHAPE program**
- **Set up Benchmarking on Energy Star's Portfolio Manager**
- **Electrification of HVAC system**
- **Electrification of Hot Water Heater**

This assessment report is provided with no obligation to pay for goods or services. The purpose of this report is to recommend energy saving and emission reducing actions based on customer's existing technologies and associated use. Feasibility, design, and cost estimates of recommendations must be verified by customer or customer's installing contractor. Savings and cost estimates provided by the RCEW Program are based on statewide averages and are not intended to be accurate for a customer's specific site.

Please note that the Redwood Coast Energy Watch program does not provide incentives for technology upgrades. The availability, eligibility and amount of incentives for technology upgrades will be determined by the implementing program that you choose to work with. We encourage you to seriously consider the recommendations contained within this report and to take action soon as program incentives may change. Do not hesitate to give us a call if you have questions or need an explanation about anything presented throughout the report.

GENERAL SITE INFORMATION

Redwood Coast Montessori is a charter school which a location in the city of Arcata which resides in Humboldt County, California. Arcata is in PG&E Climate Zone 1, which means the site likely has primarily heating and very little cooling required. The site consists of 1 main building dating approximately 10,526 square feet. The building is normally occupied during school hours, Monday to Friday, 8am to 3pm. Details on your existing equipment can be found in Appendix A of this report.

The following table summarizes the energy use at this site:

PG&E Electric Rate:	HB1
PG&E Natural Gas Rate:	GNR1
Annual Electric Use (kWh/yr):	26,651
Annual Nat. Gas Use (Therms):	1,076
Peak Demand (kW)	Unknown
Average Cost/kWh	\$0.26
Average Cost/Therm	\$1.81
Demand Charges on Account	None
Energy Use Intensity (kBtu/sq. ft/yr)	18.86
Typical Energy Use Intensity for Your Building Type	45.02
Estimated GHG Emissions (metric tons of CO2)	8.18

Table 1. Energy use summary of facility

ENERGY USE INTENSITY

A building's Energy Use Intensity (EUI) is a measure of how much energy in kBtUs is used per square foot. The EUI is a standard metric used to compare the energy use of a facility to those of similar size and purpose and is calculated by converting the annual electricity and natural gas usage of a facility to a common metric (BTU) and dividing this by the gross square footage of the site. Data for this report is based on similar building types in PG&E territory. The estimated EUI of your facility is 18.86 which is lower than an average school facility which has an average EUI of 45.02. In part, this can be due to a milder coastal climate with no cooling load.

You can continue to track your energy usage and EUI using Energy Star's Portfolio Manager tool at <https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio manager>

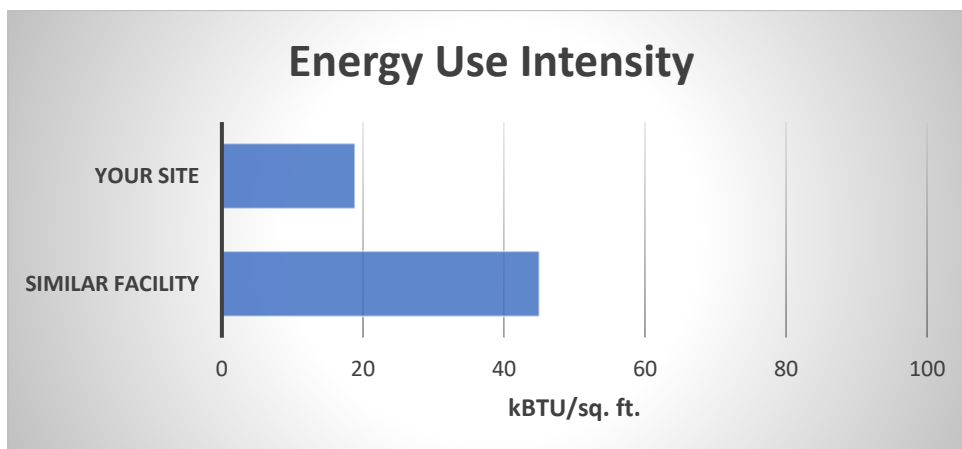


Figure 1. Site EUI compared to a similar building type in PG&E territory

SITE ENERGY USAGE

The chart below shows a comparison of gas and electricity usage across one year using a common unit of MMBtu. It can be observed that the energy usage of the facility through natural gas far exceeds the electricity usage during the heating season, demonstrating that space heating dominates as the highest energy user in the winter. Since this facility just finished renovation and went into operations during 2021, the data from the earlier parts of the year are less relevant.

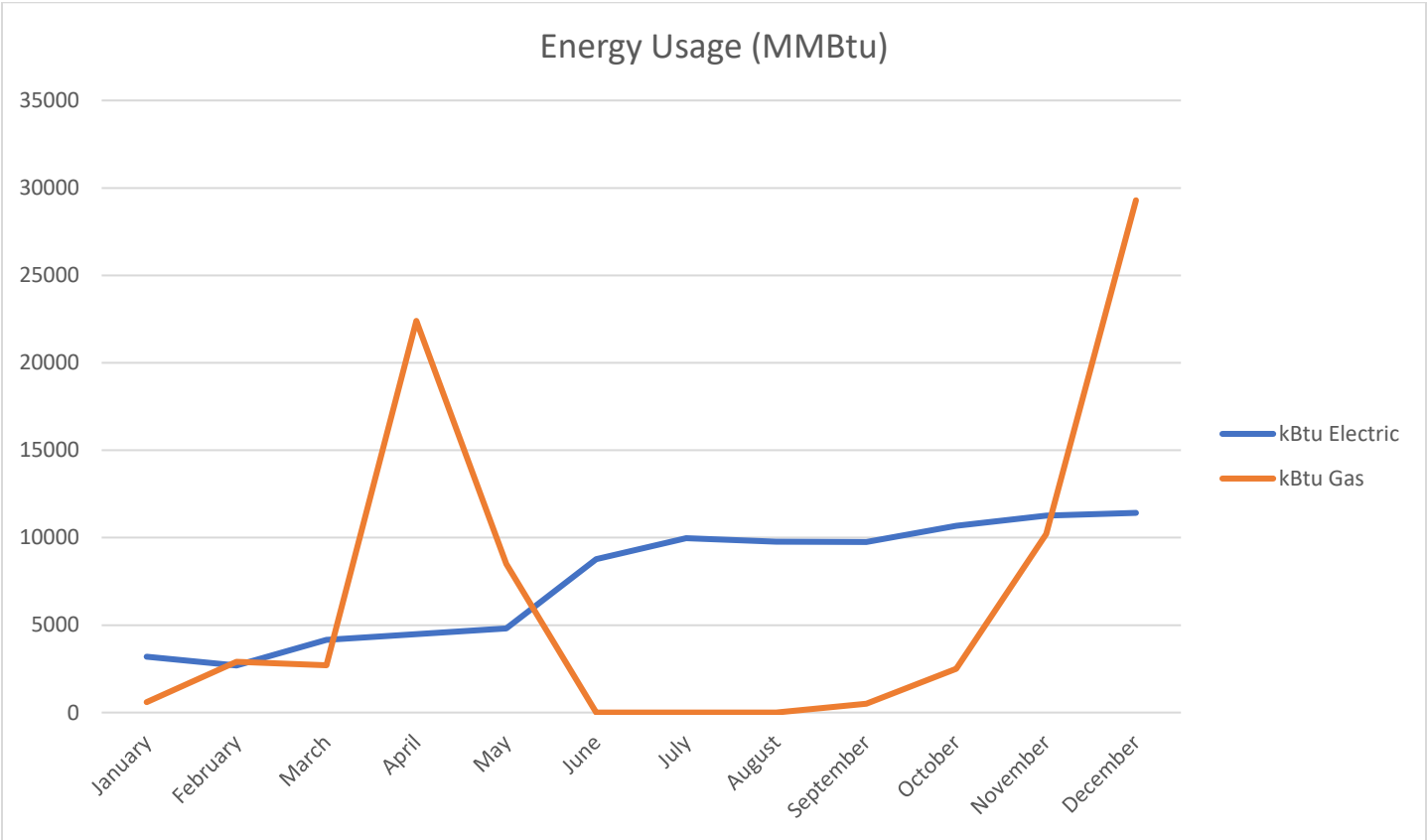


Figure 2. Electricity and gas usage for one year (MBtu)

The charts below shows the facility’s monthly electricity and gas usage and costs for the previous 12 months. Since generally schools have decreased summer usage when rates are high, the costs do not increase substantially in the summer as they do for some customers.

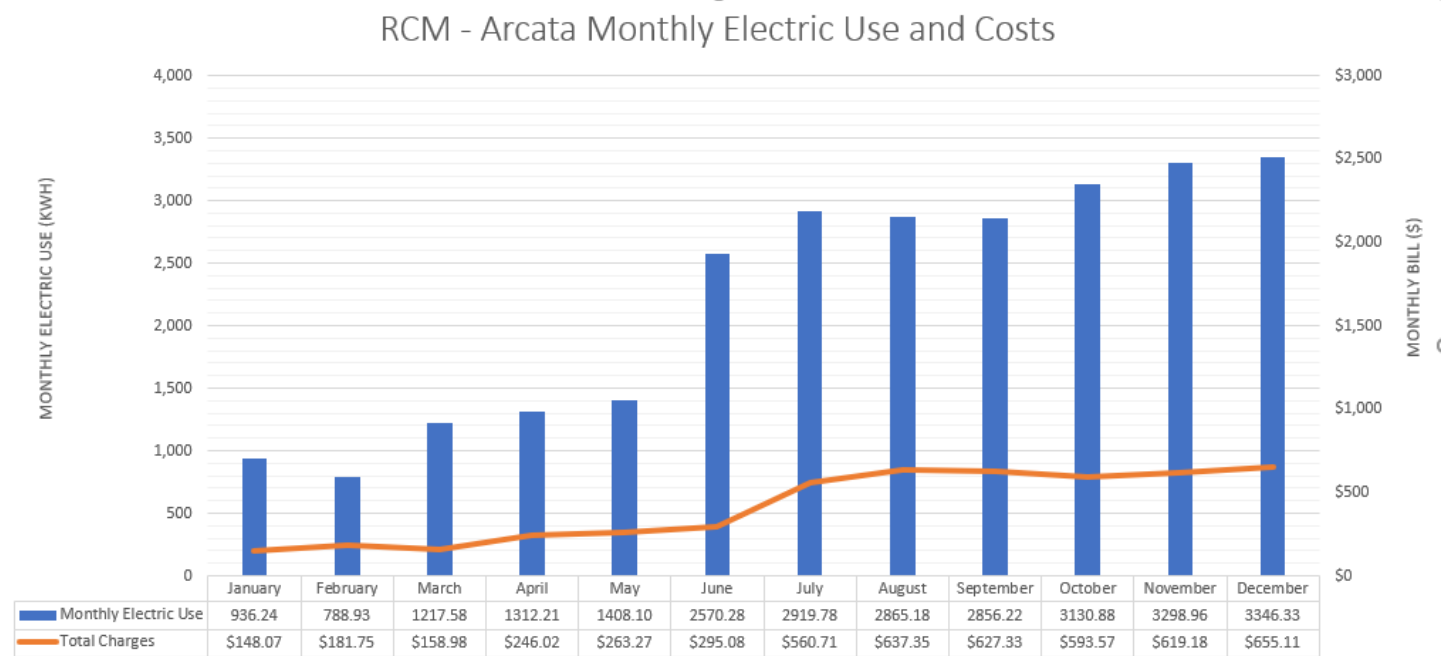


Figure 3 Electricity usage and costs over one year.

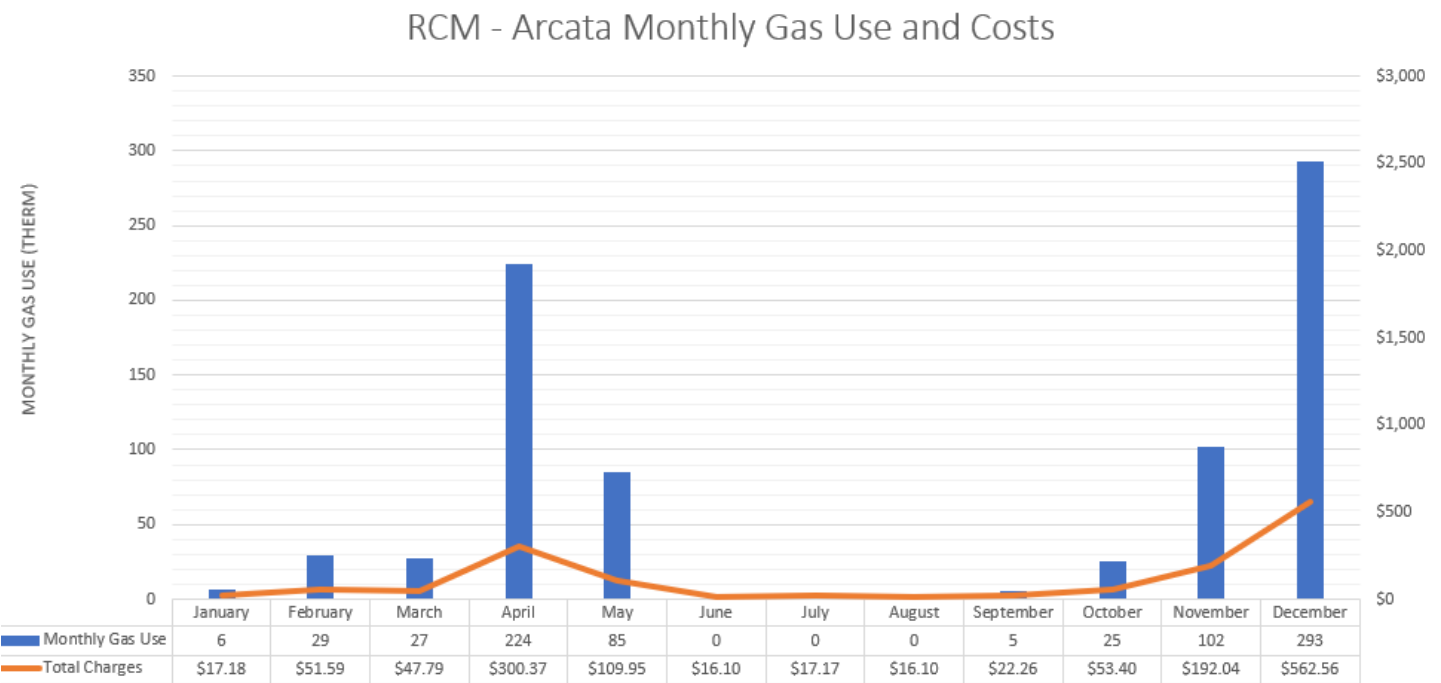


Figure 4 Natural Gas usage and costs over one year.

