



TACMO Board Meeting - May 19, 2026 Agenda

May 19, 2026 5:30pm - 8:30pm PDT

Sycamore Valley Academy (Multi-Purpose Room) and Blue Oak Academy (Multi-Purpose Room)

In order to ensure that members of the public are provided a meaningful opportunity to address the Board on non-agenda items or agenda items that are within the Board's jurisdiction, non-agenda items may be addressed at the public comment portion of the agenda and agenda items may be addressed at the time the matter is considered by the Board. During the evening, many of the Board members will be speaking on various subjects. It should be noted that each Board member expresses only his/her opinion and not the opinion of the entire Board. Teleconferencing may be used for all purposes in connection with any meeting. All votes taken during a teleconferenced meeting shall be by roll call.

If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent at kaure@theacademiescharters.org and the complete packet will be shared electronically.

This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Karin Aure at PO Box 1189, Visalia, CA 93279 and (559) 429-4351. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.

Please scroll through the packet to view all enclosures.

1. OPENING BUSINESS

5:30pm

1.1. CALL PUBLIC SESSION TO ORDER

1.2. ADA ACCOMMODATIONS

- 1.2.1 This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 at CMO Home Office forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Karin Aure at PO Box 1189, Visalia, CA 93279 or (559) 429-4351. Such a request should be in writing if possible or may be

◆ Ask me anything... ↗

made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.

1.2.2 If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent (kaure@theacademiescharters.org), and the complete packet will be shared electronically.

1.3. IDENTIFY CLOSED SESSION TOPICS OF DISCUSSION

1.4. PUBLIC COMMENT ON CLOSED SESSION TOPICS

1.4.1 General public comment on any closed session item will be heard. The Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.

1.5. PUBLIC COMMENT ON ANY SCHOOL RELATED TOPIC

1.5.1 General public comment on any school related topic may be heard at this time. The Board asks that any public comment on an item listed on tonight's agenda be addressed at the time the item comes up for discussion by the Board. Pursuant to Board Policy, the Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.

2. CONSENT AGENDA

2.1. Approval of Minutes of the board meeting on April 21, 2026 (Enc. No. 1)

 [Enc. 1.docx.pdf](#)

 [TACMO BOD 04212026 Meeting Minutes DRAFT.pdf](#)

2.2. Approval of the April 2026 Check Register Report (Enc. No. 2)

 [Enc. 2.docx.pdf](#)

 [TACMO April 2026 Combined Board Check Register.pdf](#)

2.3. Monthly Attendance Reports for Blue Oak Academy and Sycamore Valley Academy (Enc. No. 3)

 [Enc. 3.docx.pdf](#)

 [Month 9 BOA Attendance.pdf](#)

 [Month 9 Attendance Report SVA.pdf](#)

3. PUBLIC RECOGNITION/PROCLAMATIONS/ACTION

3.1. Proclamation Honoring the Service & Dedication of Corey Morse

4. COMMUNITY REPORTS

Presentation/Public Hearing/Public Comment/Board Discussion

4.1. Teacher Representative Report

4.1.1 Blue Oak Academy

4.1.2 Sycamore Valley Academy

4.2. Principal Report

4.2.1 Blue Oak Academy (Enc. No. 4)

 [Enc. 4.docx.pdf](#)

 [Principal Report_May 2026_BOA.pdf](#)

4.2.2 Sycamore Valley Academy (Enc. No. 5)

 [Enc. 5.docx.pdf](#)

 [Principal Report_May 2026_SVA.pdf](#)

4.3. Operations Director Report

4.3.1 Sycamore Valley Academy, Blue Oak Academy, and The Academies Charters Website Improvements Update (Enc. No. 6)

 [Enc. 6.docx.pdf](#)

 [Operations Report - Websites.pdf](#)

4.4. Human Resources Director Report

4.5. Board Member Report

4.6. Superintendent Report

4.6.1 Field Trip Development and Approval Process - Review (Enc. No. 7)

 [Enc. 7.docx.pdf](#)

 [Field Trip Protocol and Planning Process.pdf](#)

4.6.2 Teacher Representative Selection Process Overview

4.6.3 TCOE Annual Oversight Reports for Blue Oak Academy and Sycamore Valley Academy (Enc. No. 8)

 [Enc. 8.docx.pdf](#)

 [TCOE Annual Oversight Report_BOA_2025-26.pdf](#)

 [TCOE Annual Oversight Report_SVA_2025-26.pdf](#)

5. BOARD DEVELOPMENT

Presentation/Public Hearing/Public Comment/Board Discussion

5.1. Board Resources

5.1.1 There are no Board Resource items to include this evening.

6. ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

6.1. **There are no Administrative Panel items to discuss this evening.**

7. GENERAL AGENDA

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

7.1. PROGRAM UPDATES

7.1.1 Strategic Action Update: Hiring Process (Enc. No. 9)

 [Enc. 9.docx.pdf](#)

 [Board Meeting 05_19_26 - Program Update from HR.pdf](#)

7.2. ACTION ITEMS

7.2.1 Monthly Financials Presentation (Enc. No. 10) ACTION

 [Enc. 10.docx.pdf](#)

 [TACMO-FY26 April Monthly Financials and FY27 Preliminary Budget.pdf](#)

7.2.2 BR 26-002 Adoption of Board Resolution to Approve Amended Articles of Incorporation (Enc. No. 11) Second Reading/ACTION

 [Enc. 11.docx.pdf](#)

 [BR 26-002_Resolution and Restated Articles_redlined.pdf](#)

7.2.3 2026-27 TCOE Declaration of Need & Annual Statement of Need for Blue Oak Academy (Enc. No. 12) ACTION

 [Enc. 12.docx.pdf](#)

 [2026-27 Declaration of Need for Fully Qualified Educators for Blue Oak Academy.pdf](#)

 [2026-27 CL505a Annual Statement of Need for Blue Oak Academy.pdf](#)

7.2.4 2026-27 TCOE Declaration of Need & Annual Statement of Need for Sycamore Valley Academy (Enc. No. 13) ACTION

 [Enc. 13.docx.pdf](#)

 [2026-27 Declaration of Need for Fully Qualified Educators for Sycamore Valley Academy.pdf](#)

 [2026-27 CL505a Annual Statement of Need for Sycamore Valley Academy.pdf](#)

**7.2.5 Frontline Education Multi-year Renewal 2026-2029
(Enc. No. 14) ACTION**

 [Enc. 14.docx.pdf](#)

 [Frontline_Education_-_Quote_for_The_Academies.pdf](#)

**7.2.6 Revised 2026-27 TACMO Academic Calendar DRAFT
(Enc. No. 15) ACTION**

 [Enc. 15.docx.pdf](#)

 [DRAFT 2026-27 CMO Academic Calendar \(rev. 05-2026\).pdf](#)

 [CALCULATION OF INSTRUCTIONAL MINUTES FOR 2026-27.pdf](#)

**7.2.7 Talk N' Roll Pediatric Speech Therapy Contracts for
Speech and Language Pathology Services (Enc. No. 16)
ACTION**

 [Enc. 16.docx.pdf](#)

 [Talk N' Roll Pediatric Speech Therapy Contract for SLP Services.pdf](#)

 [Talk N' Roll Pediatric Speech Therapy Contract for SLP Assistant Services.pdf](#)

7.3. FIRST READS

**7.3.1 BP 26-003 Cell Phones, Smartphones, Pagers, & Other
Electronic Signaling Devices DRAFT (Enc. No. 17)**

 [Enc. 17.docx.pdf](#)

 [BP 26-003 related_Smartphone Protocols_data collection analysis next steps.pdf](#)

 [BP 26-003 Cell Phones Smartphones Pagers Other Electronic Signaling Devices Policy \(rev. 05-2026\).pdf](#)

7.4. PUBLIC HEARINGS

8. CLOSED SESSION

8.1. ADJOURN TO CLOSED SESSION

8.2. **PERSONNEL (Government Code § 54957).** It is the intention of this governing body to meet in closed-session to consider public employee appointment/employment for the position of: 2025-26 After School Program Aide, 2025-26 Paraprofessional-Special Education, 2026-27 Core Academic Teacher, 2026-27 School Psychologist

8.3. **PERSONNEL (Government Code §54957).** It is the intention of this governing body to meet in closed session to consider the public employee performance evaluation for the position of: Superintendent.

9. **REGULAR SESSION RECONVENED**

9.1. **CALL PUBLIC SESSION TO ORDER**

9.2. **REPORT ACTION TAKEN IN CLOSED SESSION (if any)**

10. **ADJOURNMENT**

10.1. **Request for future Board Agenda items**

10.2. **The next The Academies CMO board meeting: June 11, 2026 at 6:30 PM.**

END
8:30pm



ENCLOSURE #1

ENCLOSURE SUMMARY

Consideration of Approval of Minutes of the board meeting on April 21, 2026.

FROM: Stacey Nelson

DATE: 5/19/2026

BACKGROUND: Draft board meeting minutes from the April 21, 2026 meeting.

SUPERINTENDENT'S RECOMMENDATION: Approve



TACMO BOARD MEETING

APRIL 21, 2026

Minutes



TUESDAY, APRIL 21, 2026

6:30 PM – 8:30 PM PDT

Sycamore Valley Academy (Multi-purpose Room) & Blue Oak Academy (Multi-purpose Room)

IN ATTENDANCE:

Mary Aceves, Karin Aure, Sheridyn Blain, Shauna Dolin, Omar Faris, Cristina Gutierrez, Marilou Monsivais, Corey Morse, Stacey Nelson, Staci Soares, Mackenzie Souza, Alex Tietjen, Claudia Van Groningen, Alexis Vance

1. OPENING BUSINESS

Others in attendance: Renee Boehme, Justine Esquivel, Janell Geiger McLaughlin, Jocelyn Hendershot, Cristina Johnson, Jackie Jones, Meagan Miller, Brooke Quiddam, Arturo Villasenor

1.1. CALL PUBLIC SESSION TO ORDER

Gutierrez called the meeting to order at 6:31 PM noting board member Craig Wheaton's absence.

1.2. ADA ACCOMMODATIONS

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There was no public comment on closed session topics this evening.

1.5. PUBLIC COMMENT ON ANY SCHOOL RELATED TOPIC

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There was no public comment on school related topics this evening.

2. CONSENT AGENDA

Gutierrez pulled item 2.6 from the consent agenda for a separate vote.

Items 2.1, 2.2, 2.3, 2.5, 2.5, and 2.7 were deemed approved by general consent. Faris moved to approve item 2.6 2026-27 VUSD TACMO Food Service Agreement; Monsivais seconded; Approved 5-0-1 with Gutierrez abstaining.

- 2.1.** Approval of Minutes of the board meeting on March 17, 2026 (Enc. No. 1)
- 2.2.** Approval of the March 2026 Check Register Report (Enc. No. 2)
- 2.3.** Monthly Attendance Reports for BOA and SVA (Enc. No. 3)
- 2.4.** 2024 Tax Returns and Form 990 - DRAFT (Enc. No. 4)
- 2.5.** 2026-27 TACMO TCOE Agency Agreement - ERS Library Media Services (Enc. No. 5)
- 2.6.** 2026-27 VUSD TACMO Food Service Agreement (Enc. No. 6)
- 2.7.** BR 25-005 Extending an Administrative Services Variable Term Waiver for Mackenzie Souza (Enc. No. 7)

3. PUBLIC RECOGNITION/PROCLAMATIONS/ACTION

- 3.1.** There are no Public Recognition/Proclamations items to include this evening.

4. COMMUNITY REPORTS

Presentation/Public Hearing/Public Comment/Board Discussion

4.1. Teacher Representative Report

4.1.1. Blue Oak Academy

Arturo Villasenor shared grade-level highlights emphasizing both academic growth and community engagement. TK students are focusing on science and cultural celebrations, including promotion rehearsal and Cinco de Mayo. Kindergarten is balancing academic rigor with community events such as a music performance and a field trip to Kaweah Oaks Preserve. First grade is preparing to showcase student work at the upcoming Open House. Second grade is completing a project-based learning unit with art demonstrations, while third grade students are developing proposals to support local communities. Fourth and fifth graders are studying human rights and advocacy, including the work of the United Farm Workers. Middle school students are engaged in a business math PBL, creating and presenting "Shark Tank"-style proposals and preparing pop-up businesses for the spring show. Spanish instruction continues to support grade-level PBLs, and the music program has rescheduled its performance due to weather.

Board members expressed appreciation for the creativity and real-world application of learning, particularly the business projects and student presentations.

4.1.2. Sycamore Valley Academy

Janell Geiger McLaughlin reported on end-of-year instructional focus areas by grade level. Kindergarten students are building independence and strengthening independent writing skills, including completing a PBL project with their eighth grade

buddies and creating a book. First grade is applying strategies learned throughout the year, while second and third grades are focused on building confidence and approaching challenges positively. Fourth and fifth graders are refining writing, deepening understanding, and preparing for a Yosemite field trip while practicing critical thinking and clear communication. Sixth grade is strengthening use of evidence and reasoning. Seventh and eighth grade math students have access to grade-level math content, while humanities students are connecting literature to real-world understanding through activities such as mock trial. Spanish instruction continues to build confidence and real-world language application, including a kinder buddy picnic. Janell emphasized maintaining high expectations while keeping students engaged and confident.

4.2. Principal Report

4.2.1. Blue Oak Academy (Enc. No. 8)

Staci Soares added to the teacher report by highlighting a fourth and fifth grade farm simulation activity, where students experienced scenarios reflecting migrant worker conditions, which had a strong impact on student understanding.

She reported on the recent TCOE charter oversight visit, noting it was more formal than in previous years and included leadership meetings, family and student focus groups, classroom observations, and file reviews. Initial feedback was positive, with praise for classroom environments and consistency across stakeholder input. A key area for growth identified was increasing rigor and acceleration. Soares noted the process felt more collaborative and partnership-focused than in the past.

Soares also gave a shoutout to teachers at both sites for their extensive work beyond classroom instruction, including report cards, conferences, testing, PBLs, and events. Board members expressed appreciation for staff efforts and acknowledged the demands of this time of year while encouraging staff to stay positive.

4.2.2. Sycamore Valley Academy (Enc. No. 9)

Corey Morse reported that instructional coaches have been leading foundational work in preparation for the 2026–27 school year, including developing a new teacher handbook. The work focuses on clearly outlining expectations, formalizing classroom processes, and organizing pacing, projects, field trips, and the overall school year to allow teachers to focus more on student learning. Staff have been actively involved in the process, creating a collaborative, site-based approach that supports alignment across grade levels. Morse also shared that CAASPP testing is beginning this week and that Open House is scheduled for the following evening, with food trucks supporting the event.

During discussion, board members expressed appreciation for the increased focus on planning and organizational structure. Morse noted that pacing guides are in development, with a goal of having a draft ready before summer, and that while some staff were initially hesitant, understanding the purpose has increased buy-in. Aure added that the work is centered on student outcomes and will remain a living document with ongoing refinement.

4.3. Operations Director Report

4.3.1. Visalia Rawhide Event

Claudia Van Groningen reported on a recent outreach event that, despite a date change, was well attended and successful. The event included support from 10 volunteers and 5 teachers, with coordination from the school nurse, Karin Aure, and the Esquivels, and featured the SVA choir. Approximately 2,500 attendees were present, and the team collected contact information from three prospective families. Outreach efforts included distributing promotional items and hosting a merchandise raffle, generating over \$200, including a \$120 donation from a supporter. Van Groningen noted strong community engagement and overall success of the event.

4.4. Human Resources Director Report

4.4.1. Return from FMLA and Re-engagement

Shauna Dolin reported her return from medical leave, expressing appreciation to the board for their support and for the flowers sent during her absence. She shared that a continuity plan was established prior to her leave and expressed gratitude to the team for stepping in to support HR functions. Dolin briefly outlined current focus areas and shared that she looks forward to continuing to support the organization.

4.5. Board Member Report

Blain: No report

Faris: No report

Tietjen: No report

Aceves: Shared highlights from recent field trips, noting the significant planning involved and the positive impact on students. She observed strong student excitement and engagement, including meaningful conversations during the Sacramento trip. She also referenced additional field trips to San Francisco and the upcoming Sugar Pine trip, expressing appreciation for the staff's efforts in providing these experiences.

Monsivais: No report

Gutierrez: Expressed appreciation for the exceptional work of staff across both school sites and the CMO office, emphasizing that the board values and cares for staff as well as students.

4.6. Superintendent Report

4.6.1. Annual conference for Board development

Aure facilitated a discussion on board development conference preferences, presenting options including the CSDC conference in Sacramento (November 16–18) and the CSBA conference in San Diego (December 3–5), with additional alternatives such as CCSA or SSDA. She noted that the organization is committed to investing in board development and will budget accordingly.

Board members discussed the benefits of each option, with several expressing interest in exploring CSDC for a new perspective while acknowledging the value of CSBA's board-focused content. The idea of alternating between conferences in different years received general support. Scheduling conflicts were noted for some

members. Aure supported the concept of alternating to maintain both governance-focused and charter-specific learning opportunities. Further information, including conference agendas, will be reviewed to inform a final decision.

4.6.2. Update on SVA Well and Facilities

Aure provided an update on a previously requested item regarding the site's well system. She reported that the well has been tested and is expected to last up to 50 years; however, it is currently an irrigation well and not suitable for potable water. Efforts are underway to convert it to a domestic well, though no timeline has been established. In the meantime, bottled water will continue to be provided at the site. Aure also shared that a summer project will include demolition of the old well, resulting in summer enrichment being relocated to BOA. During discussion, additional facility needs were raised, including issues with septic system overflow and the need for new leach lines. Staff noted ongoing communication with VUSD to address these concerns and continue coordination on the project.

4.6.3. Teacher voice and representation

Aure provided a follow-up on current practices for teacher engagement. She shared that the organization gathers regular feedback through teacher and employee experience surveys, includes teacher representatives on committees and the board, and holds monthly meetings with teacher representatives. Teachers are also involved in PTO activities and contribute to the development of the school calendar, ensuring ongoing opportunities for input and collaboration.

5. BOARD DEVELOPMENT

Presentation/Public Hearing/Public Comment/Board Discussion

5.1. Board Resources

5.1.1. There are no Board Resource items to include this evening.

6. ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

6.1. There are no Administrative Panel items to discuss this evening.

7. GENERAL AGENDA

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

7.1. PROGRAM UPDATES

7.1.1. Student Services: Empowering the TACMO Learner (Enc. No. 10)

Corey Morse, Renee Boehme, and Jackie Jones presented on student support systems aligned to the organization's mission and vision. Morse highlighted intervention services, including targeted reading support using the 95% curriculum, noting that approximately 90% of participating students demonstrated growth on

recent diagnostics. She emphasized the fluid nature of supports, with students exiting interventions upon reaching grade level.

Boehme, school psychologist, outlined the continuum of specialized services, including targeted pull-out support and related services such as occupational and behavioral support. She reported that 72% of annual IEP goals are being met and emphasized the importance of multidisciplinary assessments to better understand student needs.

Jones, mental health clinician, shared updates on mental health supports, including the use of the Open Parachute curriculum, counseling services, and partnerships with families and community organizations. The team emphasized a shift from reactive interventions to more preventative systems, as well as increasing in-classroom support from special education staff.

Board members expressed appreciation for the progress and noted visible improvements in student support systems and outcomes.

7.1.2. Student Retention: Strategic Action Update (Enc. No. 11)

Aure provided an update on the student retention strategic action, reviewing alignment to the organization's mission and vision and outlining progress from Year 1 and Year 2 action plans. She shared parent survey results and trends in unenrolled student numbers over recent years.

Aure discussed next steps, including development of Year 3 actions, continued action planning, and additional data collection. During discussion, she clarified that communication with families occurs through multiple channels, including classroom outreach, letters, email, and ParentSquare. Board members asked clarifying questions regarding communication methods and family-to-student ratios.

7.2. ACTION ITEMS

7.2.1. Monthly Financials Presentation (Enc. No. 12) ACTION

Meagan Miller, or Vertex Education, presented the board financial update, including the 2025–26 forecast summary, comparison of the current and previous forecasts, monthly cash balance, and accounts payable aging.

During discussion, clarification was provided that the ending fund balance reflects adjustments related to ELOP funding, with additional revenue resulting from reallocations, and that ELOP funding is designated for after-school programs. Monsivais moved to approve the monthly financials presentation; Aceves seconded; Approved 6-0-0.

7.2.2. Talk N' Roll Pediatric Speech Therapy Contract for Speech and Language Pathology Services (Enc. No. 13) ACTION

Aure requested to table this item until the May meeting while awaiting contract updates.

7.2.3. Enrichment Specialist Teacher Job Description Revision (Enc. No. 14) ACTION

Aure noted the addition to the Enrichment Specialist Teacher job description will provide more flexibility and openness.

Tietjen moved to approve item 7.2.3 Enrichment Specialist Teacher Job Description Revision and item 7.2.4 Paraprofessional-Special Education Job Description Revision; Blain seconded; Approved 6-0.-0.

7.2.4. Paraprofessional-Special Education Job Description Revision (Enc. No. 15)

ACTION

Approved with item 7.2.3 above.

7.3. FIRST READS

7.3.1. BR 26-002 Revised Articles of Incorporation to Meet New STRS Requirements (Enc. No. 16)

Aure reported on a CALSTRS compliance directive requiring several actions, including completion of a formal certification form, updates to corporate governing documents to ensure that any remaining assets upon dissolution are transferred to another public entity, and revisions to employee agreements to address compliance requirements by the January 27 deadline. Aure reviewed the changes made to meet these requirements. Gutierrez requested that key additions be clearly highlighted for board approval.

7.4. PUBLIC HEARINGS

8. CLOSED SESSION

8.1. ADJOURN TO CLOSED SESSION

Gutierrez adjourned to closed session at 8:40 PM.

8.2. PERSONNEL (Government Code § 54957). It is the intention of this governing body to meet in closed-session to consider public employee appointment/employment for the position of: Core Academic Teacher

8.3. PERSONNEL (Government Code §54957). It is the intention of this governing body to meet in closed session to consider the public employee performance evaluation for the position of: Superintendent.

9. REGULAR SESSION RECONVENED

9.1. CALL PUBLIC SESSION TO ORDER

Gutierrez reconvened public session at 9:10 PM.

9.2. REPORT ACTION TAKEN IN CLOSED SESSION (if any)

Gutierrez reported the board voted 6-0-0 with, Wheaton absent, to approve the following hires and appointments: Core Academic Teacher at Blue Oak Academy.

10. ADJOURNMENT

10.1. Request for future Board Agenda items

Blain requested a future agenda item to formalize the process for selecting teacher representatives, including defining the election process, terms, timeline, and roles, and documenting the process clearly in writing.

Tietjen requested a review of the field trip process including site selection and purpose.
Tietjen requested an overview of the current policy regarding staff AI usage noting what safeguards are in place.

Tietjen requested an update on the structure of the monthly financial presentation charts, noting that the schools are currently displayed as combined despite being separate entities.

10.2. The next The Academies CMO board meeting: May 19, 2026 at 6:30 PM.

Gutierrez adjourned the meeting at 9:10 PM.



ENCLOSURE #2

ENCLOSURE SUMMARY

Consideration of Approval of April 2026 Check Register Report

FROM: Stacey Nelson

DATE: 5/19/2026

BACKGROUND: Vertex Education's monthly report with all financial expenditures for the month of March.

SUPERINTENDENT'S RECOMMENDATION: Approve

Combined Board Check Register

School: TACMO

Month: April 2026



Total Paid By Check: \$ 266,290.81
Total Paid By Credit Card: \$ 7,509.43

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9616	Vertex Support Services, LLC	4/3/2026	Bill #CINV-00015170--HR SERVICES 3/21/26-4/15/26		\$ 3,000.00
Check	9617	Hidey Alvarez	4/3/2026	Bill #022826--Reimb: Mileage		\$ 78.30
Check	9618	Amazon Capital Services	4/3/2026	Bill #1MH7-L4PD-NJRC--Supplies Bill #11KF-N69X-741J--Supplies Bill #1XTK-3NNK-FLM3--Supplies Bill #1DDR-RTJC-JM1G--Supplies Bill #16HP-LHTG-LFKF--Supplies Bill #1TDH-V34Y-3C7P--Supplies Bill #1VP6-NQQF-H4PM--Supplies Bill #1VP6-NQQF-HCCD--Supplies Bill #1LWQ-XN4D-KNWL--Supplies Bill #1VHK-KD66-MPWJ--Supplies Bill #1R3F-4J93-JNXF--Supplies Bill #1KF1-KPRL-4NTN--Supplies Bill #1GMY-JQXY-DJNP--Supplies Bill #13NJ-PG9W-JL4L--Supplies Bill #1FD4-V3TC-KTKK--Supplies		\$ 827.69
Check	9619	Wendy Anderson	4/3/2026	Bill #031826--Reimb: Mileage		\$ 8.41
Check	9620	Cline's Business Equipment, Inc.	4/3/2026	Bill #279507--Contract Usage charge: 02/13 - 03/12/26 Bill #279341--Contract Usage charge: 02/13 - 03/12/26 Bill #279508--Contract Usage charge: 02/13 - 03/12/26		\$ 198.87
Check	9621	Cristina Kaviani-Johnson	4/3/2026	Bill #030626--Reimb: Dinner & Mileage		\$ 490.85
Check	9622	Stephanie Keck	4/3/2026	Bill #030526--Reimb: Dinner for Conference Attendance		\$ 267.80
Check	9623	Jacob Martinez	4/3/2026	Bill #031626--Reimb: Drama Production		\$ 165.48
Check	9624	Christina Nunez	4/3/2026	Bill #031826--Reimb: Mileage		\$ 4.21

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9625	ODP Business Solutions, LLC	4/3/2026	Bill #461864131001--Supplies Bill #455936987001--Supplies Bill #460006514001--Supplies Bill #460052686001--Supplies Bill #461709041001--Supplies Bill #458373802001--Supplies Bill #461405044001--Supplies Bill #461860443001--Supplies Bill #461271652001--Supplies Bill #458212033001--Supplies Bill #461864127001--Supplies Bill #458207122001--Supplies		\$ 940.80
Check	9626	Raptor Technologies, LLC	4/3/2026	Bill #INV244506--Books & Supplies		\$ 800.00
Check	9627	Sign Time	4/3/2026	Bill #95357--Business cards		\$ 141.05
Check	9628	The Stepping Stones Group LLC	4/3/2026	Bill #M0279325--Services: 02/15 - 02/28/26		\$ 48.30
Check	9629	Visalia Unified School District	4/3/2026	Bill #3873--Transportation Charges Due by 04/16/26		\$ 431.54
Check	9630	Alexis vance	4/3/2026	Bill #031626--Reimb: Mileage		\$ 47.74
Check	9631	Kings County Office of Education	4/8/2026	Bill #260982--KCOE New Teacher Induction Program Bill #260994--KCOE New Teacher Induction Program		\$ 34,000.00
Check	9632	A Plus Science & Supplies	4/8/2026	Bill #2023-703--Books & Supplies		\$ 275.00
Check	9633	Amazon Capital Services	4/8/2026	Bill #1X6R-9TR3-KQ96--Supplies Bill #1WLM-4K9J-1YKW--Supplies Bill #1VGW-KQNG-MV6V--Supplies Bill #1WQR-VWLL-6G13--Supplies Bill #1W76-MPXT-N9NF--Supplies Bill #1W6J-K6GL-L71P--Supplies Bill #1GPC-QDGH-KLQ3--Supplies		\$ 897.65
Check	9634	American Fidelity Assurance	4/8/2026	Bill #D954162--03/01 - 03/31/26 Flex Plan Liability Coverage		\$ 5,915.50
Check	9635	Foundation for Educational Administration	4/8/2026	Bill #ACSA-0000010685--Services: 03/01/26 Bill #ACSA-0000010043--Services: 02/01/26		\$ 1,366.86
Check	9636	Classic Charter, Inc.	4/8/2026	Bill #183426BAL--SVA 8th grade field trip to Magic Mountain on 6/2/2026 - Balance Due Bill #183448BAL--SVA field trip to CA State Capital on 4/14/2026 - Balance Due		\$ 6,227.25
Check	9637	Cline's Business Equipment, Inc.	4/8/2026	Bill #280011--IT Service: 03/23/26 Bill #279821--Contract Usage charge: 02/12 - 03/11/26 & Standard min charge Bill #280039--Contract Usage charge: 02/22 - 03/21/26 & Standard min charge		\$ 2,064.18
Check	9638	Krystal Eastman	4/8/2026	Bill #032726--Reimb: Exit Letter Shipping Cost for 100% BOA Staff & Mileage		\$ 164.85

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9639	Idea Printing & Graphics Inc.	4/8/2026	Bill #130643--Sped Green File Folder		\$ 146.48
Check	9640	Stacey Nelson	4/8/2026	Bill #032726--Reimb: Mileage		\$ 137.97
Check	9641	ODP Business Solutions, LLC	4/8/2026	Bill #463174074001--Supplies Bill #463207125001--Supplies Bill #463169411001--Supplies Bill #460374082001--Supplies Bill #460530992001--Supplies Bill #459603140001--Supplies Bill #460373930001--Supplies Bill #460374085001--Supplies Bill #460488131001--Supplies Bill #460535380001--Supplies Bill #463207532001--Supplies Bill #463174072001--Supplies		\$ 1,155.36
Check	9642	Sign Time	4/8/2026	Bill #95425--Digital Print Banner		\$ 447.56
Check	9643	Staci Soares	4/8/2026	Bill #031426--Reimb: Confernce Meals & Mileage		\$ 274.56
Check	9644	The Stepping Stones Group LLC	4/8/2026	Bill #M0280658--Services: 03/01 - 03/14/26		\$ 57.50
Check	9645	Visalia Unified School District	4/8/2026	Bill #3876--Transportation Charges Due by 04/16/26		\$ 1,512.90
Check	9646	Visalia Unified School District	4/8/2026	Bill #3874--Transportation Charges		\$ 3,274.76
Check	9647	WM Corporate Services Inc	4/8/2026	Bill #4996256-0165-7--Waste Svc : April 2026		\$ 1,021.91
Check	9648	EdTec	4/8/2026	Bill #CINV-00015319--EdTec Monthly - April 2026		\$ 16,275.00
Check	9649	CACHE	4/10/2026	Bill #040926--Deposit for 2026 TACMO Leadership Retreat		\$ 350.00
Check	9650	Wild Child Adventures	4/15/2026	Bill #3748--BOA TK Bubble Show and Mileage Fee		\$ 200.00
Check	9651	Self-Insured Schools of California	4/20/2026	Bill #April 2026--Billing Period: April 2026		\$ 80,758.75
Check	9652	Amazon Capital Services	4/20/2026	Bill #1GN3-KYQW-L7WW--Supplies Bill #14H6-Y9RH-1CHR--Supplies Bill #1M1J-DCK6-QJDJ--Supplies Bill #136X-1DLR-9RGQ--Supplies Bill #1PVH-MXQG-9W1Y--Supplies Bill #1F7Y-QKTM-1631--Supplies		\$ 306.78
Check	9653	American Fidelity Assurance	4/20/2026	Bill #2693987--09/30/26 Flex Plan Liability Coverage		\$ 620.00