ENERGY END USE

Lighting at this site, and at most California schools, is the largest end user of electricity according to the California Energy Commission's Commercial End Use Survey (CEUS). This facility is located in a mild coastal climate (Climate Zone 1) and air conditioning is minimally used compared to the rest of the state. Electricity use from HVAC is likely dominated by ventilation fans in the package units. Refrigeration is likely not a large end use of electricity at the RCM site.

Natural gas use on site is largely for space heating and water heating, as shown in the typical end uses of California schools.

The recommended measures for this site are based on the largest end users for energy at this site: Lighting and HVAC.

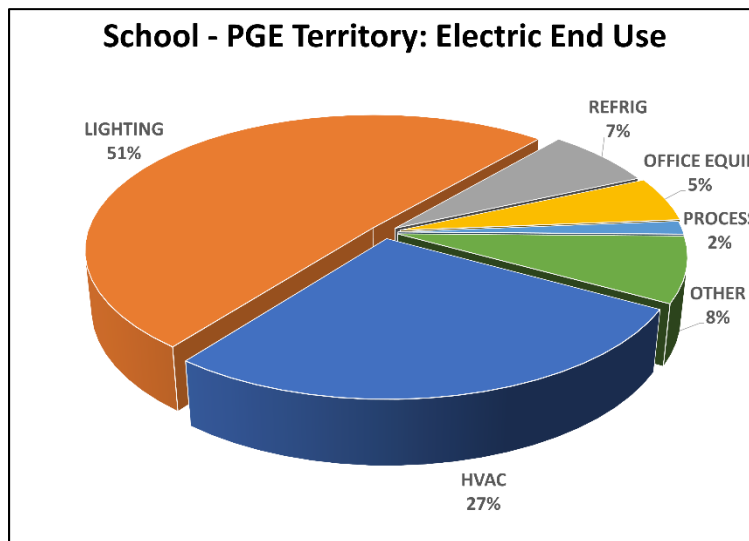


Figure 5 Typical end use of electricity in California schools. Data is based on the average energy use of similar building types in PG&E territory and may not be an accurate representation of the electric end use of your site. Source: Itron CEUS 2006

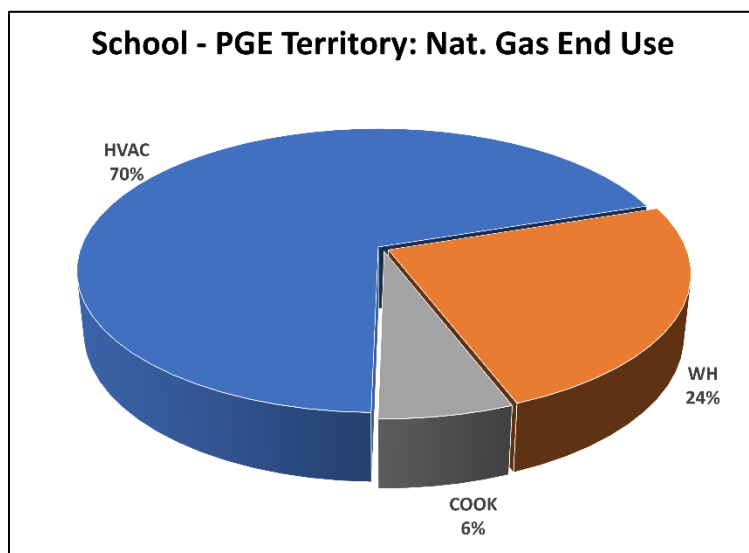


Figure 6 Typical end use of natural gas in California schools. Data is based on the average energy use of similar building types in PG&E territory and may not be an accurate representation of the natural gas end use of your site. Source: Itron CEUS 2006

GREENHOUSE GAS EMISSIONS

The time of day the facility uses energy has a large impact on the amount of greenhouse gas (GHG) emissions associated with that use of energy. During peak hours, between 4pm – 9pm and during peak day events the state’s electricity grid requires the use of additional fossil fueled power plants. During the middle of the day when solar panels are producing the most energy the state’s electrical grid has significantly lower emissions.

Additional information and real time data on California’s GHG emissions can be found at <http://www.caiso.com/TodaysOutlook/Pages/emissions.html>

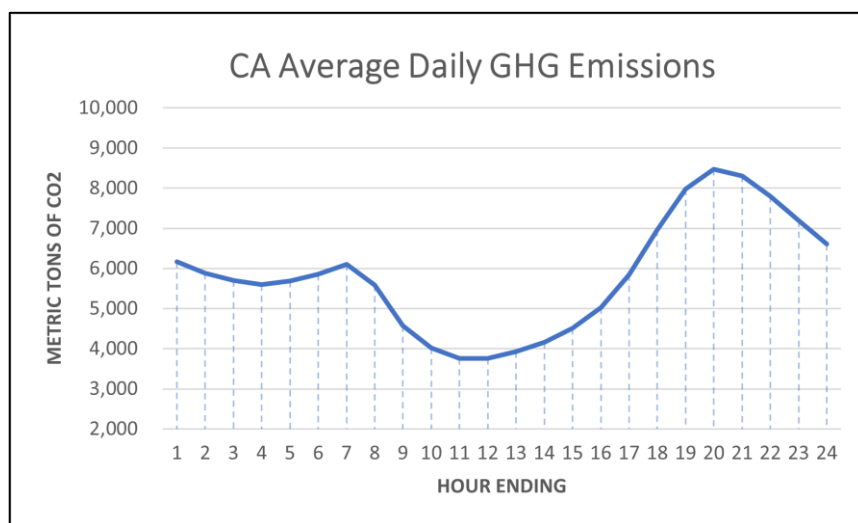


Figure 7 Traditional daily trend of CO2 emissions as solar and wind resources are reduced during peak hours. This graph is based on emission data for 2020.

Your facility and most schools have most of the energy use between 8am and 3pm, meaning energy use is already reduced during the peak hours when costs and GHGs are highest. Based on the load profile above, the facility has a baseline usage of about 2.0 -2.5kW. Since the building has exterior lighting, it’s likely that makes up most of the baseline. Upgrading to LED should lead to a drop in that baseline by 50-70%.

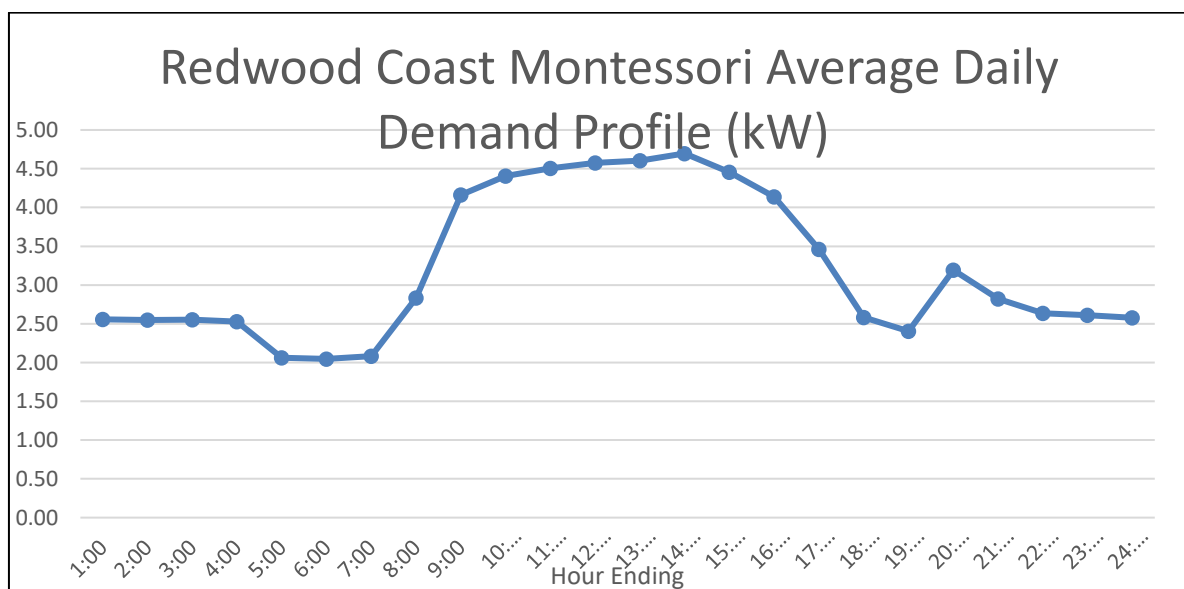


Figure 8 Average daily electric demand at your facility.

UTILITY RATES AND PEAK LOADS

Shifting some of your electricity use outside of peak hours not only saves money on your electricity bill, but will also reduce GHG emissions. Your facility is on a time-of-use rate which means the charges will depend on the time of the day and time of year that electricity is used. The chart below shows the different rate periods for PG&E rate plans.

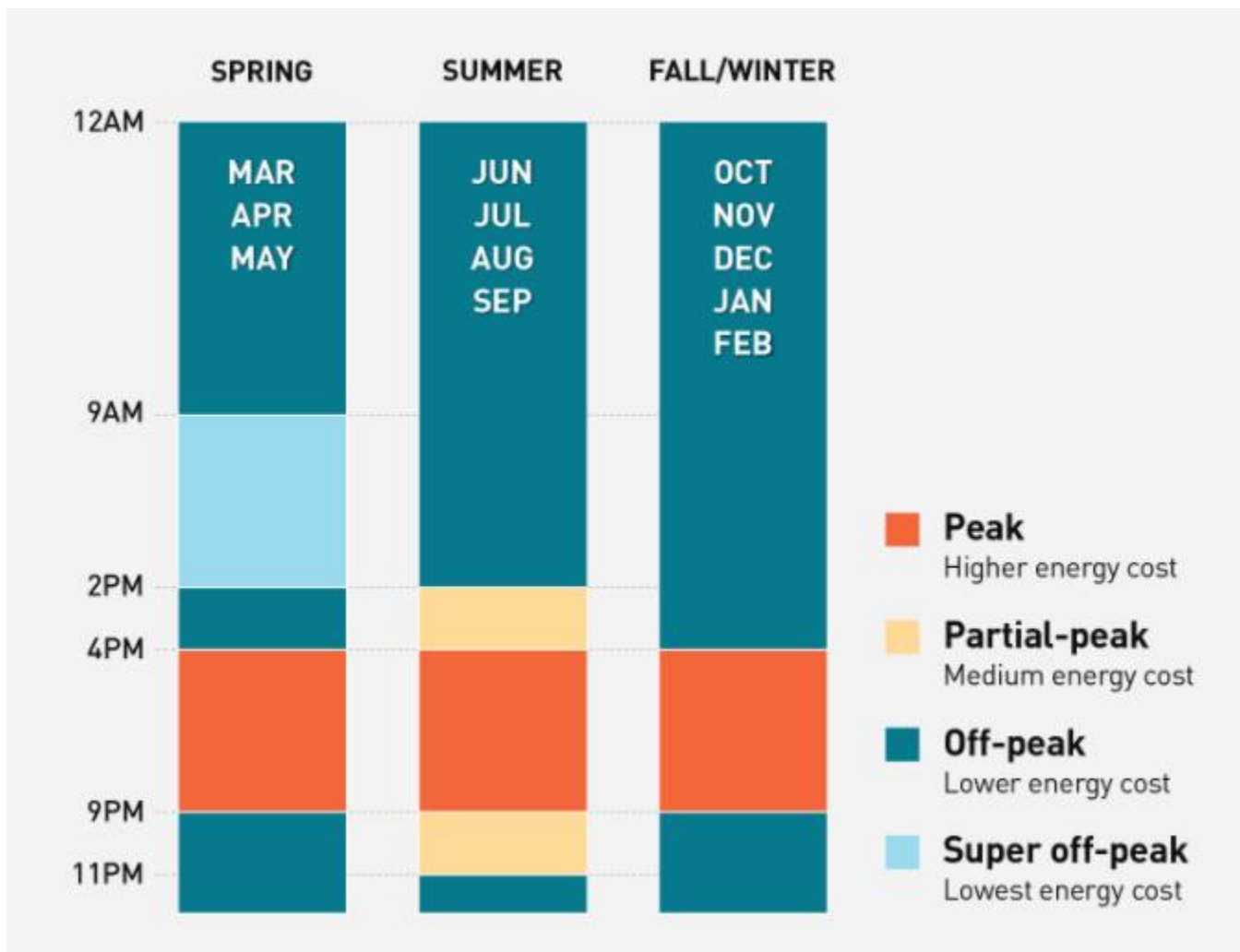


Figure 4. Rate periods for PG&E time-of-use rates. Source: PG&E website

Here are some recommendations:

- Become familiar with the recent changes to the Time-Of-Use (TOU) rates. https://www.pge.com/en_US/small-medium-business/your-account/rates-and-rate-options/time-of-use-rates.page?
 - Electricity usage will now cost more in the afternoon and evening hours between 4pm and 9pm. Shifting electricity intensive operations to off-peak hours earlier in the day may lead to savings and will reduce GHG emissions.
- Get a rate analysis. You may be able to save money by switching to a different rate.
- Participate in a demand response program. These programs offer you a lower rate in exchange for reducing your energy usage during certain “event” periods. You will be notified in advance of the events so you can adjust operations. There are also options for automating this.