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9654	Classic Charter, Inc.	4/20/2026	Bill #177718--Vehicle Charge Bill #177738--Vehicle Charge Bill #177724--Vehicle Charge Bill #177728--Vehicle Charge Bill #177191--Vehicle Charge Bill #177193--Vehicle Charge Bill #177727--Vehicle Charge Bill #177739--Vehicle Charge Bill #177188--Vehicle Charge Bill #177732--Vehicle Charge Bill #177719--Vehicle Charge Bill #177223--Vehicle Charge Bill #177723--Vehicle Charge Bill #177720--Vehicle Charge Bill #177740--Vehicle Charge		\$ 9,690.00
Check	9654	Classic Charter, Inc.	4/20/2026	Bill #177725--Vehicle Charge Bill #177729--Vehicle Charge Bill #177730--Vehicle Charge Bill #177726--Vehicle Charge Bill #177736--Vehicle Charge Bill #177721--Vehicle Charge Bill #177735--Vehicle Charge Bill #177192--Vehicle Charge Bill #177189--Vehicle Charge Bill #177219--Vehicle Charge Bill #177220--Vehicle Charge Bill #177731--Vehicle Charge Bill #177221--Vehicle Charge Bill #177190--Vehicle Charge Bill #177737--Vehicle Charge		Cont'd
Check	9655	Cline's Business Equipment, Inc.	4/20/2026	Bill #280581--Contract Usage charge: 03/01 - 03/31/26 Bill #280449--Contract Usage charge: 03/01 - 03/31/26		\$ 1,500.07
Check	9656	Eric Armin Inc	4/20/2026	Bill #INV1467827--Materials & Supplies		\$ 448.95
Check	9657	ODP Business Solutions, LLC	4/20/2026	Bill #463174073001--Supplies Bill #461011849001--Supplies Bill #462783714001--Supplies Bill #464184786001--Supplies Bill #461998472001--Supplies Bill #460593158001--Supplies		\$ 1,100.91
Check	9658	PresenceLearning, Inc.	4/20/2026	Bill #INV87888--SLP Svcs: Weekly Dedicated OT & SLP Hours		\$ 19,701.76
Check	9659	Rosenberg Cassady LLP	4/20/2026	Bill #90--Services: 03/03 - 03/30/26		\$ 1,085.00

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9660	The Stepping Stones Group LLC	4/20/2026	Bill #M0281979--Services: 03/15 - 03/28/26		\$ 172.50
Check	9661	Tulare County Superintendent of Schools	4/20/2026	Bill #262821--Chaperone Admission Bill #262908--SCICON 6th Grade Week Trip Bill #262792--2025-26 ERS Library Media Services		\$ 14,298.92
Check	9662	Lauren Ventura	4/20/2026	Bill #041226--Reimb: Mileage		\$ 200.46
Check	9663	William V. Macgill & Co.	4/20/2026	Bill #IN0921135--Table Paper Crepe		\$ 21.50
Check	9664	EdTec	4/20/2026	Bill #CINV-00015482--Postage Bill back		\$ 73.42
Check	9665	Serina Chao-Alonzo	4/20/2026	Reissue of payroll check 11902		\$ 418.78
Check	9666	Chrissy Gartung	4/22/2026	Reissue of payroll check 12055		\$ 3,223.62
Check	9667	Chrissy Gartung	4/22/2026	Reissue of payroll check 12056		\$ 3,223.62
Check	9668	Investors Property Management	4/23/2026	Bill #May 2026--TACMO Home Office Monthly Rent		\$ 1,000.00
Check	9669	Big L Ranch	4/23/2026	Bill #050126--BOA 2nd grade field trip on 5/1/2026		\$ 510.00
Check	9670	Lindsay High School T&F	4/23/2026	Bill #042326--Tulare County Youth Championships Track Meet on 4/25/26		\$ 190.00
Check	9671	Cline's Business Equipment, Inc.	4/27/2026	Bill #280973--Contract Usage charge: 03/13 - 04/12/26 Bill #280972--Standard min charge Bill #280974--Contract Usage charge: 03/13 - 04/12/26		\$ 163.17
Check	9672	Hidey Alvarez	4/27/2026	Bill #033126--Reimb: Mileage		\$ 104.40
Check	9673	San Joaquin County Office of Education	4/27/2026	Bill #251035--EDJOIN Account Fees - One Year Term See Service agreement for details		\$ 1,850.00
Check	9674	TargetSuccess, Inc.	4/27/2026	Bill #1929--Teacher Sketch Annual Subscription March 2026 to March 2027		\$ 1,200.00
Check	9675	Classic Charter, Inc.	4/27/2026	Bill #177196--Vehicle Charge Bill #177741--Vehicle Charge Bill #177744--Vehicle Charge Bill #177745--Vehicle Charge Bill #177742--Vehicle Charge Bill #177743--Vehicle Charge Bill #177197--Vehicle Charge Bill #177746--Vehicle Charge		\$ 2,584.00
Check	9676	Enome, Inc	4/27/2026	Bill #2418856-2--Partial District Membership - Goalbook Toolkit access		\$ 5,150.00
Check	9677	TCG Administrators, a HUB International Company	4/27/2026	Bill #188444--Monthly Administration Fees		\$ 28.00
Check	9678	Amazon Capital Services	4/27/2026	Bill #1RCR-4JYL-D1YF--Supplies Bill #1RHM-4DLL-YH64--Supplies Bill #1TJL-PCML-6QCX--Supplies Bill #1TJL-PCML-DP6W--Supplies Bill #1K9M-7LJ3-DCW3--Supplies		\$ 335.76
Check	9679	J&D Lighting & Alarm	4/27/2026	Bill #420688--Intrusion Monitoring; 05/01 - 07/31/26		\$ 125.52
Check	9680	Imagine Learning LLC	4/27/2026	Bill #1131972--IS teaching/sem (18 week) : 01/09/26		\$ 1,625.00

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	9681	Christa Pilgrim	4/27/2026	Bill #031026--Reimb: Fingerprints		\$ 74.54
Check	9682	Janell Geiger-Mclaughlin	4/27/2026	Bill #041426--Reimb: Field Trip to the Museum		\$ 565.00
Check	9683	ODP Business Solutions, LLC	4/30/2026	Bill #463960683001--Supplies Bill #463940375001--Supplies Bill #463960689001--Supplies		\$ 462.64
Check	9684	CACHE	4/30/2026	Bill #117--Upstairs Rental: 06/09 - 06/11/26		\$ 2,100.00
Check	9685	Cline's Business Equipment, Inc.	4/30/2026	Bill #279686--IT Service: 03/16/26 Bill #276100--Contract Usage charge: 12/12/25 - 01/11/26 & Standard min charge		\$ 1,273.90
Check	9686	Classic Charter, Inc.	4/30/2026	Bill #177748--Vehicle Charge Bill #177750--Vehicle Charge Bill #177753--Vehicle Charge Bill #177749--Vehicle Charge Bill #177751--Vehicle Charge Bill #177747--Vehicle Charge Bill #177199--Vehicle Charge Bill #177752--Vehicle Charge Bill #177754--Vehicle Charge Bill #177198--Vehicle Charge		\$ 3,230.00
Check	9687	Foundation for Educational Administration	4/30/2026	Bill #ACSA-0000011794--Services: 04/01/26		\$ 683.43
Check	9688	American Fidelity Assurance	4/30/2026	Bill #D963190--04/01 - 04/30/26 Flex Plan Liability Coverage		\$ 5,969.82
Check	9689	Amazon Capital Services	4/30/2026	Bill #17QV-6639-NL7Q--Supplies Bill #1NG1-V3PN-NJRM--Supplies Bill #1XMG-TPWW-MR7C--Supplies Bill #1NG1-V3PN-N7FR--Supplies Bill #1DML-JRXD-FQNJ--Supplies Bill #17Q3-VFGW-N9WG--Supplies		\$ 874.82
Check	9690	David Britter	4/30/2026	Bill #042026--Reimb: Supplies for WIN Cookie Project & Batteries for scales		\$ 49.72
Check	DB040326	Employers Insurance	4/3/2026	DB040326 - Worker's Comp payroll & premium charges		\$ 5,811.60
Check	DB040626	LEAF Capital Funding, LLC	4/6/2026	DB040626 - Monthly copier service		\$ 457.99
Check	DB040826	SoCalGas	4/8/2026	DB040826 - TACMO home office monthly gas bill		\$ 39.22
Check	DB041326	Christine Olvera	4/13/2026	DB041326 - TACMO home office weekly cleaning		\$ 50.00
Check	DB041326-1	Southern California Edison	4/13/2026	DB041326-1 - TACMO home office monthly electricity bill		\$ 132.28
Check	DB041326-2	LEAF	4/13/2026	DB041326-2 - Monthly copier service		\$ 388.48
Check	DB041526	Cardmember Service	4/15/2026	DB041526 - TACMO monthly credit card bill		\$ 7,509.43
Check	DB042026	Christine Olvera	4/20/2026	DB042026 - TACMO home office weekly cleaning		\$ 50.00
Check	DB042026-1	LEAF Capital Funding, LLC	4/20/2026	DB042026-1 - Monthly copier service		\$ 211.64
Check	DB042226	CALIFORNIA DEPARTMENT OF TAX AND FEE ADMINISTRATION	4/22/2026	DB042226 - 2026 CA Environmental Fee		\$ 1,379.08

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.



ENCLOSURE #3

ENCLOSURE SUMMARY

Consideration of Approval of Monthly Attendance Reports for BOA and SVA

FROM: Wendy Anderson & Joy George

DATE: 5/19/2026

BACKGROUND: Monthly attendance reports pulled from PowerSchool for each school site.

SUPERINTENDENT'S RECOMMENDATION: Approve

Attendance Summary By Grade

Blue Oak Academy
03/23/2026 to 04/17/2026 = 14 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
-1	40	0	0	0	40	560	0	0	55.00	505.00	36.07	90.18%
0	48	0	0	0	48	672	0	0	53.00	619.00	44.21	92.11%
Subtotal	88	0	0	0	88	1232	0	0	108.00	1124.00	80.28	91.23%
1	53	0	0	0	53	742	0	0	43.00	699.00	49.93	94.20%
2	51	0	0	0	51	714	0	0	45.00	669.00	47.79	93.70%
3	54	0	0	0	54	756	0	0	46.00	710.00	50.71	93.92%
Subtotal	158	0	0	0	158	2212	0	0	134.00	2078.00	148.43	93.94%
4	39	0	0	0	39	546	0	0	39.00	507.00	36.21	92.86%
5	43	0	0	0	43	602	0	0	34.00	568.00	40.57	94.35%
6	38	0	0	0	38	532	0	0	15.00	517.00	36.93	97.18%
Subtotal	120	0	0	0	120	1680	0	0	88.00	1592.00	113.71	94.76%
7	38	0	0	0	38	532	0	0	24.00	508.00	36.29	95.49%
8	44	0	0	0	44	616	0	0	31.00	585.00	41.79	94.97%
Subtotal	82	0	0	0	82	1148	0	0	55.00	1093.00	78.08	95.21%
Grand Total	448	0	0	0	448	6272	0	0	385.00	5887.00	420.50	93.86%

To the best of my knowledge,
the above attendance information is correct.

Signed _____

Date _____

Report Calculations

$((\text{Carry Fwd} + \text{Gain} - \text{Mult. Gain}) \times \text{School Days}) = \text{Actual Days}$

$\text{Actual Days} - (\text{Off Track} + \text{Days N/E} + \text{Days Absent}) = \text{Days Attd}$

$[\text{Days Attd} / (\text{Actual Days} - \text{Off Track} - \text{Days N/E})] \times 100 = \text{ADA\%}$

[Note: Multiple gains are for students that entered more than one time during the report time span.]

Attendance Summary By Grade

Sycamore Valley Academy
03/23/2026 to 04/17/2026 = 14 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
-1	24	0	0	0	24	336	0	0	37.00	299.00	21.36	88.99%
0	39	0	0	0	39	546	0	0	37.00	509.00	36.36	93.22%
Subtotal	63	0	0	0	63	882	0	0	74.00	808.00	57.72	91.61%
1	45	0	0	2	43	630	0	17	35.00	578.00	41.29	94.29%
2	41	0	0	0	41	574	0	0	38.00	536.00	38.29	93.38%
3	43	0	0	0	43	602	0	0	54.00	548.00	39.14	91.03%
Subtotal	129	0	0	2	127	1806	0	17	127.00	1662.00	118.72	92.90%
4	45	0	0	0	45	630	0	0	27.00	603.00	43.07	95.71%
5	44	0	0	0	44	616	0	0	31.00	585.00	41.79	94.97%
6	47	0	0	0	47	658	0	0	44.00	614.00	43.86	93.31%
Subtotal	136	0	0	0	136	1904	0	0	102.00	1802.00	128.72	94.64%
7	41	0	0	0	41	574	0	0	43.00	531.00	37.93	92.51%
8	43	0	0	1	42	602	0	14	49.00	539.00	38.50	91.67%
Subtotal	84	0	0	1	83	1176	0	14	92.00	1070.00	76.43	92.08%
Grand Total	412	0	0	3	409	5768	0	31	395.00	5342.00	381.59	93.11%

To the best of my knowledge,
the above attendance information is correct.

Signed Joy George

Date 07/14/26

Report Calculations

((Carry Fwd + Gain - Mult. Gain) X School Days) = Actual Days

Actual Days - (Off Track + Days N/E + Days Absent) = Days Attd

[Days Attd / (Actual Days - Off Track - Days N/E)] X 100 = ADA%

[Note: Multiple gains are for students that entered more than one time during the report time span.]



ENCLOSURE #4

ENCLOSURE SUMMARY

Principal Report for Blue Oak Academy

FROM: Staci Soares

DATE: 5/19/2026

BACKGROUND: Monthly Principal Report for Blue Oak Academy including Student Data, Academic and Instructional updates, Extracurricular updates, Operational updates, Community Engagements & Partnerships, and Upcoming Events.

TACMO Board Meeting - Principal Report

FROM: Staci Soares, Principal

DATE: May 13, 2026

RE: Monthly Report



Student Data

- 2026-27 Applications - 255
- 2026-27 Waitlist - 160

Academic and Instructional Updates

- CAASPP/CAST state testing will be completed by Friday, 5/15.
- On Monday, May 4, staff participated in a minimum day professional development session focused on reflection, collaboration, and future planning. Teachers reflected on the Project-Based Learning experiences implemented throughout the school year, celebrating successes while also identifying areas for growth and refinement. Staff reviewed curriculum resources and engaged in collaborative discussions regarding instructional strengths, challenges, and opportunities for improvement as we begin planning for the 2026-27 school year.

Extracurricular Updates

- Elementary and Middle School Reading Revolution groups proudly brought home awards from their TCOE competitions. Additionally, students across multiple grade levels participated in TCOE's Poetry and Prose competition, with many students earning high marks and recognition for their performances.
- Our Elementary (4/23) and Middle School (5/4) music performances were a tremendous success and showcased the talents and hard work of our students. The elementary performance also featured middle school Shark Tank booths as a culminating event connected to their Trimester 3 Project-Based Learning experience. Remaining Shark Tank projects will also be highlighted during Open House on May 13.
- Open House will feature Blue Oak's 2nd Annual Art Showcase, highlighting student artwork and projects created throughout the year. Select pieces will be available for purchase, with proceeds supporting enrichment art supplies and student activities for the upcoming school year.
- 2nd and 3rd grades participated in meaningful and engaging field trips connected to classroom learning and CA standards. Third grade students visited Chuck E.

Cheese to participate in STEAM related activities focused on different forms of energy. Third grade students also visited In-N-Out Burger to learn about business operations and food safety practices, an experience that connected directly to informational writing instruction. Second grade students visited Big L Ranch where they explored the pollination cycle through hands-on learning experiences that reinforced grade level science standards.

- Our Spring Carnival was another major success, bringing together families and staff through classroom booths, local food vendors, games, and student performances.
- Teacher Appreciation Week provided an important opportunity to recognize and celebrate the incredible dedication of our entire staff, including both certificated and classified employees, for the meaningful work they do each day to support our students and school community.

Upcoming Events

- 5/18 - Volunteer breakfast. All board members are invited!
- 5/20 - Talent show
- 5/22 - Science day
- 5/26-5/29 - 6th grade to SCICON
- 5/26-5/29 - TK conferences
- 5/29 - May awards assembly
- 6/2 - Middle School sports awards
- 6/3 - Water day
- 6/4 - 8th grade promotion
- 6/5 - TK promotion
- 6/5 - Kinder program



ENCLOSURE #5

ENCLOSURE SUMMARY

Principal Report for Sycamore Valley Academy

FROM: Corey Morse

DATE: 5/19/2026

BACKGROUND: Monthly Principal Report for Sycamore Valley Academy including Student Data, Academic and Instructional updates, Extracurricular updates, Operational updates, Community Engagements & Partnerships, and Upcoming Events.

TACMO Board Meeting - Principal Report

FROM: Corey Morse, Principal
DATE: 5/19/2026
RE: Monthly Report



Academic and Instructional Updates

We are rounding out the school year by grading the final genre on-demand writing. Staff have noticed a significant increase in writing production and proficiency. This is largely attributed to the focused instructional effort with clear guidelines and assessment cadence.

Additionally, on May 4th, we had an opportunity to engage again with Joseph Lamb from TCOE. He has been instrumental in providing professional learning to staff around math instruction. We intend to continue to build on the momentum going into the 26-27 school year. Staff will have materials ahead of summer break for planning purposes.

Jackie Jones, our mental health clinician, has been working with a student leadership group, prepping and distributing mental health awareness materials. All teachers have resources at hand and are focusing on teaching the value of being kind to our minds. This looks like coping and support skills for students and staff.

Extracurricular Updates

During the recent end-of-the-year staff picnic, SVA was victorious in the BOA vs SVA kickball game. The trophy returned. Our record is 2-1-1.

Community Engagement & Partnerships

We have had the same officers serving the PTO for several years. For the upcoming year, there are several new faces joining the PTO. Jennifer Denham serves as the teacher liaison and has been actively recruiting. Thank you to Jennifer and to all of those who serve PTO. We are very grateful for their fundraising and support efforts!

Upcoming Events

5/22- Talent Show
5/22- Explorer Games winning classes to Roller Towne
5/26 & 5/27- TK Conferences
5/27- Trimester 3 music performance (TK/K) 8:20 + Middle School band and choir End of the Year performance 9:00
5/28- Habit of a Scholar and Explorer of the Month Awards 8:15-9:15
6/2- 8th-grade trip to Magic Mountain
6/5 @9:00- SVA 8th grade promotion ceremony



ENCLOSURE #6

ENCLOSURE SUMMARY

Sycamore Valley Academy, Blue Oak Academy, and The Academies Charters website improvements update

FROM: Claudia Van Groningen

DATE: 5/19/2026

BACKGROUND: The Academies manage three websites with mobile and desktop applications. These sites serve multiple purposes, including compliance, internal communication, external communication, and marketing. This report provides an overview of current year improvements, as well as those planned for the coming school year.



Operations Report

Websites

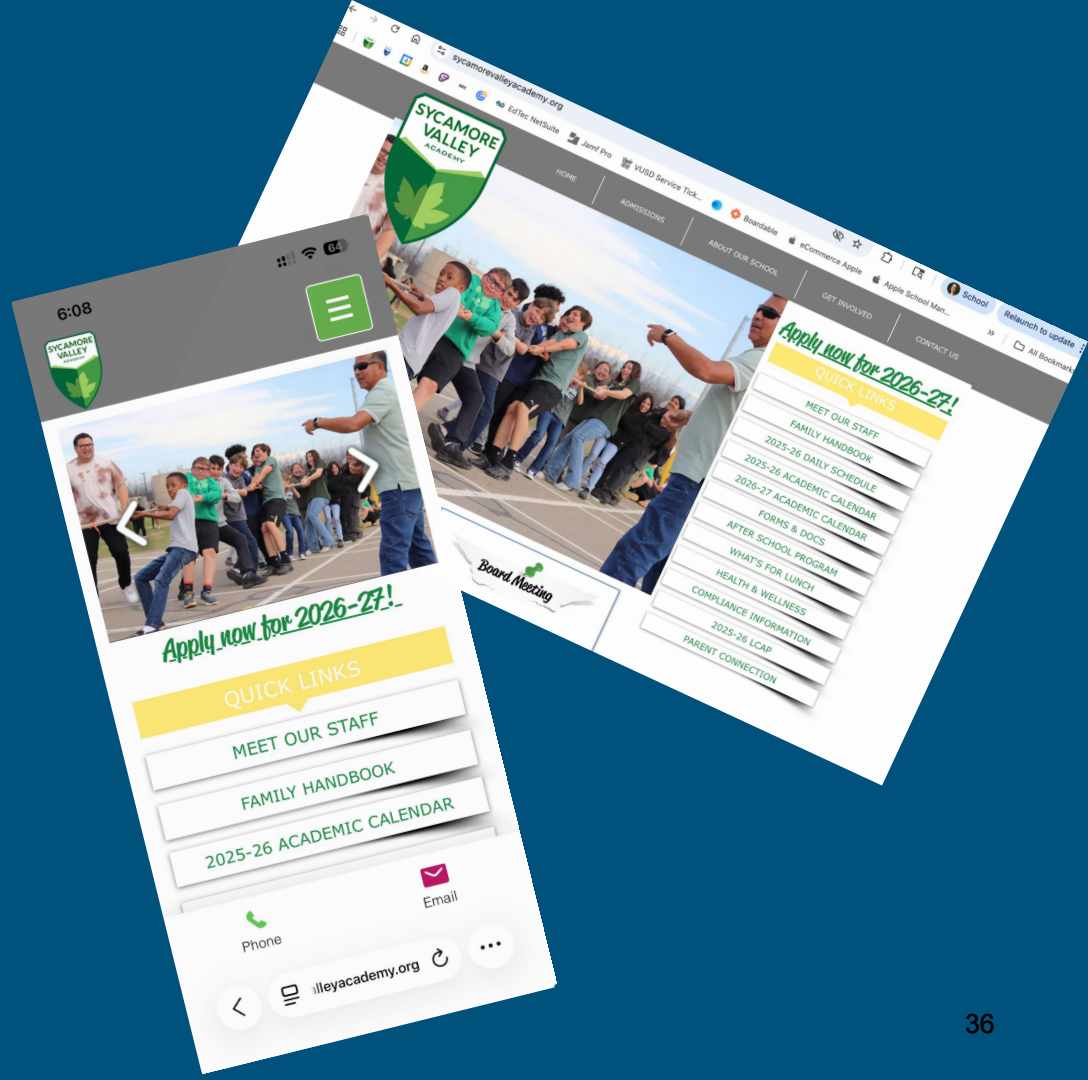


Background

Three distinct websites:

- sycamorevalleyacademy.org
The Original, since 2010
- blueoakacademy.org
Copied in 2016
- theacademiescharters.org
Copied/built in 2016

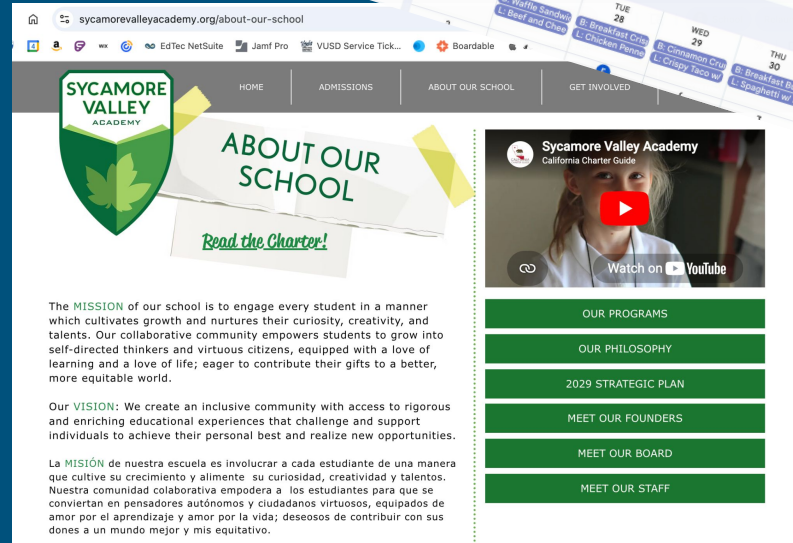
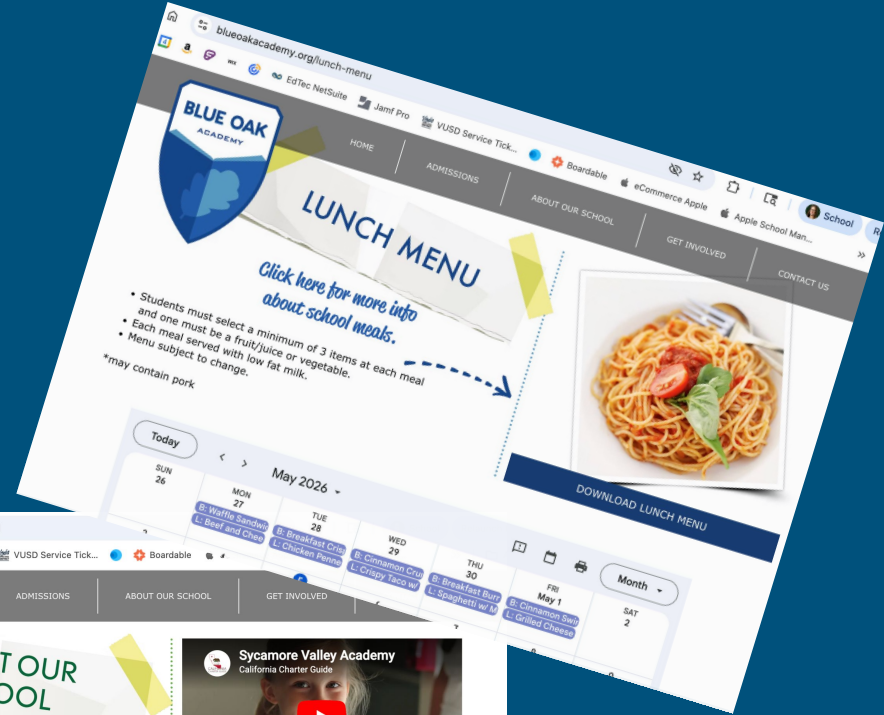
Or is it SIX?



Function

Three distinct purposes:

- Compliance
- Internal Communications
- External Communications/Marketing



Improvements in 2025-26

Compliance and Accountability Focus

- Changes in authorizer engagement
- New Compliance Page - serves as a hub and an archive
- More transparency - added Board Policies and past meeting agenda packets

Staff Profile Pages

- Historical practice revived
- Belonging and connection
- Hefty lift, but Fun!
 - 37 down, 36 to go!

The screenshot shows a staff profile page for Ms. Denham. At the top, there is a navigation bar with links for HOME, ADMISSIONS, ABOUT OUR SCHOOL, GET INVOLVED, and CONTACT US. The Sycamore Valley Academy logo is on the left. The main heading reads "MEET MS. DENHAM" next to a photo of Ms. Denham. Below the photo is a button that says "Email Ms. Denham". To the right, under the heading "Check Out These Fun Facts!", there is a list of personal details: Job at SVA: Instructional Coach; Favorite Word: Conundrum; Favorite Color: Yellow; Favorite Beverage: Coffee; Favorite Snack: Kind Bars; Favorite Local Restaurant: Figaros; Wanderlust Destination: Thailand. Below this is a quote: "Failure is instructive. The person who really thinks learns quite as much from his failures as from his successes." - John Dewey. At the bottom, there is a paragraph of text about Ms. Denham's background and a small note about her experience prior to joining SVA.

Corrections/Updates

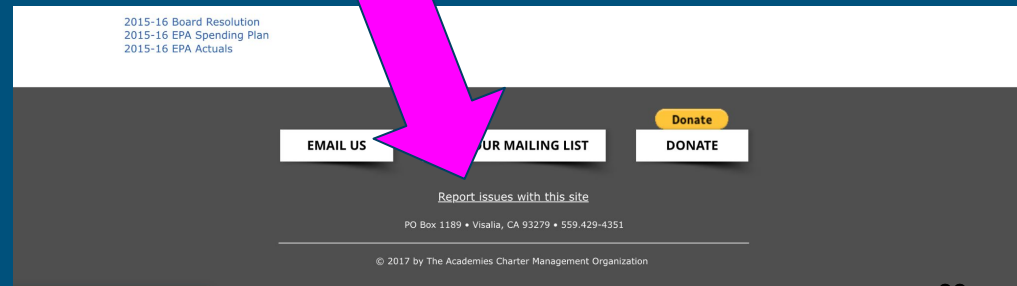
Constantly being edited/updated:

- Monthly - lunch menus, meeting agendas, etc.
- Annually - calendars, handbooks, compliance docs, staff changes, etc.
- As Needed - new requirements, name changes, etc.