MEASURE DESCRIPTIONS

The recommended upgrade measures at the site are shown in the table below. These measures were selected based on the highest end users of energy, age, and efficiency of equipment, and finally cost effectiveness. Your measure recommendations address your lighting, HVAC, water heating, and kitchen equipment. Financing and incentives may be available for many of these measures, contact the implementing program that you have chosen to work with to learn more.

Measure Number	Measure Description
L-1	Lighting - Exterior Fixture Retrofit
L-2	Lighting- Interior Fixture Retrofit
L-3	Lighting Controls
H-1	Demand Controlled Ventilation/CO2 Sensors
H-2	HVAC Electrification
H-3	Smart Thermostats
K-1	Hot Water Heater Electrification
K-2	Kitchen Appliance Efficiency/Electrification
P-1	Smart power strips

Table 2 Recommended upgrade measures for your facility.

M-1: Lighting - Exterior Fixture Retrofit

Upgrade your exterior wall mount fixtures – your existing fixtures use high intensity discharge (HID) lamps. Upgrade to integrated LED fixtures which can use 50% to 70% less energy and last up to 15 years. This will help you save money on your utility bills as well as reduce maintenance costs.

M-2: Lighting - Interior Fixture Retrofit

Replace fluorescent tubular lamps with linear LED lamps. Ensure that your fixture ballasts will be compatible with the LED linear lamps or replace your ballasts with LED drivers. Re-lamping with LED lamps can provide savings of up to 65% over the existing T8 fluorescent lamps and can last up to 15 years. This will help you save money on your utility bills as well as reduce maintenance costs.

H-1: HVAC Controls – Demand Controlled Ventilation

This measure should be refined after the HVAC assessment through the CalSHAPE program. Through the program, each classroom will be fitted with a carbon dioxide sensor. The sensor can be used to determine if there is more fresh air needed in the classroom. Demand Controlled Ventilation (DCV) can work with the sensor to turn on the ventilation system to add more fresh air when carbon dioxide levels are high. When they are low, for example, when the room is vacant, the ventilation system can be turned off, saving energy.

H-2: HVAC - Electrification

Heating and ventilation for the building is provided by rooftop packaged units that combine a natural gas heater and air conditioning. The area by the kitchen also has a natural gas residential style furnace for heating. Burning natural gas produces greenhouse gases and for furnaces that are in the interior can also introduce toxic gases into the building. Electrification of HVAC units will move toward eliminating gas burning appliances at this site. Using electricity for heat also means that the energy could be generated on or off site from renewable sources.

H-3: HVAC – Smart Thermostats

Install a smart programmable thermostat to save energy by reducing the temperature in your building during times when it is not needed. Set thermostat temperature to 68°F for occupied heating and 55°F for unoccupied. Include pre-heating time to your programming schedule to ensure that the temperature will be at a comfortable level when needed. Smart programmable thermostats also have with Wi-Fi features for additional remote-control capabilities. Heating can be turned down or off using a smart phone app and usage can be monitored over time.

K-1: Hot Water Heater Electrification

The gas storage hot water heater could also be replacing with a heat pump water heater. A heat pump water heater uses electricity to heat the hot water but is much more efficient than a standard electric resistance water heater. Smart controls can also be installed on a heat pump water heater to allow for more ability to control the unit to save energy when not in use. Any exposed hot water pipes should be insulated.

M-8: Kitchen – High Efficiency Appliances

Replacing a working appliance for energy savings may not be cost effective, but when the units are reaching end of life they can be replaced with an Energy Star rated appliance. For the electric resistance range and oven, a high efficiency unit with an induction range can be purchased to save energy over the existing range. Based on the model, the refrigerator could be approaching end of life and new refrigerators are more efficiency. This should be the first appliance for replacement.

P-1: Kitchen – Smart Power Strips

Since there are computers and other plug-in loads used at this facility, consider the use of smart strips. Smart strips can be equipped with occupancy sensors to turn of equipment when it is not in use. Smart strips can also control and monitor the energy use of the loads remotely on a smart phone app.

ENERGY ACTIONS

Recommended immediate actions to be taken at the site are described in each technology type below. These actions might not directly lead to energy savings but may reduce GHG emissions, increase the lifespan of your equipment, address health and safety concerns and/or reduce energy costs.

Water Heating

- **Lower water heater temp to 120°F** - Lower your water heater setting to achieve a temperature of 120° F at the furthest faucet.
- **Flush water heater tank** - Flush your water heater tank or on-demand heat exchanger at least once per year to reduce mineral and sediment buildup. Mineral and sediment buildup decrease the efficiency of your water heater. See your owner's manual for flushing instructions.

HVAC/ Space Heating

- **Replace or clean your furnace filters.** This will be completed through the CalSHAPE program, including replacement of filters with MERV-13 filters.

Energy Tracking/Audit

- **Schedule a building envelope assessment.** Consider having a more in-depth energy audit from a Building Performance professional who understands how your whole building works as a system. A professional energy auditor will use specialty tools such as a blower door and thermal imaging camera to pinpoint energy inefficiencies and causes of discomfort. They will work with you to determine the most cost effective retrofits.
- **Benchmark your facility.** RCEA can assist getting your facilities energy use loaded into the Energy Star Portfolio Manager benchmarking tool. This tool allows you to look at your energy use now and over time. The tool can also compare your usage to other similar buildings.

- **Have your building Energy Star Certified.** Once your information is in the Energy Star Portfolio Manager, you will be assigned a score based on the energy usage of your building. A high score could mean your building qualifies for Energy Star Certification. Contact RCEA to find out about completing this certification.

NEXT STEPS

Your RCEA Energy Technician is here to support moving your project forward with any of the following program implementers. Once authorized, your Energy Technician will share all relevant project information with the programs of your choice and perform an initial project hand off. Please let us know which programs you are interested in working with.

☐  **REDWOOD COAST
EnergyAuthority** **Redwood Coast Energy Authority (RCEA)**
www.redwoodenergy.org
(707) 269 -1700

RCEA's Direct Install program can help you qualify for rebates for upgrading your lighting, HVAC and refrigeration systems.

☐  **WILLDAN** **Willdan**
www.willdan.com
(800) 424 - 9144

Willdan's GK12 Program can help you qualify for rebates and financing for upgrading your lighting and refrigeration controls. Willdan can also help with heat pump water heater upgrades.

FINANCING & ADDITIONAL RESOURCES

☐  **Go Green Financing**
www.gogreenfinancing.com

GoGreen Financing offers loans for energy efficiency improvements for small business property owners and tenants.

☐  ***Pacific Gas and
Electric Company®*** **PG&E On-Bill Financing**
www.pge.com

PG&E offers 0% interest loans for qualifying projects. This financing can be accessed through Willdan's GK12 Program.

APPENDIX A: EXISTING EQUIPMENT

Water Heating

Location	Make and Model	Qty	System Type	Efficiency	Fuel Type	Capacity	Pipe Wrap Installed?
Utility Closet	State Industries PR630NORT2	1	storage	standard	Natural gas	59 gallons	No

HVAC / Space Heating and Cooling

Location	Make and Model	Qty	System Type	Efficiency	Capacity	Fuel Type	Ducted System?
Roof	Lennox GCS16-048-120-4P	6	Package unit	80% AFUE (standard)	120,000 Btuh	Natural gas/electric	yes
Utility Closet	Lennox G50UH-48B-090-02	3	Room air condition	80% AFUE (standard)	88,000 Btuh	Natural gas	Yes

Lighting – Interior

Existing Fixture	Fixture Qty	Fixture Condition
4-lamp 32 watt 4' T8 fluorescent strip fixture	125	good

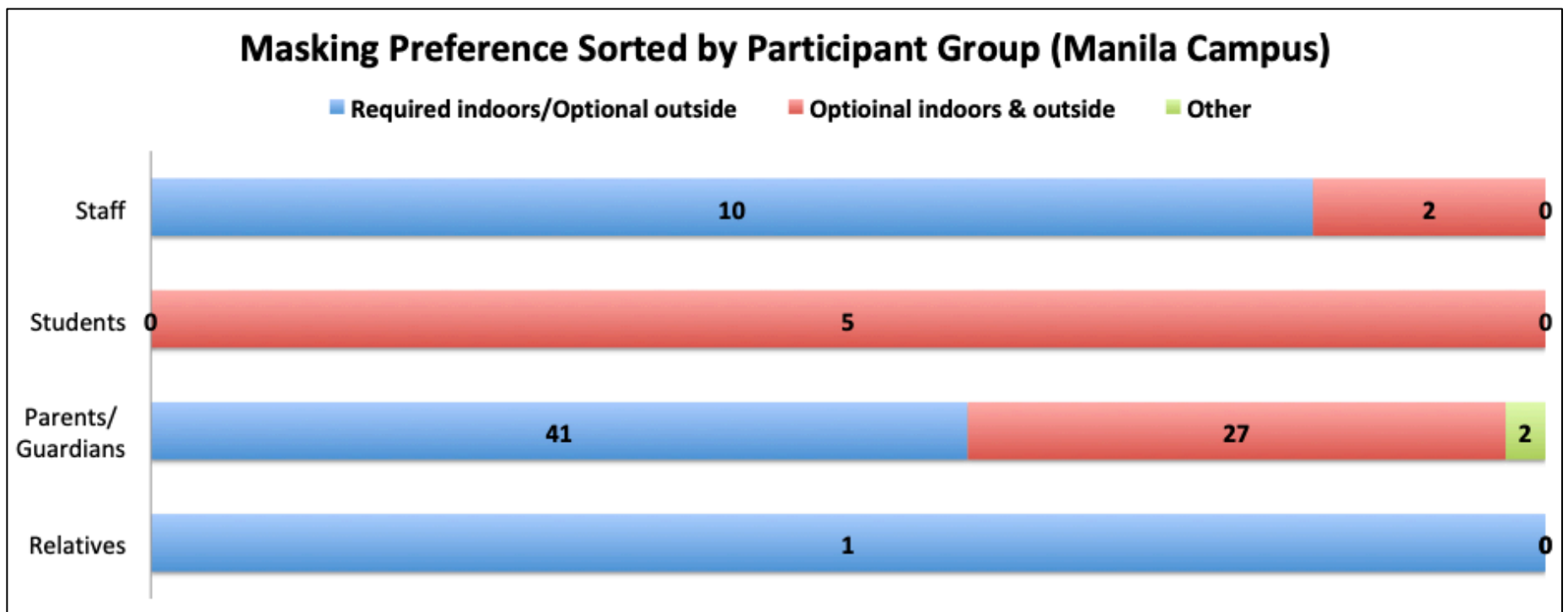
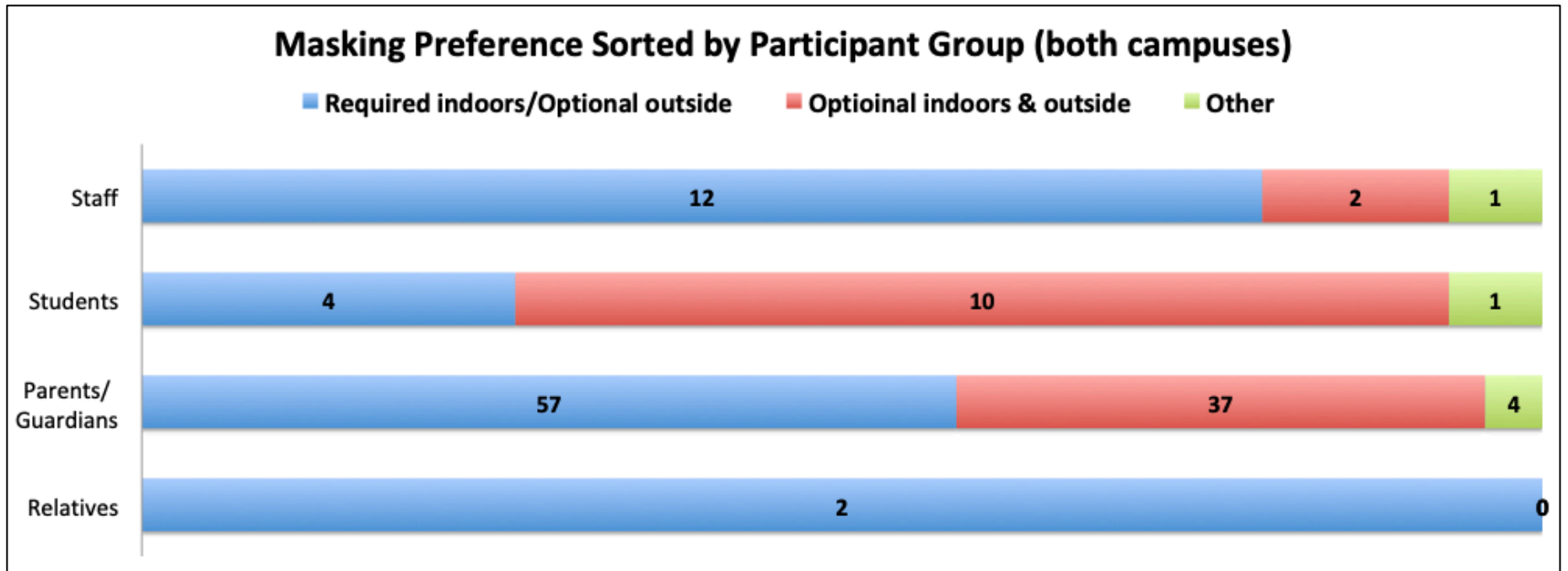
Lighting – Exterior