Where to go with suggestions/corrections?

claudia@theacademiescharters.org

helpdesk@theacademiescharters.org



Next Steps

2025-26

- “Finish” Staff Profile Pages
- Focus on Consistency across desktop and mobile sites
- Continue to spread the word about reporting issues to me when they come up

2026-27

- Explore options for future redesign/rebuild
- Explore document archive option



ENCLOSURE #7

ENCLOSURE SUMMARY

Field Trip Development and Approval Process - Review

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: At our previous Board meeting there was a request to share and review our current field trip development and approval process. The following enclosures provide an overview of our current process, including our planning protocol and approval process. Time has been scheduled this summer to review the protocol to strengthen the alignment of field trips with our charter purpose and to ensure appropriate planning for successful implementation. The review team will consist of the Superintendent, the Administrative Manager, and two site administrators, at a minimum.

Field Trip Protocol-Planning-Process

Planning

- Grade Level Teams should plan their field trips at the start of each trimester.
- Book your field trip with location/vendor.
- Request Invoice for admission payment: (Turn this into the Admin Manager)
 - Turn around time for check payments by invoice is typically two to three weeks
 - If a Purchase Order is required, contact the Administrative Manager.
 - Administrative Manager will confirm with the Teacher when invoice(s) is received.
- Prepare to schedule your field trip:
 - **30 Days Prior** to Field Trip Date
 - Have date and time frames
 - Admission Costs/Estimates/Payments Ready
 - Complete Itinerary (make a copy of the [Itinerary TEMPLATE Doc](#) and place in your own drive)
 - Bus Transportation Estimate Amount (use [Bus Transportation Estimate Sheet](#))
 - Create a list of students not attending and which classroom they will be reporting to on the day of the trip. Give this list to the Office Assistant on the day of the trip.
 - Make plans for students to be supported on campus in another classroom.

Approval & Scheduling

1. Submit Field Trip request(s) using the [Field Trip Request Form](#).
 - Minimum 30 Days in Advance of actual field trip date
 - Need to upload completed itinerary (use to complete the Google Form)
 - Enter estimated **TOTAL COST**
 - Admission Cost
 - Bus Transportation cost
 - All other field trip expenses
 - Ensure **“Purpose of Trip”** covers PBL and/or Standard(s) this trip is supporting
2. Once submitted, an approval email will be sent to the site Principal.
 - Admin & Office staff **only**: [Field Trip Approval & Transportation Request Process](#)
3. When field trip is approved, a folder for the field trip and the following docs will be created and placed in the folder:
 - Classroom Tracking Sheet (Copy and Paste your students' names)
 - Student Permission Form
 - Volunteer Chaperone Form
 - Staff Field Trip Permission Request & Agreement
 - VUSD Transportation Form (for bus requests)
 - TACMO Use of Private Vehicle Request Form (for private auto requests)
 - Folder is in [TACMO Resource Bank > 03. Field Trips Tracking & Process > Field Trips](#)

4. Teachers and hourly staff must **create an absence in Frontline** to match the hours of the field trip using the absence reason: TACMO Activities > Paid Staff Time. Note the field trip in the “notes” section, and indicate whether a substitute will be needed.
5. Create a calendar event on the school site's Google “Events” Calendar for the date of the field trip and invite the Office Assistant, Health Aide/LVN, Principal, & Vice Principal.
6. **Connect with site Health Staff about health needs of students attending the field trip.**
7. Field Trip Transportation for VUSD buses will be booked (*Admin Manager to send email to VUSD*). The site Office Assistant will follow up with VUSD for bus confirmation status.
 - Bus request status can be found in [Field Trips Request Form \(Responses\)](#) G-Sheet (*scroll far right, check for the column heading “Booked” and look for an “X”*). If the full Row for the request is highlighted in grey, it is fully booked and ready.
 - **Private Auto requests** will need a [Use of Private Vehicle Request Form](#) to be completed by the Employee/Chaperone who will be transporting the student(s). For employees/chaperones to transport students (*who are not their own*), the field trip must require that only private autos are being utilized (*no buses needed*) and/or buses are unavailable and the proper permission forms are completed and signed by parents of the transported students prior to the trip. Otherwise, all students must travel by bus transportation. For chaperones transporting their own students, a [Use of Private Vehicle Request Form](#) is still required.
 - **Charter Bus requests** and quotes will be managed by the site Office Assistant.
8. **If your trip is canceled/moved/modified, notify Admin Manager and Front Office ASAP, so the bus(es) can be canceled/modified in advance to avoid cancellation fees.**

Preparing & Tracking

1. Use the Classroom Tracking Sheet to track student permission forms, chaperones, and staff attending the field trip.
2. **Student Permission Forms, Volunteer Chaperone Forms** must go home **15 days prior** to field trip, not including weekends and student non-attendance days.
 - Decide on an appropriate number of volunteer chaperones for the trip. Communicate clearly with families the requirements to be a chaperone and the process for choosing the volunteers (*everyone who meets requirements can go, number of chaperones is limited and there will be a lottery, chaperones will need to pay their own way, etc.*)
 - **Direct families to the Front Office to get started.** Chaperones must turn in all required paperwork to the Office Assistant in the Front Office at least **15 days prior** to the field trip.
 - All **Chaperones** attending the field trip **MUST BE FINGERPRINTED & have a VOLUNTEER APPLICATION FORM on file 15 days prior** to the trip date.
 - Volunteer Applications and LiveScan Fingerprinting forms are available with the Office Assistant in the Front Office.
 - Teacher will need to check in with the Office Assistant on the status of their volunteer chaperone clearance OR provide a list of the chaperone's to the Office Assistant in advance if they would like status updates sent from the office.
3. All forms are due **10 days prior** to field trip.

4. Send a list of all Volunteers, including Staff, to the Site Principal **10 days prior** to field trip.
5. **Staff Field Trip Permission Request & Agreement** needs to be completed and approved by supervisor and site principal for any hourly staff chaperones (*i.e. Aides*) **10 days prior** to field trip and an absence request needs to be added in Frontline (*under TACMO Activities > Paid Staff Time*) for their regular schedule hours. Hours worked while on the field trip outside of their regular scheduled hours will be added to their timesheet by their supervisor.
6. **Connect with Health Aide/Nurse about health needs of students attending the field trip.**
 - Give Health Staff a copy of the **Student Permission Form**, (for students with health needs) so they can prepare medication for the trip
 - **DO THIS IMMEDIATELY after all forms are collected, 10 days prior** to field trip
 - COVID testing may be required prior to the field trip; check in with the Front Office for current guidelines.
7. Field Trip Lunch Request and list of students requesting a sack lunch from the cafeteria submitted to VUSD Lunch Attendant at least **14 days prior** to field trip.
8. Gather all **Student Permission Forms, Volunteer Chaperone Forms, Staff Field Trip Permission Request & Agreement.**
9. **Volunteer Chaperone and Staff Field Trip Forms** and all other docs (*driver/chaperone forms, license/insurance copies, vaccine card/negative test results, etc.*), given to Administrative Manager **prior to Field Trip** (*CMO mailbox is with the Office Assistant in the Front Office.*)

Day of the Field Trip

1. Print the *Class Roster* and *Student Sign Out Sheet* from the **Class Tracking Sheet** and place it on top of the gathered **Student Permission Forms** and must be taken on the field trip. Give the list of students not attending to the Office Assistant.
2. Make sure you have made care plans for the students not attending and the office & teachers know where to send these students.
3. Use *Class Roster* to take attendance.
4. **STUDENTS MUST RIDE ON THE BUS TO THE FIELD TRIP.** Parents are not allowed to take their student to the Field Trip.
5. **PARENTS MUST SIGN THEIR STUDENT OUT**, If parents want to take their student home from the Field Trip.

After the Field Trip

1. **All original forms** taken on the field trip Class Roster, Student Sign Out Sheet, and Student Permission Forms must be turned in to the Administrative Manager (CMO office). It is preferable to have all teachers/classes that participated in one field trip turn in their paperwork together.

Quick Field Trip Summary

Planning

- Team planning start of every Trimester
- Book and begin process for payment
- Set Dates and Times
- Admission Costs
- Bus Estimate
- Itinerary Ready
- List of Students attending/not attending



Approval & Scheduling

- Complete Field Trip Request Form
- Submit MINIMUM 30 Days in Advance of Field Trip
- Approval Email Sent
- Field Trip folder and docs created
- Create paid Frontline absence during Field Trip hours
- Create G-Calendar Invite for OA, Health, & Admin
- **Connect with site Health Staff about student health needs**
- Transportation Scheduled



Preparing & Tracking

- Send all forms home/to staff attending 3 weeks before field trip
- Collect all forms 2 weeks before field trip
- **Connect with site Health Staff about student health needs**
- Make sure Volunteers are **FINGERPRINTED**
- All Staff Attending are approved to attend
- Submit Lunch count to VUSD Lunch Attendant 1 week before field trip
- Submit all Chaperone and Staff Forms to AA prior to field trip



Day of the Field Trip

- Take Class Roster and Student Sign Out Sheet (In Classroom Tracking)
- Give list of students not attending to the Office Assistant
- Take Attendance on class roster
- Take Permission Slips
- Student Must Ride Bus/Transportation to the Field Trip
- Parent Must Sign Out Student if not returning to school on the bus



After the Field Trip

- Turn in all docs Class Roster, Sign Out Sheet, and Student Permission Slips to AM (CMO office)



ENCLOSURE #8

ENCLOSURE SUMMARY

TCOE Annual Oversight Reports for Blue Oak Academy and Sycamore Valley Academy

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: Tulare County Office of Education provided the following reports for the annual oversight of Blue Oak Academy and Sycamore Valley Academy. The report details the review process and participants, student and staff demographics, fiscal accountability, governance, operational management, educational program, commendations, recommendations, and executive summaries.

Tulare County Office of Education

Tim A. Hire, County Superintendent of Schools

Blue Oak Academy

Annual Oversight Report

2025-2026

Authorizing Agency:

Tulare County Office of Education

Tim A. Hire, County Superintendent of Schools

**Blue Oak Academy
Annual Oversight
2025-26**

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Blue Oak Academy Annual Oversight

INTRODUCTION

Review Process and Participants

The Tulare County Office of Education (TCOE) Leadership Support Services (LSS) conducted the 2025–26 Annual Oversight Review for Blue Oak Academy (BOA) utilizing a collaborative oversight framework designed to ensure compliance, promote transparency, and support continuous improvement. The review process included document submission and comprehensive desk review, followed by site-based activities, observation of governing board meetings, and ongoing communication between the charter school and the authorizing agency. This structured approach allowed for the examination of fiscal, operational, and instructional practices while maintaining an open and constructive partnership throughout the process.

The LSS charter oversight team consisted of Karen Costa, LSS Administrator; Jesse Sanchez, LSS Administrator; and Christina Loya, Fiscal Program Development and Support Coordinator. Oversight activities were conducted in alignment with statutory requirements and established timelines, with focused attention on fiscal accountability, governance practices, operational systems, and implementation of the educational program.

Blue Oak Academy participants in the review process included Superintendent Dr. Karin Aure; Principal Staci Soares, Vice Principal Alexis Vance, Director of Special Education Corey Morse; and ELPAC Coordinator Mackenzie Souza. Engagement activities also included teacher focus groups, two student focus groups representing grades 3–5 and 6–8, and a parent focus group. These perspectives contributed to a comprehensive understanding of the school’s program implementation and educational partner experience.

Mission Statement

Blue Oak Academy’s mission is to provide a "world-class education" through a rigorous curriculum that intentionally develops 21st-century critical thinkers. As outlined in *The Academies Charter Management Organization (TACMO) Strategic Plan (2024-2029)* and the *Charter Renewal Petition*, this mission is anchored by the strategic pillars of "Providing Quality Education for All" and "Investing in People." This foundation is designed to ensure that all students, regardless of background or ability, receive an engaging, enriching educational experience that nurtures their natural curiosity and talents through gifted education strategies and project-based learning. During the March 23 site visit, the oversight team observed these high-level strategic goals in actual classroom practice, as school administrators confirmed that the mission and strategic plan focus areas are now a standing integration in regular staff meetings.

The "Quality Education for All" pillar was most visible through the school-wide implementation of Socratic Seminars, observed in both 3rd and 8th-grade classrooms. These seminars serve as a primary vehicle for the school's mission to foster "Argumentative Thinking." Utilizing an "inner and outer circle" model, students navigated complex "Universal Themes" such as Power and Adaptation. In the 8th-grade seminar, the discussion was notably grounded in a survey administered to the entire student body, demonstrating the school's strategic effort to "foster a stronger sense of community and belonging" by elevating student voice. The outer circle was particularly intentional, broken into four distinct parts: observing a partner, engaging in self-reflection, sharing seminar thoughts, and utilizing specific "sentence starters" to scaffold academic discussion. This level of scaffolding ensures that the "world-class" rigor remains accessible to all students, providing a clear path for every learner to engage in the high-level discourse promised in the charter.

Instruction across the campus is organized around "Universal Themes," such as Power and Adaptation, which teachers reported are used to create intentional connections between daily learning and real-world student experiences. In a 4th/5th-grade classroom of 26 students, this was demonstrated through a "Mining Chocolate Chips" activity supported by Teachers Curriculum Institute (TCI) materials. Students were not merely participating in a hands-on task; they were engaged in the complex tracking and analysis of the chocolate chips collected, the tools utilized, and the total money earned. This problem-based approach, emphasizing that adaptation occurs over time, directly mirrors the Charter Petition's definition of an "educated person" as one who can analyze data and apply critical thinking skills to evolving scenarios.

This commitment to applied learning extends into Math and Science, where middle school students engage in engineering units focused on mitigating natural disasters, such as simulating tsunami scenarios. These units are further enhanced by the school's commitment to providing project-based learning (PBL) three times per year, supplemented by specific enrichment activities and field trips. For example, administrators highlighted bringing "Cranium" to campus for a specialized Gold Rush activity. These experiences are not isolated events but are strategically designed to satisfy the "Provide Quality Education for All" pillar by ensuring that enrichment and "gifted" strategies are the baseline for the entire student body.

The success of these academic endeavors is predicated on the school's second strategic pillar, "Investing in People." During the teacher focus group, one participant captured the school's current culture by noting that achieving their mission is not easy. She stated, "what we're trying to do here is hard. We've always had good people, but right now, we have the right people in the right place for the first time." This sentiment reflects the school's strategic effort to establish a structure for hiring and retaining high-caliber staff. The presence of classified aides in the classroom, providing direct instructional support, further illustrates this investment, ensuring that the rigorous curriculum is paired with the human capital needed to support individual student progress.

Additionally, the impact of this mission-driven alignment is felt deeply by the families. In the parent focus group, participants cited their appreciation for the school's dedication to "individual progression." Parents feel that the school's use of foundational supports, such as phonics instruction and i-Ready for reading and math, provides the necessary foundational knowledge that allows their children to then successfully tackle the higher-level inquiry and PBL units. This partnership between families and the school validates the strategic goal of "fostering a stronger sense of community and belonging," as parents see the mission of "world-class education" translating into tangible academic and personal growth for their children.

Student Demographics

Student demographic data were reviewed using publicly available DataQuest and SARC information to ensure reporting accuracy and to provide context for instructional planning, resource allocation, and supplemental support.

A review of 2024–25 demographic data reveals that Blue Oak Academy continues to work toward achieving demographic parity with the Visalia Unified School District (VUSD) and Tulare County. Currently, BOA serves a lower percentage of English Learners (9.3% compared to VUSD's 14.2% and Tulare County's 21.9%) and socioeconomically disadvantaged students (38.4% compared to VUSD's 68.2% and Tulare County's 77.9%). However, the school serves a slightly higher percentage of students with disabilities (11.6%) than VUSD and Tulare County at large.

To address these gaps, the school leadership has committed to a "thoughtful marketing" strategy designed to ensure broad-based recruiting and equitable access for all families in the community. The strategy includes multilingual application materials, community-based outreach (e.g., local events, preschool engagement, and targeted marketing), and ongoing evaluation of enrollment patterns to refine recruitment efforts. While the strategy is comprehensive and well-articulated, current data indicate that the school has not yet fully achieved demographic balance reflective of the surrounding district population.

Staffing Demographics and Credentialing

Staff demographic data show that BOA employs a moderately diverse workforce, although the composition does not fully mirror either the county or the student population. In 2024–2025, Hispanic staff comprise approximately 30.0% of employees, while White staff represent about 56.7%. Smaller percentages of staff identify as American Indian (3.3%), while approximately 10.0% of staff did not report an ethnicity.

A random sampling of staff records confirmed that teachers are appropriately credentialed and assigned for their respective roles. Evidence indicates that teachers in core academic subjects hold the required credentials to satisfy certification standards. Furthermore, documentation verifies that special education staff possess appropriate credentials and that classified staffing

levels are sufficient to manage clerical and recordkeeping functions. Overall, teaching staff levels appear adequate to maintain a student-to-teacher ratio comparable to large unified districts within the county.

FISCAL ACCOUNTABILITY

The fiscal review indicates that the school remains in strong financial condition. P1 ADA reflects a slight increase of approximately 4 percent, from 406.39 ADA in 2024-25 to 422.99 ADA in 2025-26. The school maintains exceptional liquidity, with cash on hand exceeding 170 days in each month of the current fiscal year and projected to remain well above the 60-day minimum requirement through the remainder of the year and into the subsequent fiscal year.

Multiyear projections demonstrate robust reserve levels exceeding 30 percent in the current year and both out years, reflecting conservative budgeting practices and prudent fiscal management. Additionally, the school does not project deficit spending in the current or subsequent fiscal years, indicating a structurally balanced budget.

Based on this review, the school is well-positioned to meet its financial obligations and sustain operations, and no fiscal concerns were identified.

GOVERNANCE

Blue Oak Academy, a charter managed by The Academies Charter Management Organization, demonstrates strong governance structures aligned with statutory requirements and best practices. The Academies governing board maintains an active roster of seven members, consistent with the composition outlined in the school's charter petition. Board meetings are regularly scheduled and conducted in compliance with the Brown Act, with agendas posted within the required timeframe, including accommodations for the public, and references to the public's right to inspect meeting materials. Meetings include opportunities for public comment.

Observations collected by TCOE Leadership Support Services during the February 17, 2026, board meeting indicate that the Board demonstrates transparency and accountability by approving consent agenda items such as prior meeting minutes, attendance reports, and service agreements, and by taking formal votes on policies, plans, and other agreements. Voting is conducted via roll call, further supporting transparency. Board discussions reflect active oversight of academic and operational matters, including teacher and principal reports detailing student learning projects, mental health initiatives, enrollment trends, professional development, and operational updates. The superintendent provided updates on mid-year LCAP progress, staff and student surveys, and communication with families regarding parent forums, highlighting the board's engagement in continuous school improvement.

Board policies address key operational areas, including discipline, complaint procedures, personnel, and safety. Areas for improvement include the Conflict of Interest Code, which has not been filed with the Tulare County Board of Supervisors since 2020; school leadership has acknowledged this gap and is actively working to complete the required biennial update.

Parent and Community Engagement:

BOA fosters a culture of partnership that is deeply rooted in its strategic goal of "fostering a stronger sense of community and belonging on campus." This commitment to inclusion is validated by LCAP data, which indicates that 89% of parents agree the organization actively encourages their involvement. The school's approach to engagement is multifaceted, combining consistent one-way information sharing, highly responsive two-way communication, and meaningful collaboration on school-wide policy.

The foundation of the school's information system is built on an "open-door policy" and efficient digital communication. Parents identified ParentSquare as the primary tool for staying informed about school-wide updates; however, the feedback from the family focus group highlighted that the school's communication goes far beyond general notifications. Parents expressed high satisfaction with the "individual contact" they maintain with teachers, noting that email and text responses are typically received the same day as their original inquiry. This immediate responsiveness creates a true "partnership" feel, with parents observing that the school is exceptionally proactive. One parent noted that teachers frequently reach out to collaborate on solutions "before a problem" even arises, contacting families the moment the first signs of an academic or social-emotional need are noticed. Parents emphasized that this pre-problem communication is vital, as it allows them to work in tandem with the school to address student needs before they escalate.

Beyond academic updates, Blue Oak Academy emphasizes a "whole-family" approach to community building. Focus group participants described a calendar of events that included the school carnival, the book fair, and school dances. These events are viewed not just as school functions, but as significant "community events." One parent shared that these activities "mirror our home value of a family support team," reinforcing the school's role as an extension of the family unit. This sentiment highlights the success of the school's mission to nurture a welcoming environment where families feel their individual student's progression is the school's top priority.

The school also ensures that parents are active collaborators in governance and school-wide decision-making. Families are encouraged to participate in formal leadership roles through the English Learner Advisory Committee (ELAC) and the School Site Council (SSC). These committees, alongside regular surveys and LCAP input meetings, provide a structured way for families to collaborate on school policies and resource allocation. By combining informal, daily accessibility with these formal collaborative structures, BOA maintains a transparent and responsive environment that honors the parent as a vital partner in the educational process.

OPERATIONAL MANAGEMENT

Operational systems at BOA are well-developed and compliant with applicable regulations, supporting the school's capacity to manage resources effectively. Student record-keeping systems are organized, accessible, and compliant, and clear systems are in place for managing special education services, including thorough documentation and delivery of required supports. The school maintains compliance with the required assurances under the Education Code, including nondiscrimination, open enrollment, and lottery procedures. Safety and facility requirements are consistently met, with an updated safety plan and emergency preparedness protocols visible in classrooms, including safety buckets near doors and posted emergency exit routes/instructions. Collectively, these operational systems support effective day-to-day functioning, compliance, and organizational processes, while providing structures for managing resources to meet regulatory and instructional priorities.

This strong foundation of operational management has provided continuity even as the school experienced a change in superintendent at the start of the 2025–26 school year. Despite the transition in leadership, the school has maintained stability in its daily operations while continuing to advance its instructional goals. School administration credited the Superintendent for intentionally embedding the mission and strategic plan into all decision-making and planning, serving as a north star that keeps resources and efforts aligned.

EDUCATIONAL PROGRAM

Instructional Program

Blue Oak Academy currently maintains a 'Middle' performance designation under the state's charter renewal criteria. To support its trajectory toward high performance, the school employs a data-driven instructional model that intentionally scales student learning from foundational mastery to complex, high-level inquiry. While the school's overarching mission focuses on universal themes and critical thinking, the daily educational program is operationalized through an assessment cycle and a Multi-Tiered System of Supports (MTSS) designed to monitor and improve pupil outcomes. The program uses i-Ready Math and ELA as its primary diagnostic to identify student academic needs. Diagnostic assessments are administered three times per year, providing teachers with the data necessary to recognize skill gaps and inform targeted interventions.

In addition to standardized diagnostics, the school has successfully systematized its writing instruction through a common, calibrated rubric. This process involves three "on-demand" assessment periods per year where teams meet to analyze data and calibrate scoring. While leadership noted that pacing and coherence are current strengths, they also identified a critical need to further strengthen Tier I core instruction. This is particularly vital given the significant

number of new teachers on staff. Ensuring consistent delivery across all classrooms remains a priority to prevent the curricular gaps that existed in the past.

To ensure all students can access this rigorous curriculum, the school places a heavy emphasis on the mastery of foundational literacy through UFLI (phonics), 95 Phonics, and i-Ready. During classroom observations, the oversight team saw this foundational work in action, from explicit phonics in Kindergarten to 1st-grade sound sorting and 2nd-grade "checks for understanding" using whiteboards. However, the administration shared that parents have expressed a strong desire for more accelerated Tier I opportunities and enhanced differentiation within the classroom. Both parents and administrators identified the need to develop clearer systems for extending learning, ensuring that students performing above grade level receive the enrichment and challenge required to meet their individual potential.

Blue Oak Academy fulfills its commitment to diverse learners through a sophisticated blend of Designated and Integrated English Language Development (ELD). For the 9.3% of the student body identified as English Learners, the school provides targeted pull-out support while embedding language scaffolds into core subjects. Similarly, Special Education services are delivered through a hybrid model, with aides present in nearly every classroom. Parents praised this individualized approach, citing the school's proactivity in assessing for IEPs and providing mental health support for anxiety. Despite these successes, teachers noted an opportunity to further align instructional practices to ensure a more unified experience for all students, regardless of their assigned classroom.

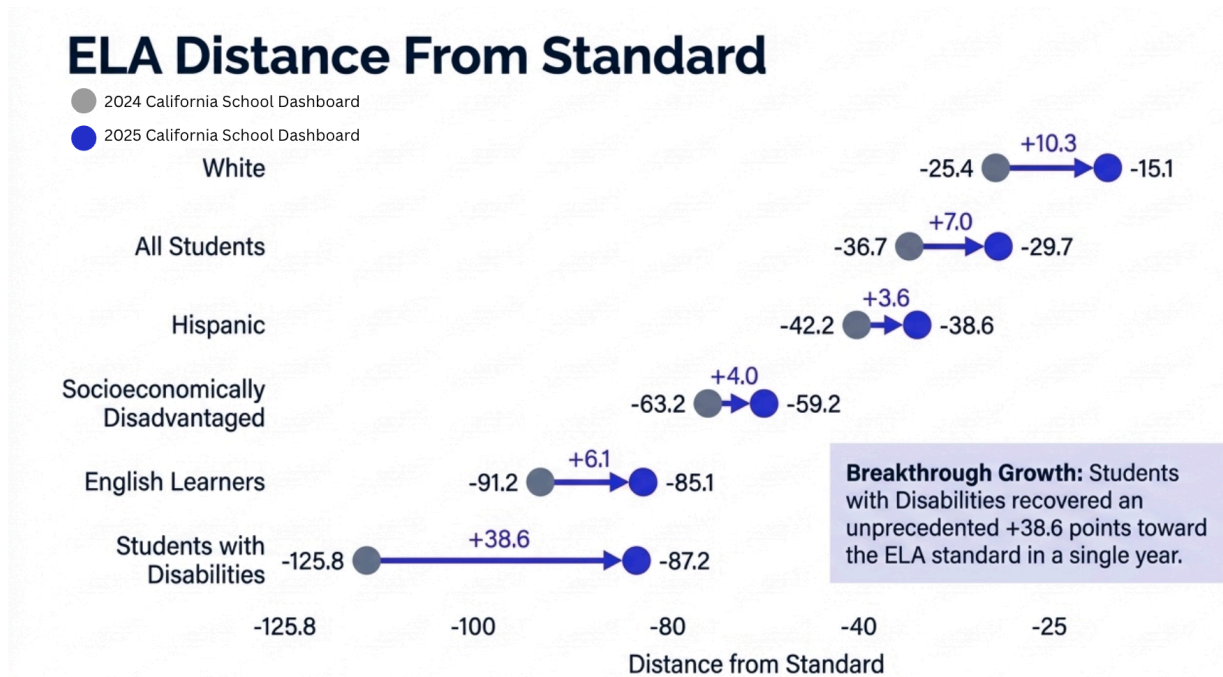
The success of these programs is supported by an investment in professional development, including ten days of coaching from TCOE coaches and California Collaborative for Learning Acceleration (CCLA) training. This training helps teachers understand students' thinking more deeply. At the systems level, leadership conducts regular walkthroughs and analyzes trends to inform improvement. A key area of growth identified by staff is the need to improve alignment between Blue Oak and its sister school, Sycamore, specifically through the development of common assessments and consistent expectations for student learning.

The student focus group provided a more nuanced perspective on the program's consistency and climate. While students in grades 3–5 generally felt supported, describing learning as "challenging but fun," they did share concerns about occasional behavioral issues in common areas, such as restrooms. They also expressed a desire for more hands-on science learning. Older students in grades 6–8 raised more academic concerns, particularly about their transition to high school. These students noted that while they appreciate that "teachers don't just give the answers," they do not always feel consistently challenged by their schoolwork, particularly in comparison to the perceived rigor at neighboring district middle schools. The student group suggested the restructuring of block and elective time to offer more advanced or specialized classes.

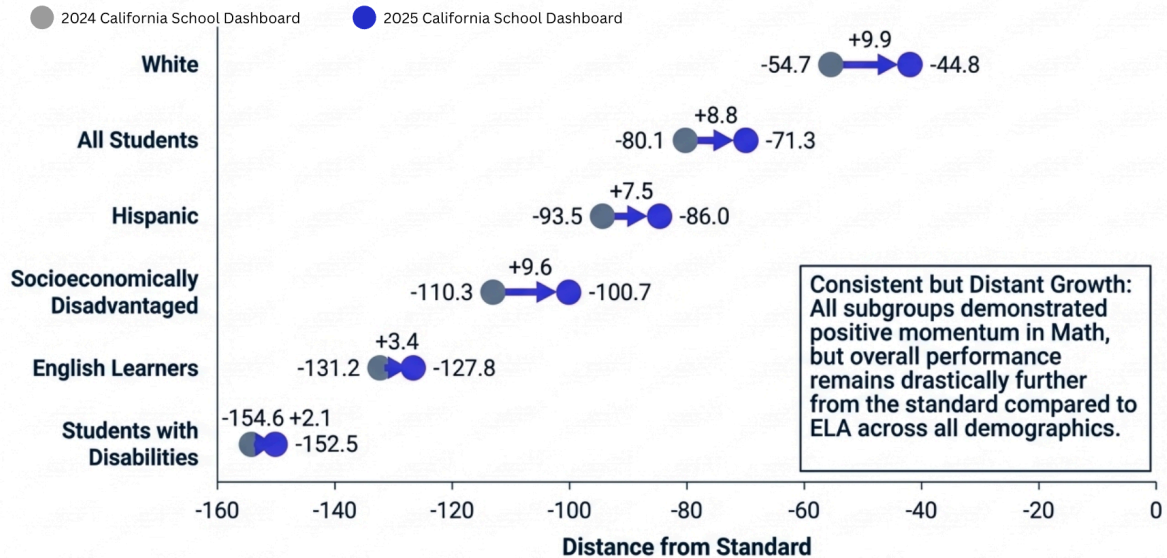
Furthermore, both teachers and students identified a need to address gaps in adult-to-student connections. While students generally feel "cared for," they highlighted a distinction between that and "feeling known" by their instructors. Ensuring that every student, especially those new to the campus, is known by multiple adults is a priority area for improving the school climate. Additionally, parents identified a need for more formal extracurricular structures, such as a sports league and improved facilities for play.