Existing Fixture	Fixture Qty	
250-watt Metal Halide wall pack	2	good
70-watt Metal Halide wall pack	10	good

Kitchen Equipment

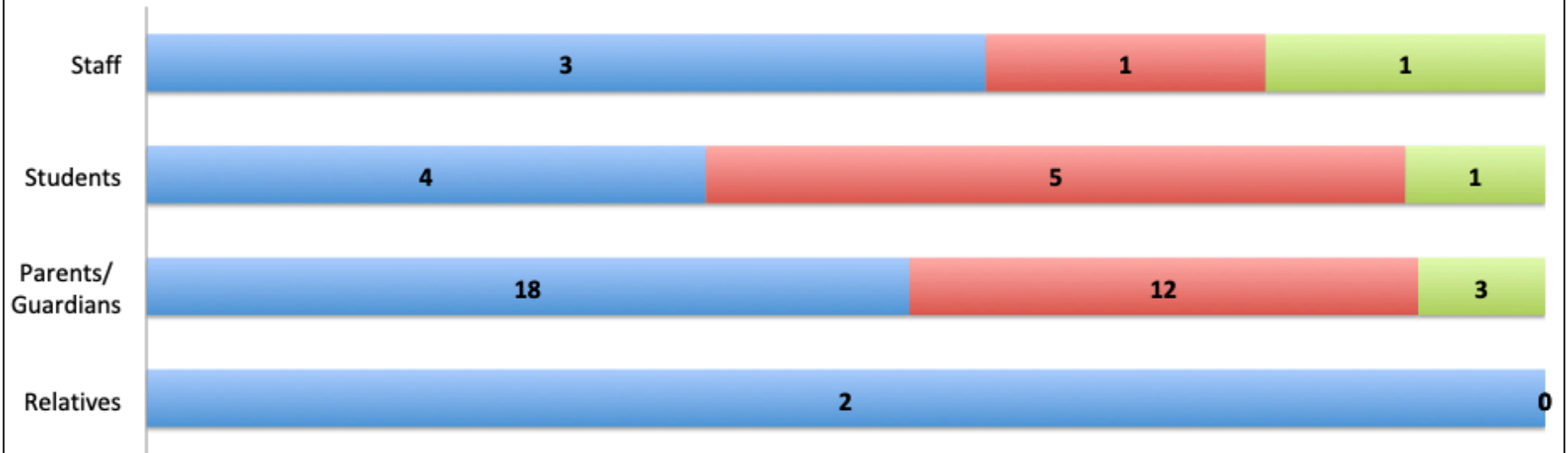
Equipment	Make and Model	Qty	Efficiency	Fuel Type
Residential style electric range and oven	Unknown	1	Standard electric Resistance	Electric
Residential style dishwasher	Maytag MOB7100AWS	1	High Efficiency	Electric
Residential Style Refrigerator	Amana ARB2107	1	Standard	Electric

2nd Masking Survey Results



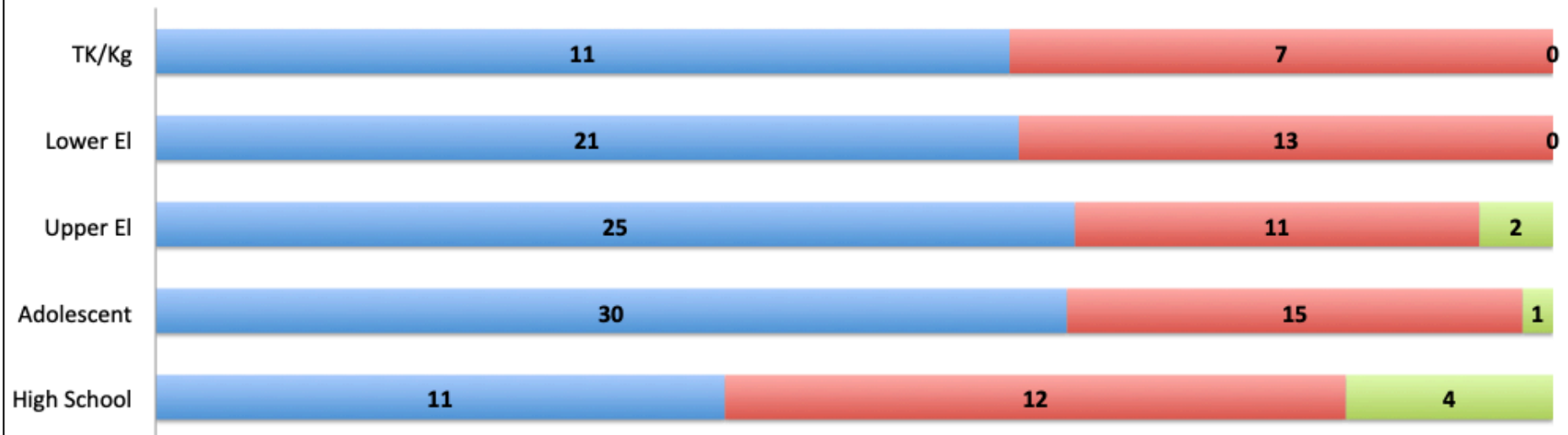
Masking Preference Sorted by Participant Group (Arcata Campus)

■ Required indoors/Optional outside ■ Optioinal indoors & outside ■ Other



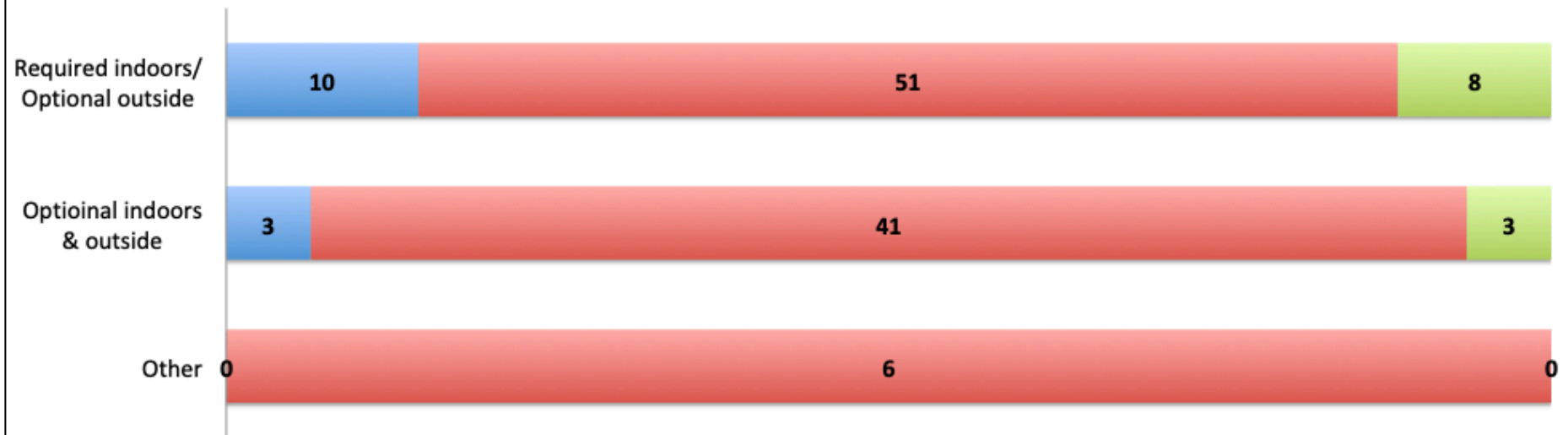
Masking Preference Sorted by Age Group (both campuses & all participants)

■ Required indoors/Optional outside ■ Optioinal indoors & outside ■ Other



Will Masking Policy Affect Enrollment?

■ Yes ■ No ■ Maybe



Comments
We just had a positive case in my classroom that spread to another child after a maskless playdate. Coincidence, maybe... So far, no other children have tested positive.
We only have a few weeks left, I think we should leave the policy until the end of the year.
If you don't remove the masking policy we will no longer have our child attend RCM.
I will forward a separate email with my thoughts on the matter.
The pandemic isn't over, but the school year nearly is - I really encourage RCM to hang in there with its current policy for another 5-6 weeks and then you can reassess things this summer in regard to what is the best approach for next year.
Itâ€™s working good right now donâ€™t mess with it. Not sure what the problem is!
Better to be safe than sorry
my children are all fully vaccinated
Very contagious
I am a parent and staff member. I support what was communicated by board members last meeting. I would hate to see our end of year events disrupted by an outbreak. There are only 8 more weeks. It's not too long to wait considering how far we've come.
Thank you for all your hard work!
Other local schools that made indoor masking optional have had cases recently. We have also had cases in our own classes last week that may have spread much more if we had not been masking indoors. We are so close to the end of the school year, I think all the students and staff can successfully continue to wear masks indoors for the remainder of the year. While it would be more comfortable to not wear a mask indoors, it's really not that big a deal for us at this time.
I am very unhappy about the current mask policy. I strongly believe that at this point, it is harming the children. The science is clear about the efficacy of cloth masks (which most of the kids wear). They don't work over longer periods of time, such as a school day. Weekly testing makes more sense scientifically and would be less harmful.
The number are going back up. I have many friends sick with Covid in the last two weeks. This is not over. Trillium school had a major outbreak last week.
A few weeks ago I probably would have been fine with no masking indoors but based on what my wife has been experiencing in her high school special Ed class with a lot of kids and aids out sick (aides and kids that weren't masking) I would say let's just keep the indoor masking policy. Masks work!
I know eight local people who have contracted covid in the past two weeks. All of them were fully vaccinated and recovered quickly, but many of our families have vulnerable members. It seems prudent to continue safety measures these last few weeks of school. That said, I trust the RCM Board to evaluate the situation and choose the solution that is best for the school community as a whole.
Please do not unmask indoors. People are still catching and even doing from COVID
I'm sure my son will continue masking, he's more comfortable doing it.
We need to consider all the high-risk families. We consider food allergies in the classroom. Plus, these kids are together ALL DAY doing projects. Research demonstrates length of exposure matters. Infection rates in the County have also been quite high
As a parent it is primarily important to me that the RCM staff are comfortable with the masking policy. Thank you!
If masking indoors is allowed, weâ€™d like regular Covid testing to be part of the plan.
I am a local public school teacher and currently 3/4 of my class is out sick with confirmed Covid or suspected Covid. The only people in my room not sick are those of us who have been masking. Masks work! I canâ€™t afford to miss a week or more if work and donâ€™t want my child missing a week or more if school. Not to mention the risk of king Covid complications. Please keep the mask policy in place! I have 1st hand experience of what will happen once the masks are dropped.
Lets check temperatures everyday instead!

Students have already lost so much in person instruction over the past two years, I would hate to see us have an unnecessary spike in infections and kids out again right before the end of the year by unmasking now. Masks work.
No real preference for what the mandate will end up looking like.
I think indoor masking is wise for the remainder of the semester.
We currently have several cases that have popped up in the last week.
Local cases are on the rise again making it difficult for me to be ok sending them to school as it is. If masks stop being required indoors I won't be able to send them to school.
We are so close to the end of the school year and there is a lot to do to wrap up the year and prepare for various events. Making masking optional at this point will likely increase student absences and potentially staff absences as well if/when folks become exposed or sick. Let's just keep things as they are so we have the most folks possible able to finish out the year healthy.
Thank you for all of your thoughtful decision making on this difficult topic. I so appreciate you leaning on the side of safety for my kids and their classmates.
There are only 6 more weeks of school, I think we can roll with masks a little longer. We just had a positive case in my child's class this week and case numbers are rising. It seems silly to quit masks now.
After having lost her grandmother to Covid in the fall, my daughter has been very dedicated in her efforts to mask and keep the community safe. I feel, with positive cases in her very class this week, it would be a disservice to her and other kids efforts not to stay the course until the very soon ending of the school year. Iâ€™d also feel putting a strong weight to student votes as they are most impacted would also be prudent.
I like the current policy, and with it being so close to the end of the year, it makes sense to finish out the year and see where things are at in August.
I feel it's time for the children to see their peers smile and facial expressions all the time
Stop forcing our children to wear masks on their face!!
Thank you for asking for updated input! Our extended family has been doing the right things. We are all vaccinated and boosted. We test if symptoms appear. At this point in the pandemic, positive cases are causing less severer illness and significantly lower hospitalizations and deaths than when we were shut down. I trust our community to remain vigilant, to do the right things: report illness and/or positive test results and follow protocols. I trust our board to make future changes as needed. I believe children are adaptable. If adults make changes successfully and calmly, children will follow suit. If the board votes for optional now and needs to switch back, students will be able to do it.
RCM protocols have kept our students healthy and in the classroom. Other schools that I am familiar with have had more COVID spread that has impacted attendance and instructional time.
I think masks inside are a good and appropriate public health measure- not hard to do, reduces chance of spread and disease. We donâ€™t know who at school or in student families may be immune compromised or otherwise especially vulnerable. Itâ€™s a good Montessori lesson about caring for the whole community and making reasonable efforts we can to help each other.
I like wearing a mask because it helps me keep others safe and I'd appreciate it if people gave me the same courtesy.

It is my hopes that you will lift the mandated mask policy. I strongly feel that the kids should not be mandated to wear a masks indoors. I have seen first hand how masks impede speech and language development. In addition, there are other illnesses that kids are more effected by than COVID. All of my kids have had it and their symptoms where not worse that the common cold. I know this is not true for everyone, but why are we keeping our kids masked in order to possibly protect the adults when adults are not even wearing masks now in most venues? I donâ€™t believe masks are that effective anyways. There will always be some virus or bug, but we canâ€™t keep masking our kids. One of the reasons why we chose to send our daughter to RCM was because it was not in the Eureka City Schools and we believed that RCM would keep more of an open mind about such issues. We would like to send our youngest to RCM, but under these circumstances and the problems we have seen with her and her impaired speech development due to masks, we are reconsidering. Luckily her school has lifted the masks mandates. If parents choose to have their kids in masks that is fine, but let the other parents and students have the option to be mask free.

In light of all the recent exposures in schools the past few weeks, I think masking indoors is still the safest option. As much as I want the benefits of learning and socializing without masks, I still feel strongly that masking is safer.

If cases were going down, I'd say optional for both indoor and outdoors...but cases seem to be on the rise, so I'm happy the masks are still in play. Only a few weeks left anyway.

While I believe case count numbers are important, we also need to be looking at deaths and hospitalizations as well- these numbers are very low, thankfully.

please encourage mask-free interactions

I would like to know what % of students, faculty and staff are currently vaccinated so that I can make an informed decision about whether to wear a mask if the policy changes. I would like a survey to be sent out in which students, faculty and staff reply with their vaccination status.

The weather is nice enough to allow open windows and doors and time spent outside. My child is not asked to wear a mask in any other setting, not even an airplane. I believe it is the responsibility of the concerned individuals to make choices for their own families not for entire schools. We will not be back in the fall if masking continues to the end of the school year, if it were not so close to the end of year we would be enrolling her elsewhere now. I have always spoke/thought highly of this school until this.

To my knowledge, most if not all of the other schools in humboldt county have removed mandatory masking, and I have not heard of any covid outbreaks.

I don't really care.

RCM has far surpassed most other local schools with their mask requirements and I do not believe it to be healthy nor relevant to continue the current marking policy.

i honestly think all this mask stuff is bullshit i really can't deal with it anymore seriously its all bullshit is all i have to say n they should make it optional not a fucking law.

Masks optional indoors/outdoors for fully vaccinated people in classrooms.

Masks required for schoolwide indoor events.

Masks required for symptomatic students/staff (fever, cough, sneeze, runny nose), positive antigen, exposure/close contact as well as asymptomatic positive COVID-19 students/staff masking/isolation per CDC

We should continue surveillance testing.

Masking policy to be reassessed as county healthcare facilities adapt to patient occupancy.

I believe the kitchen staff should always be required to mask for continued safety measures even after the masking stops it has not been a problem to myself or coworker to do and it helps protect students and staff on going from any transmission of infection threw food.

Most schools, including ours, have had active Covid cases this spring. It is still a deadly disease for 1%, and causes terrible organ damage and "long covid" symptoms. Without a vaccine mandate or a mask mandate, it's irresponsible to be needlessly risky. We've all learned how to mask for two years, we can keep it up while there is still a pandemic.

I fully support and appreciate the current indoor masking policy at RCM.

If RCM does allow indoor masking to be optional, I kindly request that testing be routinely done (weekly) and results monitored by the school staff. I would also request a return to social distancing when unmasked (which sounds difficult to go back to).

We are so close to the end of the school year. I believe we should just go with the current policy and revisit potential changes prior to next school year.

There have been for exposure notices in the last week, and by my count, two people infected in my son's class last Tuesday. As a home with immunosuppressed, who takes immunosuppressants every 12 hours and is in the highest risk category, I will have no choice but to exercise our Independent Study options for the remainder of the school year. As a public institution, RCM has done a wonderful job curtailing spread on the Manila campus, why change course now?

It seems prudent to continue to mask indoors for the next 6 weeks until the end of school. There is currently a surge of cases, though most are not reported to public health, because they are home rapid tests. It does not affect whether our child attends either way, and we defer to the staff and teachers at RCM and their comfort level. I look forward to no masks in the 2022-23 school year.... hopefully :)

I appreciated Candi's suggestion to keep the masking policy for the next month to keep students from missing school days at the end of the school year.

We have embraced masking over the last couple of years in order to reduce the spread of covid and to protect the most vulnerable members of our community. Now that medical science has developed vaccines and effective treatments for covid19 I feel it is no longer necessary to mask indoors.

I think that the policy should defer almost entirely to the preferences and comfort level of staff who must work on site, at least through the short remaining period of the year. We ask a lot of teachers and staff, and anything that eases their stress, allows them to feel safe working in closer proximity with students, etc., seems worth it.

Cases are fluctuating, but hospitalizations and deaths are remaining very low. Covid is not going away. And due, in part to medical advancements, it is no longer a huge threat to most people. It is time for choice and personal risk assessment, otherwise there is no end in sight for this mask mandate. We have vaccines, treatments, and masks to defend oneself if you choose to or are at high risk. We are one of the only local schools that has chosen to extend its own mandate far past the one required. Who are we to be solely enforcing this? Stricter than CDC recommends?! These kids need to be allowed an off ramp from these emergency procedures, and a gateway into some sense of normalcy. Please follow suit and make masking optional.

Hi, I am a nurse who is in a position to see Covid Case reports daily and I can tell you that we are in a surge. How high the numbers go depends on our actions. Please remember that we need to protect the vulnerable in our community. This is not just about our personal comfort or our children's. We need to protect those who cannot be vaccinated as well as people with autoimmune diseases, our elderly family and community members and remember that many people have gotten sick that are fully vaccinated and boosted. We need to be cognizant of new variants and get through this school year. We are close to the finish line here. In my opinion a better time to reevaluate this change will be in the fall prior to the new school year. Thank you.

Considering the amount of sickness I've been seeing on campus, I'm surprised we're doing this survey now. Thinking about all the cases that have popped up in our community, is NOW really the time to take off masks indoors? Imagine if they had been unmasked at school. It wouldn't have mattered that they contracted COVID on their own time, they could have potentially spread it to everyone they came in contact with. I don't have a choice but to work. I wear a mask and I'm vaccinated. I know vaccinated people who have contracted COVID. Assuming that because I "choose" to work or that my kids "choose" to go to school isn't really a fair assessment of the risk we are wanting to take by having those who are less fearful/cautious come into school unmasked. If recent sickness has shown anything it is that not everyone's judgement is 100% sound...and that even those who are coming from a good place and taking precautions can still be at risk of catching and spreading this. I don't think it'll hurt anyone to keep current policies in place until the end of the school year. We seriously only have 1.5 months left.

Aaron expressed that wearing a mask is at times hard because it makes a feeling of over heating occasionally

Your policies are negatively affecting children's ability to think critically through complex situations. Wearing masks outdoors, ESPECIALLY NOW, is neurotic. You aren't protecting anybody from anything. Even indoors at this point is quite silly unless you all are wearing fitted N95's. Which I assume you are, since...science, right? Children are being deprived of innate knowledge of how the natural world actually works - basic chemistry and physics. In short - these policies make people dumber, out of fear of something that statistically speaking shouldn't even be a talking point. I understand at the height of the pandemic your decisions to acquiesce to the forces at be and impose various (irrational) policies, but now it is just unacceptable. In your role to prepare children for the world at large you are failing. You are reinforcing weak, fear-based modes of being, and in my opinion are unfit for the duties at hand - unless of course the goal is to create a society based on authoritarian structure and cognitive dissonance. In that case - keep up the good work! The only reason someone should be wearing a mask to school is because they ARE sick - but well enough to attend and perform at normal levels. This helps limit spread, however not as much as just staying home. Which leads to the policy of just staying home if you're sick, and no one wearing masks at schools because they are NOT sick. Masking healthy people does not make anyone safer. Increasing personal responsibility on the other hand both increases safety and improves the quality of the minds you are in charge of curating.

In the last week we have had covid notifications from both of our childrens' classrooms and I am so grateful we have kept masks on indoors. We have 3 local friends with covid right now. I have autoimmune conditions and the kids are picked up from school by a grandparent weekly- we have been counting on the protection of the kids masking at school. With only a matter of weeks left in the school year, we do not feel safe enough to remove masks in indoor settings right now. Thank you.

I think that Eli would feel most comfortable with continuing masking indoors.

Honestly i dont like masks

I believe that it should be optional for those who want their masks off because them who say that your protecting others are usually wearing the top 2 most safe masks (N95 and KN95). I also would like to mention that when we take our masks off there indeed would be more cases but that will not change. Whether it be 2 years from now or today, the world does keep turning and it's time we start turning with it. Thank you.

It is hard to do work when my glasses keep fogging when wearing masks.

A large portion of students, myself included, may continue to wear masks regardless. Plus most of us are vaccinated. Perhaps have masks optional only for vaccinated people?

I support keeping an eye on case trending and would support opening to optional masks indoors if our case counts drop and the trend is not going up over some time (2 weeks?). I have agreed with Candi's advice all along and would defer to her recommendation most likely.

Dear Bryan,

Please provide this input on the above topic to the Board for its consideration.

I am writing this email just a few weeks before the end of the school year. This is also just a few weeks after the Board decided to maintain the mask protocol until the end of the year. Also contemporaneous with this writing, the County released data on the week's case count - 245 new cases, four hospitalizations, and tragically, one death. (Incidentally, The 245 new cases is 35 per day. This is up from last week's 24 per day count.)

Given the Board's reasoning when it decided a few weeks ago to continue the masking protocols, the fact that there are now fewer weeks in the school year than there were at the time their reasoning led to the conclusion to extend, and the fact that case counts are on the rise, it is inconceivable to me that the Board would reverse the decision. But I am writing to support retaining the masking protocol as is until the end of the year.

I fully understand people's frustration with continued vigilance. We've pulled together as a community and invested considerable resources into safety and prevention. It has been exhausting. And the numbers were going down for a while. And there is talk of COVID becoming endemic...and many other reasons that we are just really done with masking.

But the potential harm from not masking for the very short period of time left in the school year far outweighs the potential harm of wearing masks for another few weeks. If one person is stricken gravely ill from lax mask policies, we would wonder if it could have been prevented. But the inconvenience of masking, though it affects every one of us, is minor comparatively.

I also want to raise the question, "who is at risk?" If we make the decision to allow masking voluntarily, who is impacted most? If the answer is young healthy people who are very unlikely to experience significant negative consequences of contracting COVID, perhaps masking is less important. We would still feel pretty horrible if one of those young healthy people became seriously ill. But the odds are against that happening.

But is this the demographic that could be impacted? How many teachers are high risk? How many students live with parents/guardians that are older? How many community members have underlying conditions that put them at risk? We are wearing masks for their sake, not our own. I am willing to inconvenience myself and my children if it means increasing protection to the most vulnerable in our community - especially for just the next few weeks.

There are many more reasons that I think we should keep the mask protocol in place for this school year. (We should also be prepared to reassess next school year.) But I wanted to elevate the contrast between who stands to gain and what exactly is gained with voluntary versus mandatory masking. Let's focus on protecting the vulnerable, the high exposure, and the high risk folks in our school community.

Thank you for your consideration.