Measurable Pupil Outcomes

Blue Oak has demonstrated upward movement in core academic areas, particularly in English Language Arts (ELA) and Mathematics. In ELA, the school improved from a baseline of 36.7 points below standard to 29.7 points below standard, with 75.2% of students showing accelerated growth. Mathematics also saw positive gains, rising from 80.1 points below standard to 71.3 points below standard. The English Learner Progress Indicator (ELPI) results demonstrated that 46.9% of students were making progress towards English proficiency. While overall ELA scores remain below the state average, the high percentage of students achieving accelerated growth and the above-average ELPI results suggest that the school’s instructional interventions are effectively narrowing the achievement gap.

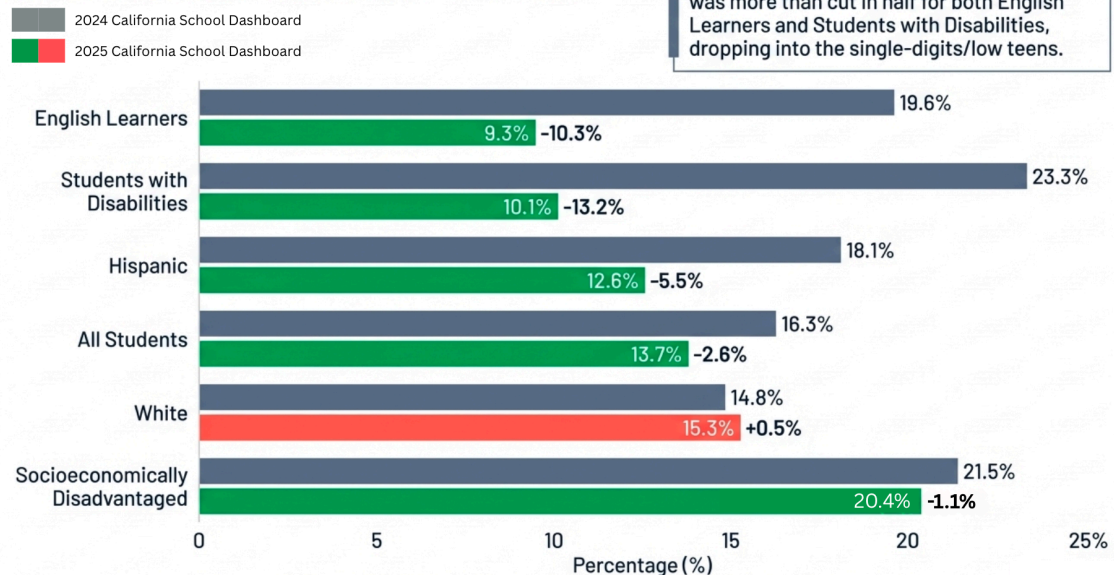


Mathematics Distance From Standard

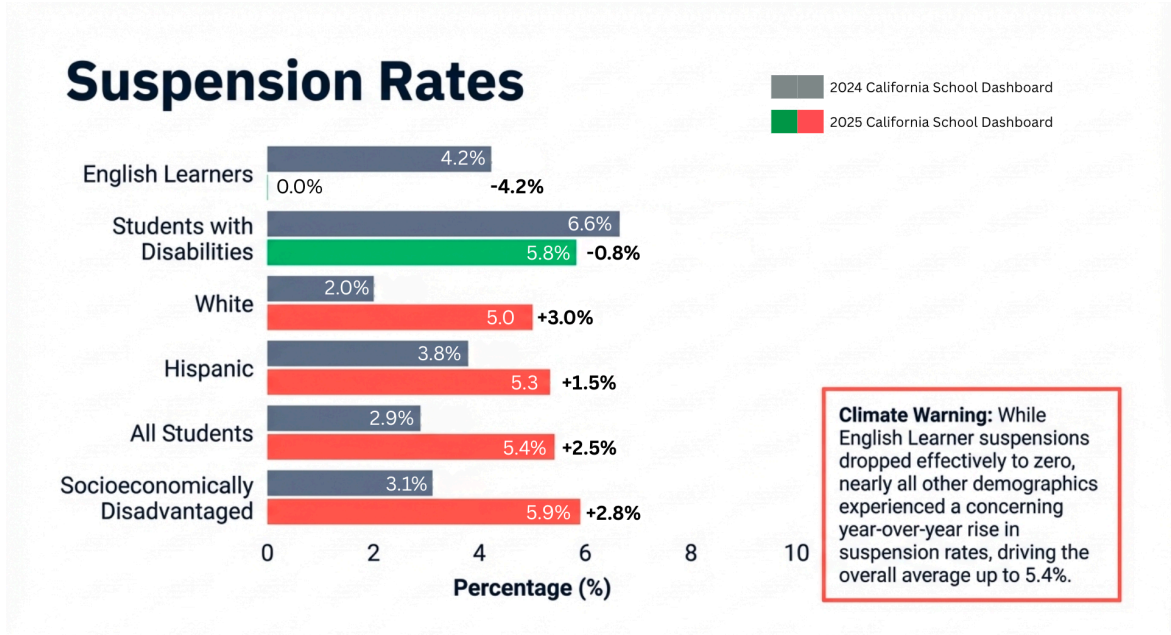


Regarding pupil engagement, the school has made notable strides in reducing chronic absenteeism. The overall rate dropped from 16.3% to 13.7%, with a significant breakthrough for English Learners, whose absenteeism rate was cut by more than half, falling from 19.6% to 9.3%. Hispanic students also showed marked improvement, decreasing from 18.1% to 12.6%. These figures indicate that the school’s strategies to improve daily attendance and engage high-needs student populations are yielding measurable results.

Chronic Absenteeism Rates



School climate data, however, presents a more complex picture. The suspension rate increased from 2.9% to 5.4%, a trend that now exceeds the state average and warrants closer monitoring. This increase was particularly noted among Socioeconomically Disadvantaged students, whose rate rose to 5.9%. Despite these disciplinary challenges, 2024-25 local climate surveys remained positive; 77% of students continue to report feeling safe at school, and parent satisfaction regarding extracurricular offerings jumped significantly from 73% (2023-24) to 89% (2024-25), suggesting a strong sense of community connection despite the uptick in suspension data.



COMMENDATIONS/RECOMMENDATIONS

Commendations

- Implementation of high-level discourse through Socratic Seminar model to support critical thinking
- Engaging, hands-on instructional activities that connect to “Universal Themes”
- Parents report high satisfaction with the school's encouragement of their involvement, specifically praising the proactive "individual contact" from teachers and the use of ParentSquare for updates
- The school has implemented i-Ready for diagnostics and utilizes writing performance tasks across grade levels to monitor and improve pupil outcomes
- The governing board demonstrates active oversight and transparency, conducting meetings in compliance with the Brown Act, and the Superintendent ensures that the school's mission is integrated into regular staff meetings and decision-making

Recommendations

- Complete the biennial update of the Conflict of Interest Code and file it with the Tulare County Board of Supervisors Clerk
- Continue targeted marketing and recruitment efforts to improve demographic parity with Tulare County, particularly for English learners and socioeconomically disadvantaged students
- Prioritize the consistency of core instruction across all classrooms to prevent curricular gaps, particularly given the significant number of new teachers on staff
- Develop clearer systems for extending learning and providing enrichment for students performing above grade level to meet their individual potential, addressing a specific desire expressed by parents and administrators
- Closely monitor the recent increase in suspension rates, which rose from 2.9% to 5.4%

EXECUTIVE SUMMARY

The Tulare County Office of Education conducted the 2025–26 annual oversight review of Blue Oak Academy to examine fiscal accountability, governance and operations, and implementation of the educational program. Evidence was gathered through document analysis, site observations, and educational partner input to evaluate alignment among the school’s instructional systems, compliance practices, and organizational operations with the commitments outlined in the charter petition.

Fiscal Accountability

The school maintains a strong financial position, characterized by a structurally balanced budget and conservative fiscal management. Recent data shows a 4 percent increase in Average Daily Attendance (ADA) and exceptional liquidity, with cash reserves consistently exceeding 170 days—well above the 60-day minimum requirement. Furthermore, multiyear projections indicate robust reserves exceeding 30 percent with no projected deficit spending, confirming the school is well-positioned to meet its long-term financial obligations.

Governance and Operational Management

Blue Oak Academy demonstrates strong governance and operational management through a structure that is closely aligned with statutory requirements. Managed by The Academies Charter Management Organization, the school maintains an active seven-member governing board that ensures transparency by conducting meetings in full compliance with the Brown Act. Board oversight is comprehensive, covering academic performance, mental health initiatives, and fiscal accountability, as evidenced by the formal approval of essential school plans, such as the LCAP, and regular reviews of operational updates. The school maintains high standards in student record-keeping, safety protocols, and personnel management. Overall, the school's operational systems provide a stable foundation that supports its mission.

Educational Program

BOA provides a robust educational program centered on an instructional model that emphasizes critical thinking and the integration of "Universal Themes." The school’s academic framework is supported by the implementation of common assessments, which allows for data-driven adjustments to instruction. While the school has maintained high levels of parent satisfaction with its instructional approach and proactive teacher communication, recent feedback from its educational partners indicates a need to strengthen Tier I core instruction to ensure consistency across all classrooms. Additionally, while the school successfully serves its general student population, the report highlights the importance of further developing differentiated strategies for accelerated learners and continuing targeted outreach to better serve English Learners and socioeconomically disadvantaged students in alignment with local demographics.

Tulare County Office of Education

Tim A. Hire, County Superintendent of Schools

Sycamore Valley Academy

Annual Oversight Report

2025-2026

Authorizing Agency:

Tulare County Office of Education

Tim A. Hire, County Superintendent of Schools

**Sycamore Valley Academy
Annual Oversight
2025-26**

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Sycamore Valley Academy Annual Oversight

INTRODUCTION

Review Process and Participants

The Tulare County Office of Education (TCOE) Leadership Support Services (LSS) conducted the 2025–26 Annual Oversight Review for Sycamore Valley Academy (SVA) utilizing a collaborative oversight framework designed to ensure compliance, promote transparency, and support continuous improvement. The review process included advance document submission and comprehensive desk review, followed by site-based activities, observation of a governing board meeting, and ongoing communication between the charter school and the authorizing agency. This structured approach allowed for the examination of fiscal, operational, and instructional practices while maintaining an open and constructive partnership throughout the process.

The LSS charter oversight team consisted of Karen Costa, LSS Administrator; Jesse Sanchez, LSS Administrator; and Christina Loya, Fiscal Program Development and Support Coordinator. Oversight activities were conducted in alignment with statutory requirements and established timelines, with focused attention on fiscal accountability, governance practices, operational systems, and implementation of the educational program.

Sycamore Valley Academy participants in the review process included Superintendent Dr. Karin Aure; Principal and Director of Special Education Corey Morse; and Vice Principal and ELPAC Coordinator Mackenzie Souza. Engagement activities also included teacher focus groups, two student focus groups representing grades 3–5 and 6–8, and a parent focus group. These perspectives contributed to a comprehensive understanding of the school’s program implementation and educational partner experience.

Mission Statement

Sycamore Valley Academy’s (SVA) instructional model is rooted in a mission that emphasizes cultivating student growth, curiosity, and creativity within an inclusive, collaborative community. Observational data and educational partner feedback consistently reflect these priorities, particularly through a strong commitment to differentiation. By utilizing i-Ready diagnostics, writing assessments, and formative checks, the school meets students at their individual levels, a practice central to its "Gifted Education for All" philosophy. This responsive system is further evidenced by flexible, cross-grade level math groupings based on skill attainment, alongside scaffolding strategies like sentence frames and visuals that support English learners.

The instructional program’s focus on student-centered learning and academic discourse aligns with the charter’s goal of fostering critical thinking and independent inquiry. In observed

classrooms, students engaged in collaborative problem-solving and discussion-based learning, using multiple strategies to approach complex tasks. Teachers facilitate this growth by questioning and prompting rather than providing direct answers, reinforcing the development of independent thinking skills. Students noted that this culture of "productive struggle" is intentional, reporting that teachers "give hints" and "let us think through it," which creates an environment where intellectual engagement is highly valued.

SVA's implementation of "gifted education for all" and its emphasis on scholarly habits—such as perseverance, curiosity, and intellectual risk-taking—directly support the mission of developing self-directed learners. For instance, in multi-age mathematics lessons, students use manipulatives and are prompted to identify critical information independently. This approach requires students to make sense of problems and persist through challenges, embodying the "growth mindset" prioritized in the school's charter. Professional development initiatives, including "Building Thinking Classrooms" and math-focused training through the California Collaborative for Learning Acceleration (CCLA), provide teachers with the tools to embed these habits into daily instruction.

While many scholarly habits are integrated, the strategic plan's focus on "Quality Education for All" suggests areas for further refinement, specifically in student-driven goal setting. Although robust assessment systems and data cycles are in place to track progress, classroom observations and focus groups indicated that students are not yet consistently engaged in setting and reflecting on their own academic goals. Strengthening this aspect of the program would more fully realize the charter's vision of empowering students as active participants in their own learning journey and enhancing their meta-cognitive development.

Social-emotional learning and collaboration are foundational strengths that align with the school's "whole-child" approach. Systems such as the Honor Code, tiered interventions, and a dedicated coordination of services team ensure that students feel seen and supported. Staff collaboration is structured through early-release Wednesdays and instructional coaching using digiCOACH, promoting coherence across the campus. Families also report a strong sense of partnership, facilitated by transparent communication through ParentSquare and regular conferences, which fulfills the charter's mandate to maintain a collaborative school culture where parents are valued partners.

Finally, while Project-Based Learning (PBL) is a "foundational part" of SVA's instructional design according to its charter, current implementation shows room for growth to meet the standards of The Academies Charter Management Organization (TACMO) Strategic Plan. Observations noted elements of engagement, but a fully realized PBL model, characterized by sustained inquiry and authentic, student-directed projects, was not consistently evident. Moving forward, leadership systems are positioned to support this improvement through regular

walkthroughs and vertical articulation, ensuring that high-quality PBL becomes a more prominent and integrated feature of the daily educational experience.

Student Demographics

Sycamore served a diverse student population of approximately 419 students in 2024–2025. When compared to county averages, the school’s demographic composition shows several notable differences. Hispanic or Latino students make up 54.2% of the school population, which is substantially lower than the county average of 79.6%, and the data indicate the school has historically enrolled a lower percentage of Hispanic students than the county. Conversely, White students comprise 36.0% of the student population, which is significantly higher than the county average of 13.3%, a trend that has remained consistent over time.