David Loya



LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Redwood Coast Montessori

CDS Code: 12-62679-0137653

School Year: 2022-23

LEA contact information:

Bryan Little

Director

707-832-4194

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2022-23 School Year

Projected Revenue by Fund Source

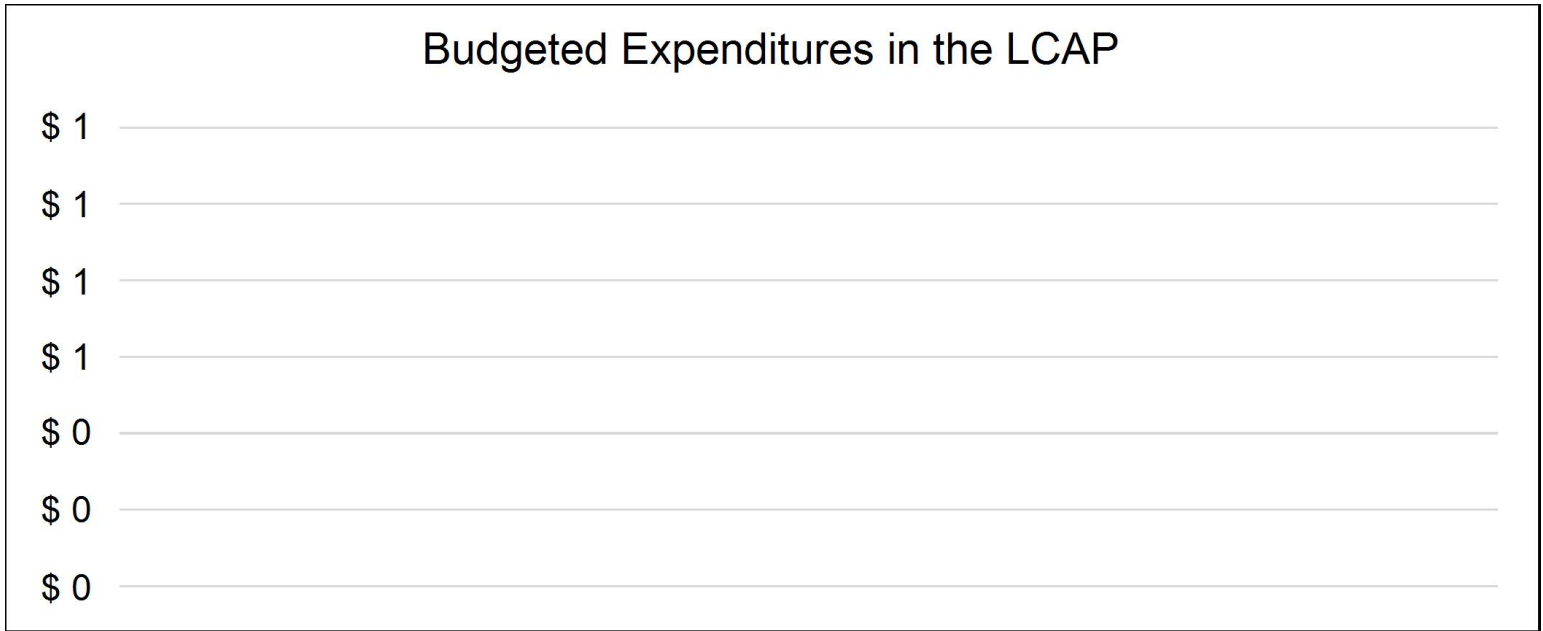
Total LCFF funds
\$0
0 %

This chart shows the total general purpose revenue Redwood Coast Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Redwood Coast Montessori is \$, of which \$ is Local Control Funding Formula (LCFF), \$ is other state funds, \$ is local funds, and \$ is federal funds. Of the \$ in LCFF Funds, \$ is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Redwood Coast Montessori plans to spend for 2022-23. It shows how much of the total is tied to planned actions and services in the LCAP.

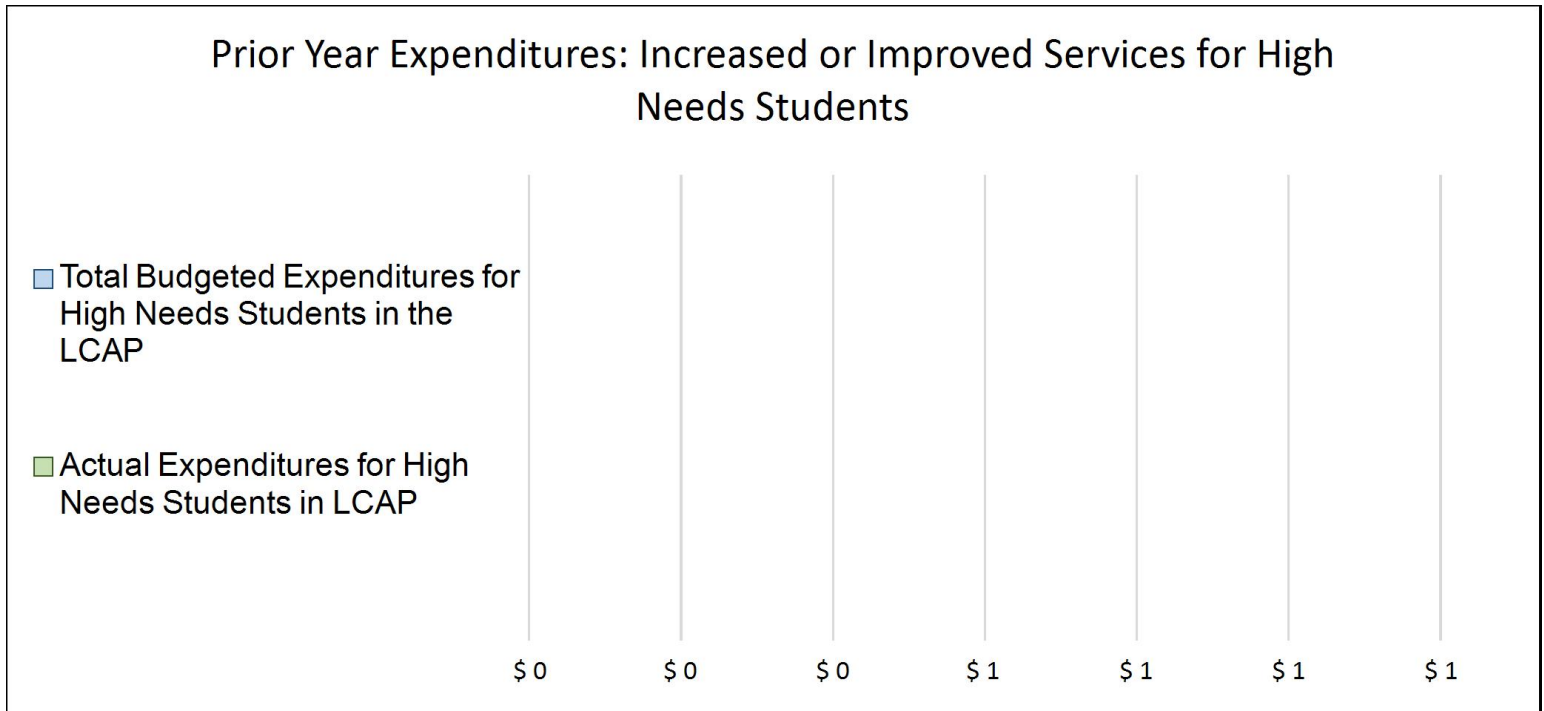
The text description of the above chart is as follows: Redwood Coast Montessori plans to spend \$ for the 2022-23 school year. Of that amount, \$ is tied to actions/services in the LCAP and \$ is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2022-23 School Year

In 2022-23, Redwood Coast Montessori is projecting it will receive \$ based on the enrollment of foster youth, English learner, and low-income students. Redwood Coast Montessori must describe how it intends to increase or improve services for high needs students in the LCAP. Redwood Coast Montessori plans to spend \$ towards meeting this requirement, as described in the LCAP.

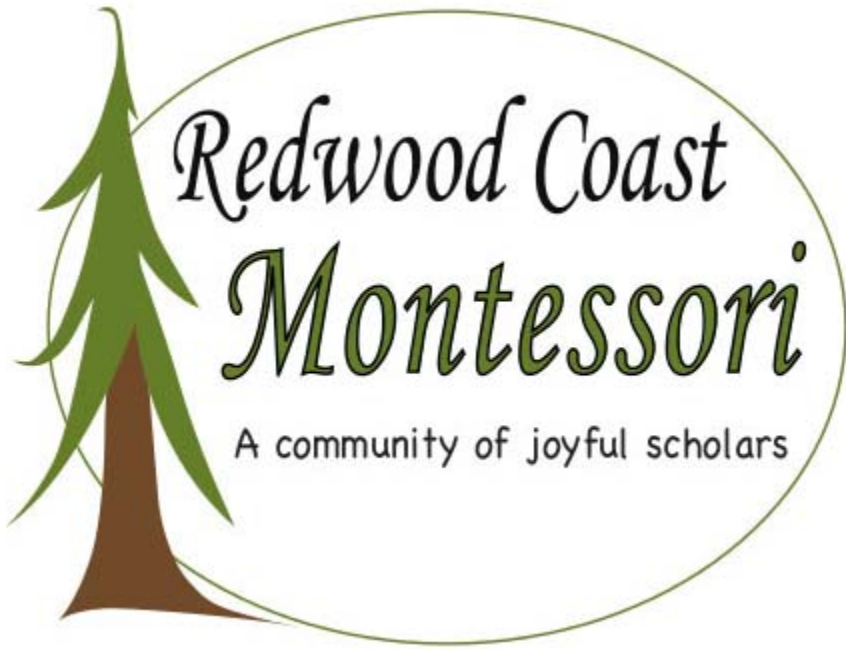
LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2021-22



This chart compares what Redwood Coast Montessori budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Redwood Coast Montessori estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021-22, Redwood Coast Montessori's LCAP budgeted \$ for planned actions to increase or improve services for high needs students. Redwood Coast Montessori actually spent \$ for actions to increase or improve services for high needs students in 2021-22.



Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Redwood Coast Montessori	Bryan Little Director	info@redwoodmontessori.org 707-832-4194

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).

Redwood Coast Montessori engaged with its educational partners for the development of the 2021-22 Local Control and Accountability Plan (LCAP) throughout the spring of 2021. Resources available as of June 23, 2021 did not permit the inclusion of all state funds included in the Budget Act of 2021. Additional funds not included in the 2021-22 LCAP include:

- * LCFF S&C including One-time 15% Add-On (\$0.00): RCM did not receive this funding.
- * Educator Effectiveness Block Grant (\$54,162): A public meeting/forum was held on December 8, 2021 regarding the Educator Effectiveness Block Grant.
- * A-G Completion Improvement Grant (\$8,202)
- * Expanded Learning Opportunities Program (\$50,000): A public meeting/forum was held on November 10, 2021 regarding the Expanded Learning Opportunities Program.
- * Pre-K Planning & Implementation Grant (\$26,307): A public meeting/forum is planned on May 21, 2022 regarding the Pre-K Planning & Implementation Grant.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Redwood Coast Montessori has an unduplicated pupil enrollment of 39%. As such, RCM will not be receiving additional concentration grant add-on funding. We will, however, continue to provide robust support for all of our scholars who are low-income, English learners, and/or foster youth.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

COVID Emergency Relief Funds (CARES, ESSER I & CRRSA ESSER II) and Expanded Learning Opportunities (ELO-G) were used to support professional development and staff planning and preparation in light of the pandemic. We also dedicated these funds to expanded summer school programming, instructional materials, and one-time technology purchases.

In addition to the engagement of all partners and colleagues as noted in the 2021-2022 LCAP from September to June 2020-2021. We expanded our efforts to engage our partners in several ways during the 2021-2022 school year, between August and January 2022 when other funds became available. School-based staff engaged during our weekly and monthly staff meetings that included teachers, administrators, and classified staff, monthly site council meetings, monthly school board meetings, LCAP/WASC meetings.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

Our number one priority is to keep students and staff safe at all times. To this end, RCM has implemented some actions identified in our Elementary and Secondary School Emergency Relief (ESSER) III Expenditure Plan. Specifically, we have successfully increased the number of classroom paraprofessionals, and provided access to all necessary student materials and PPE as suggested by HCOE and public health, ongoing professional development focused on engaging students during this challenging time and being able to provide additional supports for those who need it after school hours.

We have also experienced some challenges to full implementation on expanded tutoring and parent education. Due to the Omicron variant there was a noticeable decrease in student attendance and some supports for unduplicated students including progress monitoring and program improvement.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Redwood Coast Montessori considers the LCAP to be the comprehensive planning document which captures the priorities, goals, and actions to improve scholar outcomes. As such, the additional funds received are viewed through the lens of the LCAP to determine where scholar needs exist and what services are needed to address those needs. Some examples of the alignment of these funds to the LCAP are:

* ESSER III: Addressing the Impact of Lost Instructional Time - the additional funds received are in alignment with the following goals in our LCAP:

- Goal #2, Action 1 – Employ highly qualified teaching staff to support RCM’s base educational program, goals, actions, and services.
- Goal #2, Action 2 – Support professional development related to the implementation of the State standards
- Goal #2, Action 4 – Employ two highly qualified resource specialists in addition to providing speech therapy services
- Goal #2, Action 5 – Provide additional additional academic intervention in response to learning loss related to COVID-19

* ESSER III: Use of Any Remaining Funds - the additional funds received are in alignment with the following goals in our LCAP:

- Goal #2, Action 3 – Support reading intervention, including all unduplicated learners
- Goal #2, Action 6 – Provide additional instructional support through classroom intern/assistant
- Goal #3, Action 4 – Host daily afterschool programs including enrichment classes.
- Goal #3, Action 5 – Provide additional SEL support services for high risk students.

Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education’s (CDE’s) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA’s educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA’s 2022–23 LCAP.

Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

Prompt 1: *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

Prompt 2: *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Prompt 3: *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”*

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fq/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fq/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

Prompt 4: “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

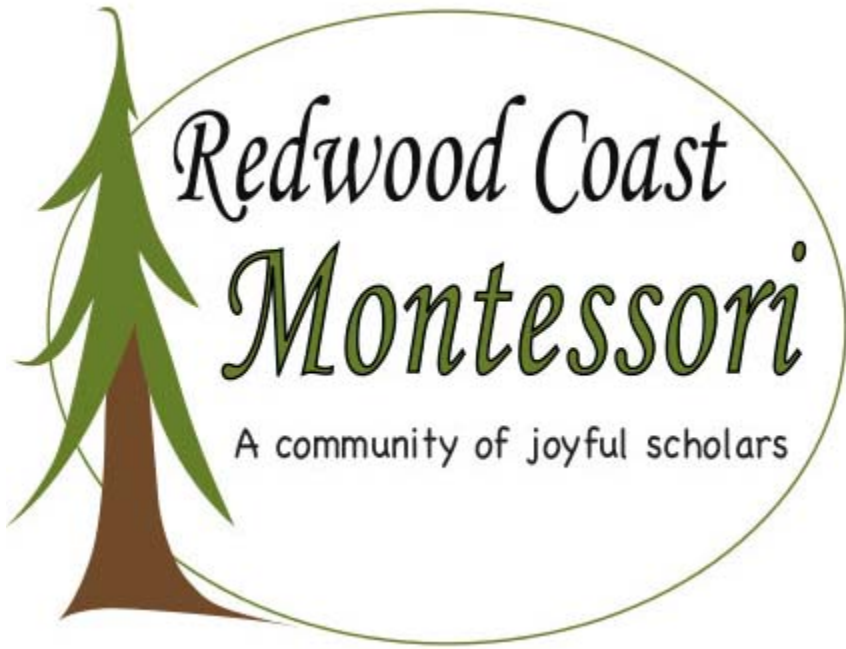
If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

Prompt 5: “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education
November 2021



Local Control Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Redwood Coast Montessori	Bryan Little Director	info@redwoodmontessori.org 707-832-4194

Plan Summary [2022-23]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Redwood Coast Montessori began as an independent charter school during the fall of 2013 with sixty students in grades K--7th. Throughout the evolution of RCM, one consistent characteristic, which has triggered growth in capacity and services, is the support of parents and students for the dedicated teachers and for the traditional Montessori method used at RCM. Based on the Montessori method in conjunction with Project Based Learning, students at RCM are offered a rich curriculum that truly values the child and the natural development of the

whole child. Redwood Coast Montessori classrooms are designed based on the Montessori approach of a carefully “prepared environment” that is filled with beautiful, long lasting materials that are engaging, age appropriate and pedagogically designed as self--correcting learning tools. Students spend long uninterrupted academic time following their own passions as they work to build their focus and commitment to doing work that matters. The curriculum is integrated throughout all grade levels and all subject matter in such a way that it allows for mastery of concepts at an individual pace that is appropriate for each student. Redwood Coast Montessori students thrive within this traditional Montessori environment as they are guided by dedicated and highly qualified teachers who value the individual needs of each student and emphasize the responsibility each student has to self, community, and environment.

With the continued success of Redwood Coast Montessori, and increased demand for expanding grade and enrollment opportunities, the RCM community has grown to include grades TK - 12th. With the inclusion of high school grades and expansion of the adolescent program, RCM has expanded and refined its inclusion of Project Based Learning as an integral part of our traditional Montessori curriculum. Redwood Coast Montessori constantly strives to meet the individual needs of each student using traditional Montessori pedagogy and 21st Century resources.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Based on a review of LCAP goals, stakeholder input, and self-assessment tools, there are several areas of success for Redwood Coast Montessori. Some of the areas of greatest accomplishment is with hiring of highly qualified teachers and staff. In part due to the outstanding reputation of RCM and the use of Montessori pedagogy, many highly qualified individuals seek employment with RCM. The new RCM employees along with our existing teachers and staff make up an outstanding community of dedicated and highly qualified educators. RCM will work to retain RCM staff through a series of support and professional development strategies outlined in our 2022 LCAP.

With the 2021-22 school year, Redwood Coast Montessori successfully implemented the California Health Kids Survey among students, parents/guardians, and staff. The data from these surveys provided much needed information for refining our goals and establishing measurable metrics to evaluate on an annual basis. The success and expansion of the high school program will be supported through hiring of additional highly qualified teachers and ongoing training to provide the skills to implement new curriculum.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

As our program continues to grow, there is the need to hire additional highly qualified staff and to provide the needed training and professional development for all staff including existing staff. RCM continues to work towards developing a meaningful tracking system and

framework for monitoring student progress at all grade levels. While RCM benefits from the strong governance provided by our School Board and Site Council, there is the need to provide time for strategic planning and to increase student participation in school governance.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal #1:

RCM developed this goal as a means to acknowledge the importance of the SLOs for all students and to help Improve student success and support of diverse learners through a focus on PBL/Montessori pedagogy.

Identified Needs:

1. Highly qualified teaching staff
2. Develop better understanding of SLOs among students and staff
3. Students develop a stronger growth mindset approach to school
4. Increase student participation in governance of school

Goal #2:

RCM developed this goal to help guarantee the ongoing improvement of academic achievement for all students.

Needs:

1. Increase ELA & math assessment scores
2. Access to technology and high quality Montessori and PBL Curriculum
3. Improve evidence-based services for the identified low performing pupils to accelerate increases in academic achievement

Goal 3:

RCM developed this goal to help strengthen the culture and climate of Redwood Coast Montessori and to help ensure the active participation of all partners including students, parents/guardians, and community members.

Needs:

1. Increase parent/guardian understanding of authentic Montessori and PBL pedagogical practices
2. Rebuilding of after school program
3. Additional opportunities for after school enrichment classes and athletic opportunities
4. School counselor

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Redwood Coast Montessori is not a school needing comprehensive support and improvement (CSI).

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Redwood Coast Montessori is not a school needing comprehensive support and improvement (CSI).

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Redwood Coast Montessori is not a school needing comprehensive support and improvement (CSI).

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Monthly staff meetings to review and update school priorities from September through June.

Weekly teacher meetings to review and update academic and community priorities from September through June.

Multiple surveys were made available to the entire school community throughout the 2021-22 school year. Overall there was a high level of participation with the surveys indicating strong stakeholder interest in school functions.

Preparation and writing of the RCM self-study, an integral component of the Western Association of Schools and Colleges (WASC) review, provided valuable information and guidance for developing the LCAP. This work along with information and guidance from RCM's Site Council and LCAP meetings helped to update and outline the metrics and actions for the 2022-23 LCAP.

Monthly Site Council meeting composed of staff, parents, and administration provided guidance for determining how to update the 2022-23 LCAP.

In addition, formation of RCM's Equity and Diversity Committee allowed for important information included in drafting the LCAP.

A summary of the feedback provided by specific educational partners.

Stakeholder feedback indicated strong support for resources and staff to support social/emotional learning at all age groups. There were some additional concerns about progress in some academic areas including writing and math, however, the primary concern was for social-emotional learning and for ci

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

The consultations gathered through stakeholder input helped to reform and refine the goals for the 2022-23 LCAP. Information provided on the State Dashboard (2021 results) defined some of the areas of need to be addressed on the LCAP. The main area that was identified from the Dashboard were math scores for all student based on the CAASPP results. Other areas that were identified were increased support for SWD.

Goals and Actions

Goal

Goal #	Description
1	Student Learner Outcomes: Improve student success and support of diverse learners through a focus on PBL/Montessori pedagogy.

An explanation of why the LEA has developed this goal.

RCM developed this goal as a means to acknowledge the importance of the SLOs for all students and to help Improve student success and support of diverse learners through a focus on PBL/Montessori pedagogy.

Identified Needs:

1. Provide instructional assistants to support student learning
2. Develop better understanding of SLOs among students and staff
3. Students develop a stronger growth mindset approach to school
4. Increase student participation in governance of school

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Achieve and maintain an average daily attendance (ADA) rate >96%	98% (as of P1 2/21/20, 2019/2020)	96% (as of P2 3/25/2022, 2021/2022)			98% ADA Rate
Achieve and maintain chronic student absenteeism rate <2.0%	1.5% (2018-19)	0% (2020-21)			< 2% chronic absenteeism rate
Maintain low rate of student suspension. “Blue” as measured	18-19 0.7% suspension rate; Blue baseline	0% (2020-21)			0.0% suspension rate.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
on the California School Dashboard					
Maintain a cohort graduation rate >95% with all student population subgroups moving to “Blue” as measured on the California School Dashboard.	No baseline data. 2021-22 first graduating class.	83% (2021-22)			100% graduation rate for all student subgroups.
CHKS Student Survey (A6.7): Percentage of students indicating the things they do in school "pretty much" or "very much" makes a difference (P6)	Baseline data to be collected in 2021/2022.	Adolescents (54%); High School (48%) [2021-22]			75% or higher
CHKS Student Survey (A6.9): Percentage of students indicating they "pretty much" or "very much" work hard to understand things when doing schoolwork (P6)	Baseline data to be collected in 2021/2022.	Adolescents (66%); High School (62%) [2021-22]			75% or higher
CHKS Student Survey (A6.7): Percentage of students indicating they "pretty much" or "very much" have a say in how things work at school. (P6)	Baseline data to be collected in 2021/2022.	Adolescents (49%); High School (52%) [2021-22]			75% or higher

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Number of students participating in school oversight committees (school board, site council, FoRCM, Ad hoc committees, etc.)	1	0			2
Promote parent/guardian support for and understanding of Montessori and PBL pedagogy	Four parent information meetings; music recital; events significantly limited due to pandemic.	Four parent information meetings; three PBL exhibitions, musical performance; talent show; history day; theatrical performance			Three annual events at each campus designed to highlight student work and a better understanding of Montessori and PBL pedagogy.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Engagement	Support expansion of after school program to include enrichment classes and activities.	\$5,000.00	No
1.2	Graduation rate	Provide coursework and academic counseling for high school students to prepare them for college and career.	\$40,000.00	No
1.3	Instructional assistants	Provide instructional assistants to support all students particularly low income students and SWD.	\$25,000.00	No
1.4	Professional Development	Support Montessori and PBL training for new teachers	\$12,000.00	No

Action #	Title	Description	Total Funds	Contributing
1.5	Educational staff	RCM will employ the following educators to support the school's base educational program, the goals, actions and services outlined in this LCAP. <ul style="list-style-type: none"> • 21 teachers • 7 classroom assistants • 1 site supervisor • 1 director 	\$1,788,525.00	No
1.6	In service days	Increase number of annual in service days to four for all teaching staff.	\$10,000.00	No
1.7	Student Support (social-emotional learning)	Secure intern social workers from university programs to target chronic absenteeism and associated family issues. Partnership with HSU.	\$2,000.00	No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

With the successful implementation of the California Health Kids Survey for students, parents, and staff, the actions outlined for the 2022-23 school year are targeted towards more measurable metrics. These metrics will be tracked over time and will provide needed information about how to better target actions and needed funding. Other metrics that were more clearly defined for the 2022-23 school year include the high school graduation rate and student engagement through daily attendance.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Goal 1 actions/services were largely funded as planned.

An explanation of how effective the specific actions were in making progress toward the goal.

Goal 1 actions were largely successful as outlined in the 2021-22 LCAP. Implementation of the CHKS was completed by students, parents/guardians, and staff. Development of the Connections curriculum made good progress. Providing staff advisors for the high school

students was not as successful as originally planned. In response to this outcome, an additional staff person will be assigned to support administration of the Connections curriculum thus allowing administration to focus on supporting students with necessary academic counseling. The addition of a second resource specialist has been a great improvement to the quality and capacity of our support of students with IEPs.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The primary changes with Goal 1 was in setting more measurable metrics to determine success towards achieving the identified goal. Now that the CHKS has been administered for the first year, metrics were established to track the success of specific actions. The CHKS will continue to be used to measure these metrics. The other major change was to move the metric of retaining highly qualified staff from Goal #2 to Goal #1 to reflect the importance of quality instruction in supporting the student learner outcomes.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	Student Academic Achievement

An explanation of why the LEA has developed this goal.

RCM developed this goal to help guarantee the ongoing improvement of academic achievement for all students.

Needs:

1. Highly qualified instruction
2. Increase ELA & math assessment scores
2. Develop portfolio system for tracking student progress
3. Improve evidence-based services for the identified low performing pupils to accelerate increases in academic achievement

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Scores: Percentage of Students Meeting or Exceeding the Standard in ELA (P4)	57% (2018-19)	65% (2021-22) No data 2020-21			70% or higher
CAASPP Math Scores: Percentage of Students Meeting or Exceeding the Standard in Math (P4)	42% (2021-22) No data 2020-21	50% (2021-22) No data 2020-21			60% or higher
California Science Test (CAST): Percentage of Students Meeting or	Not included in 2020-21 LCAP	Not tested			Increase overall science results by 2% per year.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Exceeding the Standard (P4)					
Percentage of Special Education goals met by RCM students with IEPs (P4)	Not included in 2020-21 LCAP				66% or higher
Reading Intervention: Percentage of students graduating the program on an annual basis. (P4)	Not included in 2020-21 LCAP				50% or higher
Highly Qualified Teachers	2020-21 Two teachers employed through use of interim internship as they work to complete credential.	2021-22 One teacher employed through use of interim internship as they work to complete credential.			100% of teaching staff will have CA teaching credential in their area of instruction.
CAASPP Participation ELA (P4)	Not included in 2020-21 LCAP	92% (2020-21)			95% or higher
CAASPP Participation Math (P4)	Not included in 2020-21 LCAP	94% (2020-21)			95% or higher
CAST Participation (P4)	Not included in 2020-21 LCAP	Not tested			95% or higher
CAASPP Participation ELA: Students w/ Disabilities (P4)	Not included in 2020-21 LCAP	91% (2020-21)			95% or higher
CAASPP Participation Math: Students w/ Disabilities (P4)	Not included in 2020-21 LCAP	91% (2020-21)			95% or higher

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Highly qualified teaching staff	Support new teachers with completing the teacher induction program	\$7,500.00	No
2.3	Reading intervention	Support reading intervention - including EL (English Learners), Foster and Homeless youth, Students with Disabilities, Socioeconomically Disadvantaged students	\$30,106.00	Yes
2.4	Special education	RCM will employ the following special education staff to support SWD, actions and services outlined in this LCAP. <ul style="list-style-type: none"> • 2 RST • 1 speech therapist 	\$154,948.00	No Yes
2.5	COVID related learning loss	Provide expanded learning opportunities by increasing the number of days providing service by 30 and extended all instructional days to 9 hrs.		No
2.6	Student performance	Generate portfolio template for all students grades TK-12 that can be used to track student progress	\$15,000.00	No
2.8	PBL framework and repository	Develop PBL framework and repository that includes concrete assessment tools	\$15,000.00	No
2.9	Math Assessment Scores	Provide additional math focused professional development for teachers.	\$4,000.00	No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Goal #2 was largely implemented as planned. The CSSS survey was administered as outlined. RCM employed the number of teachers outlined in the goal, although one teacher did leave mid-way through the school year requiring the need to hire a long-term substitute. A new reading intervention teacher was hired along with an additional special education teacher.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Goal #2 actions/services were largely funded as planned.

An explanation of how effective the specific actions were in making progress toward the goal.

The actions outlined for Goal #2 in the 2021-22 LCAP were appropriate for accomplishing goal outlined. The metrics for the goal were fairly broad in terms of implementing the CAHKS, however, these were updated for the 2022-23 LCAP. Both math and ELA scores increased as outlined in the metric. More specific measurements were established for assessing progress towards this aspect of the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The most significant change with Goal #2 was with development of more specific metrics that can be measured and tracked over time. In addition, tracking CAASPP participation was added as a metric to gain insight into academic achievement.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	School Culture and Climate

An explanation of why the LEA has developed this goal.

RCM developed this goal to help strengthen the culture and climate of Redwood Coast Montessori and to help ensure the active participation of all partners including students, parents/guardians, and community members.

Needs:

1. Increase parent/guardian understanding of authentic Montessori and PBL pedagogical practices
2. Rebuilding of after school program
3. Additional opportunities for after school enrichment classes and athletic opportunities
4. School counselor

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Provide robust after school care and enrichment activity options	Prior to COVID-19, RCM provided an aftercare option at the Manila campus M-F. No high school sports are available.	Aftercare program provided M-F from 2:30 until 5:30. Arcata campus providing after school care until 5 pm. including one enrichment class. Tennis and basketball available for adolescent and high school students. Track & Field available for elementary and adolescent students.			After school program at Manila campus and a minimum of four after school enrichment classes at each campus. Minimum of two athletic teams for both adolescent age students and high school students.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Support Manila Community Resource Center and First 5 Playgroup	MCRC operates under the direction of a part time resource center director and a part time resource center assistant.	Resource center director hired at 80% of full time. Assistant hired at 20% of full time.			Maintain grant requirements to support programs and work towards creating a full time director position.
CHKS Student Survey (A7.4): Percentage of students describing school experience as "satisfied" or "very satisfied." (P6)	Baseline data to be collected in 2021/2022.	Adolescents (73%); High School (67%) [2021-22]			75% or higher
Provide student social/emotional counseling services	Although resource staff have provided limited student support services, RCM does not currently provide social/emotional counseling.	Weekly pride empowerment group provided for adolescent and high school students. Additional assistant hired to support social emotional needs of SWD.			Minimum of a 0.5 FTE school counselor available to provide counseling services.
CHKS Staff Survey (A5.8): Percentage of staff that agree the district has clean and well-maintained facilities and property. (P1)	Baseline data to be collected in 2021/2022.	86% (2021-22)			95% or higher
CHKS Parent Survey (A6.1): Percentage of parents/guardians that "agree" or "strongly agree" that they feel	Baseline data to be collected in 2021/2022.	91% (2021-22)			95% or higher

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
welcome to participate at this school. (P3)					
CHKS Parent Survey (A6.1): Percentage of parents that parents/guardians that "agree" or "strongly agree" that their school actively seeks the input of parents before making important decisions. (P3)	Baseline data to be collected in 2021/2022.	88% (2021-22)			95% or higher
CHKS Parent Participation: Number of parents completing the CHKS Parent Survey. (P3)	Baseline data to be collected in 2021/2022.	54			75
Parents participating directly in the decision making process: School Board, Site Council, FoRCM. (P3)	10 (2021-22)	12 (2021-22)			15
CHKS Student Survey (A6.5): Percentage of students identified as "pretty much" or "very much" having caring adults at school. (P6)	Baseline data to be collected in 2021/2022.	Adolescents (76%); High School (52%) [2021-22]			80% or higher
CHKS Student Survey (A8.1): Percentage of students indicating	Baseline data to be collected in 2021/2022.	Adolescents (79%); High School (94%) [2021-22]			95% or higher

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
they feel safe at school. (P6)					
CHKS Staff Survey (A5.4): Percentage of staff that "agree" or "strongly agree" that school is a safe place for staff. (P6)	Baseline data to be collected in 2021/2022.	86% (2021-22)			95% or higher
CHKS Parent Survey (A7.1): Percentage of parents/guardians that "agree" or "strongly agree" that school is a safe place for their child. (P6)	Baseline data to be collected in 2021/2022.	96% (2021-22)			95% or higher
CHKS Parent Survey (A7.1): Percentage of parents/guardians that agree or strongly agree that their school provides instructional materials that "reflect my child's culture, ethnicity, and identity." (P6)	Baseline data to be collected in 2021/2022.	77% (2021-22)			90% or higher
Conduct annual school Board retreat for strategic plan development	Not included in 2020-21 LCAP	New goal established 2021-22			one annual retreat each year

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	School Climate Survey	Continue to implement CHKS on an annual basis.	\$1,000.00	No
3.2	Manila Community Resource Center and First 5 Playgroup	Submit application, fiscal documents, and required progress reports in order to maintain active participation with County and local agencies to connected these valuable resources.	\$100,675.00	No
3.3	Parent/guardian support and understanding of Montessori and PBL	Host a minimum of 6 parent/guardian events designed to educate families and community members about the value of Montessori and PBL education.	\$8,000.00	No
3.4	After school care and enrichment activities	Host a daily after school program for the Manila campus. At both campuses, host a minimum of 3 after school enrichment classes or clubs.	\$31,536.00	No
3.5	Social/emotional counseling/support	Provide SEL support services for high risk students based on need and recommendation.	\$25,961.00	Yes

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Goal #3 was largely implemented as planned. The CHKS survey was administered as outlined. RCM continued to support the Manila Community Resource Center and the Humboldt First 5 Program. While RCM did host the number of events outlined in the 2021-22 LCAP to increase understanding of Montessori and PBL pedagogy, we continue to work towards hosting more academic informational meetings for existing parents/guardians. Our after school program was reestablished as outlined including the hiring of a new director and assistant. RCM was not able to provide any additional staff to provide social-emotional counseling.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Goal #3 actions/services were largely funded as planned.

An explanation of how effective the specific actions were in making progress toward the goal.

The actions outlined for Goal #3 in the 2021-22 LCAP were appropriate for accomplishing goal outlined. The metrics for the goal were fairly broad in terms of implementing the CHKS, however, these were updated for the 2022-23 LCAP. Expansion of the daily program to include after school care was carried out as planned.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The most significant change with Goal #3 was with development of more specific metrics that can be measured and tracked over time.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2022-23]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
		\$0.00	

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

*** Information to be updated for 2022-23.

Approximately \$110,729 will be allocated from LCFF supplemental funds charter--wide during the 2021-22 school year to address the needs of the targeted groups based on the unduplicated counts of low income, English learners and foster youth students. From these supplemental funds, approximately 77% is designated to support academic progress for these targeted student groups. In addition, the remaining 23% of the funds will be used to address SEL learning for foster youth, EL, and low-income students.

Supplemental funds will be used for academic supports including providing reading intervention support for developing readers, academic learning loss support due COVID-19. Additionally, academic tutors and resource specialist time will be added to support FY, EL, LI students.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

N/A - RCM does not receive concentration funds.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		
Staff-to-student ratio of certificated staff providing direct services to students		

2022-23 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$1,280,257.00	\$60,961.00	\$104,675.00	\$830,358.00	\$2,276,251.00	\$2,210,430.00	\$65,821.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Engagement	All				\$5,000.00	\$5,000.00
1	1.2	Graduation rate	All	\$40,000.00				\$40,000.00
1	1.3	Instructional assistants	All Students with Disabilities	\$25,000.00				\$25,000.00
1	1.4	Professional Development	All	\$12,000.00				\$12,000.00
1	1.5	Educational staff	All	\$1,067,115.00			\$721,410.00	\$1,788,525.00
1	1.6	In service days	All	\$10,000.00				\$10,000.00
1	1.7	Student Support (social-emotional learning)	All	\$2,000.00				\$2,000.00
2	2.1	Highly qualified teaching staff	All	\$7,500.00				\$7,500.00
2	2.3	Reading intervention	English Learners Foster Youth Low Income	\$30,106.00				\$30,106.00
2	2.4	Special education	Students with Disabilities English Learners Foster Youth Low Income	\$16,000.00	\$35,000.00		\$103,948.00	\$154,948.00
2	2.5	COVID related learning loss	All Students with Disabilities					
2	2.6	Student performance	All	\$15,000.00				\$15,000.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.8	PBL framework and repository	All Students with Disabilities	\$15,000.00				\$15,000.00
2	2.9	Math Assessment Scores	All			\$4,000.00		\$4,000.00
3	3.1	School Climate Survey	All	\$1,000.00				\$1,000.00
3	3.2	Manila Community Resource Center and First 5 Playgroup	All			\$100,675.00		\$100,675.00
3	3.3	Parent/guardian support and understanding of Montessori and PBL	All	\$8,000.00				\$8,000.00
3	3.4	After school care and enrichment activities	All Students with Disabilities	\$31,536.00				\$31,536.00
3	3.5	Social/emotional counseling/support	English Learners Foster Youth Low Income		\$25,961.00			\$25,961.00

2022-23 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
					\$46,106.00	0.00%		Total:	\$46,106.00
								LEA-wide Total:	\$16,000.00
								Limited Total:	\$0.00
								Schoolwide Total:	\$30,106.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	2.3	Reading intervention	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: Manila Campus	\$30,106.00	
2	2.4	Special education	Yes	LEA-wide	English Learners Foster Youth Low Income		\$16,000.00	
3	3.5	Social/emotional counseling/support	Yes	LEA-wide Schoolwide	English Learners Foster Youth Low Income	All Schools		

2021-22 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$2,453,229.00	\$0.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Attendance	No	\$66,176.00	
1	1.2	Chronic absenteeism	No	\$66,176.00	
1	1.3	Connections Curriculum	No		
1	1.4	Student advisors	No		
1	1.5	Student support Services	Yes	\$55,000.00	
1	1.7	School Climate Survey	No	\$1,049.00	
2	2.1	Highly qualified credential educators	No	\$1,683,341.00	
2	2.2	Retain highly qualified teachers	No	\$10,613.00	
2	2.3	Reading intervention	Yes	\$30,106.00	
2	2.4	Special education	No	\$154,948.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.5	COVID related learning loss	No	\$210,648.00	
2	2.6	Academic intern	Yes		
2	2.8	Support high quality math instruction	No	\$7,000.00	
2	2.9	School Climate Survey	No	\$1,000.00	
3	3.1	School Climate Survey	No	\$1,000.00	
3	3.2	Manila Community Resource Center and First 5 Playgroup	No	\$100,675.00	
3	3.3	Parent/guardian support and understanding of Montessori and PBL	No	\$8,000.00	
3	3.4	After school care and enrichment activities	No	\$31,536.00	
3	3.5	Social/emotional counseling/support	Yes	\$25,961.00	

2021-22 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
	\$85,106.00	\$0.00	\$0.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.5	Student support Services	Yes	\$55,000.00			
2	2.3	Reading intervention	Yes	\$30,106.00			
2	2.6	Academic intern	Yes				
3	3.5	Social/emotional counseling/support	Yes				

2021-22 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
			0.00%	\$0.00	0.00%	0.00%	\$0.00	0.00%

Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

The LCAP template, like each LEA’s final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity’s budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA’s diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

Prompt 2: “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

Actions for English Learners: School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year: Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
 - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
 - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
 - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
 - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
 - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022