The school also differed from the county in its enrollment of high-need student groups in 2024–2025. Socioeconomically disadvantaged students represent 38.2% of enrollment, which is significantly below the county average of 77.9%, and the data show this subgroup has historically been underrepresented compared to county averages. In contrast, students with disabilities make up 16.0% of the student population, which exceeds the county average of 11.4%, indicating the school serves a comparatively higher proportion of students requiring special education services. English Learners represent a relatively small portion of the student body at approximately 4.8%, and this group has historically been below county averages as well.

The school has implemented intentional outreach strategies to promote equitable access and a diverse applicant pool. These include multilingual application materials, community-based outreach (e.g., local events, preschool engagement, and targeted marketing), and ongoing evaluation of enrollment patterns to refine recruitment efforts. While these strategies are comprehensive and well-articulated, current data indicate that the school has not yet fully achieved demographic balance reflective of the surrounding district population.

Staffing Demographics and Credentialing

Staff demographic data show that Sycamore employs a moderately diverse workforce, although the composition does not fully mirror either the county teaching or student population. In 2024–2025, Hispanic staff comprise approximately 35.5% of employees, while White staff represent about 38.7%. Smaller percentages of staff identify as Asian (6.5%) and American Indian (3.2%), while approximately 16.1% of staff did not report an ethnicity.

A random sampling of staff records confirmed that teachers are appropriately credentialed and assigned for their respective roles. Evidence indicates that teachers in core academic subjects hold the required credentials to satisfy certification standards. Furthermore, documentation verifies that special education staff possess appropriate credentials and that classified staffing levels are sufficient to manage clerical and recordkeeping functions.

During the review, it was identified that the Vice Principal has been serving under an Administrative Services Credential waiver. While the school was proactive in disclosing this, it was discovered that the waiver has expired. The school is currently collaborating with TCOE to resubmit the necessary documentation and is scheduled to present a subsequent waiver for Board approval in April. Aside from this pending administrative update, overall teaching staff levels appear adequate to maintain a student-to-teacher ratio comparable to large unified districts in the county.

FISCAL ACCOUNTABILITY

The fiscal review indicates that the school remains in strong financial condition. P1 ADA reflects a slight decline of approximately 3 percent, from 399.76 ADA in 2024-25 to 387.72 ADA in 2025-26; however, this change does not impact the school's overall fiscal stability. The school maintains exceptional liquidity, with cash on hand exceeding 175 days in each month of the current fiscal year and projected to remain well above the 60-day minimum requirement through the remainder of the year and into the subsequent fiscal year.

Multiyear projections demonstrate robust reserve levels exceeding 40 percent in the current year and both out years, reflecting conservative budgeting practices and prudent fiscal management. Additionally, the school does not project deficit spending in the current or subsequent fiscal years, indicating a structurally balanced budget.

Based on this review, the school is well-positioned to meet its financial obligations and sustain operations, and no fiscal concerns were identified.

GOVERNANCE

SVA, a charter managed by TACMO, demonstrates strong governance structures aligned with statutory requirements and best practices. The Academies governing board maintains an active roster of seven members, consistent with the composition outlined in the school's charter petition. Board meetings are regularly scheduled and conducted in compliance with the Brown Act, with agendas posted within the required timeframe, including accommodations for the public, and references to the public's right to inspect meeting materials. Meetings include opportunities for public comment.

Observations collected by TCOE Leadership Support Services during the February 17, 2026 meeting indicate that the Board demonstrates transparency and accountability by approving consent agenda items such as prior meeting minutes, attendance reports, and service agreements, and by taking formal votes on policies, plans, and other agreements. Voting is conducted via roll call, further supporting transparency. Board discussions reflect active oversight of academic and operational matters, including teacher and principal reports detailing student learning projects, mental health initiatives, enrollment trends, professional development, and operational updates.

The superintendent provided updates on mid-year LCAP progress, staff and student surveys, and communication with families regarding parent forums, highlighting the board's engagement in continuous school improvement.

Board policies address key operational areas, including discipline, complaint procedures, personnel, and safety. Areas for improvement include the Conflict of Interest Code, which has not been filed with the Tulare County Board of Supervisors since 2020; school leadership has acknowledged this gap and is actively working to complete the required biennial update.

Parent and Community Engagement

SVA demonstrates a well-established culture of family engagement, utilizing both formal and informal systems to ensure transparency and meaningful partnership. Communication is streamlined through ParentSquare, classroom newsletters, and direct teacher outreach, making student progress and grades readily accessible. Families emphasized that this communication is proactive and relational, noting that staff provide timely updates and positive feedback rather than only reaching out when concerns arise. This consistent flow of information serves as the foundation for a shared responsibility for student success.

The school's open-door policy further reinforces this partnership, creating a "warm" and "welcoming" environment where parents are encouraged to be active participants in the learning process. One parent highlighted this relational nature, noting, "I visit twice a month and I'm greeted by name... it creates a partnership in learning." This trust extends to the school's responsiveness to individual student needs; families report that staff take a proactive approach to meeting students where they are, ensuring they are supported as "more than a number" through clear, solution-oriented communication.

Structured opportunities for engagement ensure that parent voice is integrated into school improvement and decision-making. Formal avenues, such as the English Learner Advisory Council (ELAC) and focus groups, provide platforms for families to offer input on programmatic decisions. Additionally, the SVA Parent Teacher Organization (PTO) facilitates active parent leadership through community-building and fundraising events like the Fall Carnival and spring auction. Parents also contribute directly at the classroom level by serving as room parents or volunteering to support instruction and student engagement.

Beyond these specific roles, SVA provides a wide range of partnering opportunities that promote ongoing engagement and shared accountability. Families are encouraged to attend events such as Back-to-School Night, Open House, and student performances, or participate in parent workshops and governing board meetings. By contributing to LCAP development through parent forums and completing annual satisfaction surveys, families remain vital partners in the school's mission, ensuring the educational program remains responsive to the needs of the entire community.

OPERATIONAL MANAGEMENT

Operational systems at SVA are well-developed and compliant with applicable regulations, supporting the school’s capacity to manage resources effectively. Comprehensive student record-keeping systems are organized, accessible, and compliant, and clear systems are in place for managing special education services, including thorough documentation and delivery of required supports. The school maintains adherence to required assurances under the Education Code, including nondiscrimination, open enrollment, and lottery procedures. Safety and facility requirements are consistently met, with an updated safety plan and emergency preparedness protocols visible in classrooms, including safety buckets or bags near doors and posted emergency exit routes/instructions. Collectively, these operational systems support effective day-to-day functioning, compliance, and organizational processes, while providing structures for managing resources to meet regulatory and instructional priorities.

This strong foundation of operational management has provided continuity even as the school experienced a change in superintendent at the start of the 2025–26 school year. Despite the transition in leadership, the school has maintained stability in its daily operations while continuing to advance its instructional goals. School leaders acknowledge the ongoing challenge of balancing the demands of state accountability standards with the vision and mission articulated in the charter petition, which emphasizes a “gifted for all” approach. They recognize that meeting state assessment requirements while fostering innovation in teaching and learning requires careful management of resources, including time, personnel, and fiscal allocations. Prioritizing this balance remains central to their approach, ensuring that instructional programs are both compliant with state mandates and responsive to the evolving needs of learners.

EDUCATIONAL PROGRAM

Instructional Program

SVA is currently classified in the 'Middle' performance category under state charter renewal criteria. The school’s instructional program remains closely aligned with its mission and charter commitments, supported by coherent systems for instruction, intervention, and student engagement. This framework is anchored in data-informed differentiation and flexible structures that provide targeted support for diverse learners.

Instruction is driven by a comprehensive assessment system, including i-Ready diagnostics, interim assessments, and writing benchmarks administered multiple times per year. These data are used to group students by instructional need, adjust pacing, and inform targeted supports. Teachers implement ongoing formative assessment practices, including daily checks for understanding, to guide real-time instructional decisions. At the systems level, leadership conducts regular classroom walkthroughs and analyzes trends in student performance, attendance, and climate data to inform continuous improvement efforts.

The school's use of multi-age groupings and flexible scheduling, particularly in mathematics, allows for instructional groupings based on skill level rather than grade placement. This structure supports both acceleration and intervention and reflects intentional alignment to the charter's emphasis on meeting students where they are academically.

The program includes a focus on advanced thinking and student discourse, supported by professional learning. Classroom evidence showed students engaging in problem-solving, discussion, and the use of multiple strategies, with teachers facilitating learning through questioning and guided support. These practices contribute to a learning environment that promotes critical thinking and active participation.

Support systems for student groups are clearly defined and operationalized. English learners receive both designated and integrated ELD instruction, with structured supports embedded in core content. Special education services are delivered through a combination of push-in and pull-out models, supported by credentialed staff and coordinated service delivery. The school's multi-tiered system of support outlines a progression of interventions, from core instruction to targeted and intensive supports, including coordination of academic and social-emotional services.

The instructional program is further supported by a positive and inclusive school environment, where systems and practices contribute to strong student engagement and access to learning. Parent and student focus group members indicated that social-emotional learning and wellness practices are embedded in the school culture and daily practices. Schoolwide norms, such as the Sycamore Honor Code and classroom agreements, establish clear expectations for respect, responsibility, and community, and were visibly posted and reinforced across classrooms. Administrators described a coordinated approach to supporting students through tiered systems, including the use of coordination of services structures that address mental health needs, ensuring that students receive appropriate and timely support.

Parents consistently emphasized the school's attentiveness to the whole child, including social-emotional well-being. One parent with experience in mental health services noted that the school "works to ensure mental health needs are met," reinforcing the perception that the school values and supports all aspects of student development. Families also shared that staff are proactive in addressing concerns, communicating not only what occurred but how situations were resolved and how students were supported. Parents further expressed appreciation for the school's inclusive environment, with comments such as wanting their child to "value other people and their opinions," indicating that the school's culture promotes empathy, respect, and community-mindedness.

Student feedback aligned with these observations, highlighting strong relationships with teachers and a sense of belonging on campus. Students reported that teachers "notice" them, "hear us out," and help resolve conflicts when issues arise. Some students acknowledged that while

typical peer challenges occur, adults are responsive and supportive in helping them navigate those situations. Students also noted the importance of the school counselor, who provides support and guidance when they are hurt, upset, or need someone to talk to. Additionally, students shared that making friends is easy and that they feel included, with one student noting, “I feel included,” and another describing how staff supported them during a difficult experience, including incidents involving peer conflict.

Measurable Pupil Outcomes

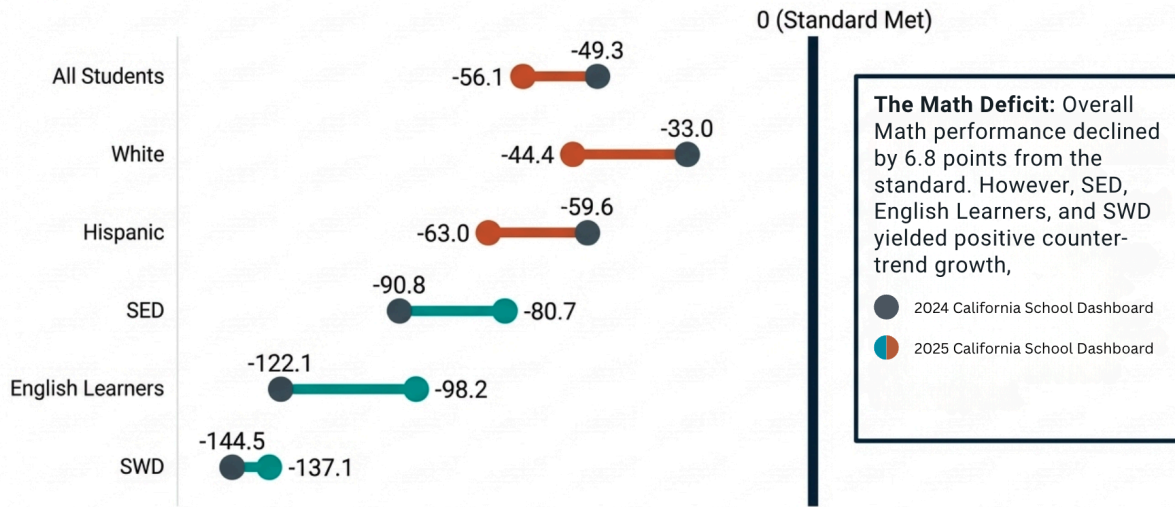
Sycamore’s measurable pupil outcomes indicate that while overall academic performance on state assessments in English Language Arts (ELA) and mathematics remains below state standards, student growth outcomes demonstrate meaningful academic progress. Distance from Standard results show modest improvement in ELA, moving from -21.9 to -20.1 distance from standard (DFS), while math saw a decline from -49.3 to -56.1 DFS for all students. Despite these mixed DFS results, the California School Dashboard growth model indicates that the majority of students are demonstrating academic growth in both ELA and mathematics, suggesting most students are improving year over year. Local i-Ready diagnostic data support this trend, showing consistent fall-to-spring growth in reading and mathematics over the last two years in both ELA and math.

An analysis of student groups shows both successes and areas needing continued attention to ensure equitable outcomes. Hispanic students generally perform near, but below, the school average and demonstrate similar growth patterns. Students with disabilities represent the most significant area of need, particularly in mathematics, where performance gaps remain despite evidence of growth. Socioeconomically disadvantaged students also tend to perform below school averages in mathematics, suggesting a continued need for targeted academic interventions to support equitable achievement outcomes across student groups.

ELA: Average Distance from Standard

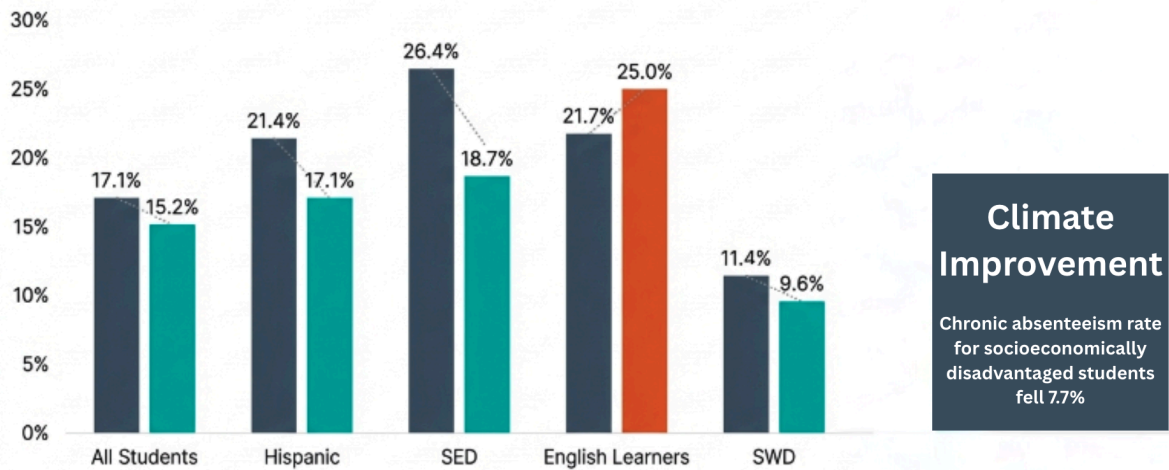


Mathematics: Average Distance from Standard

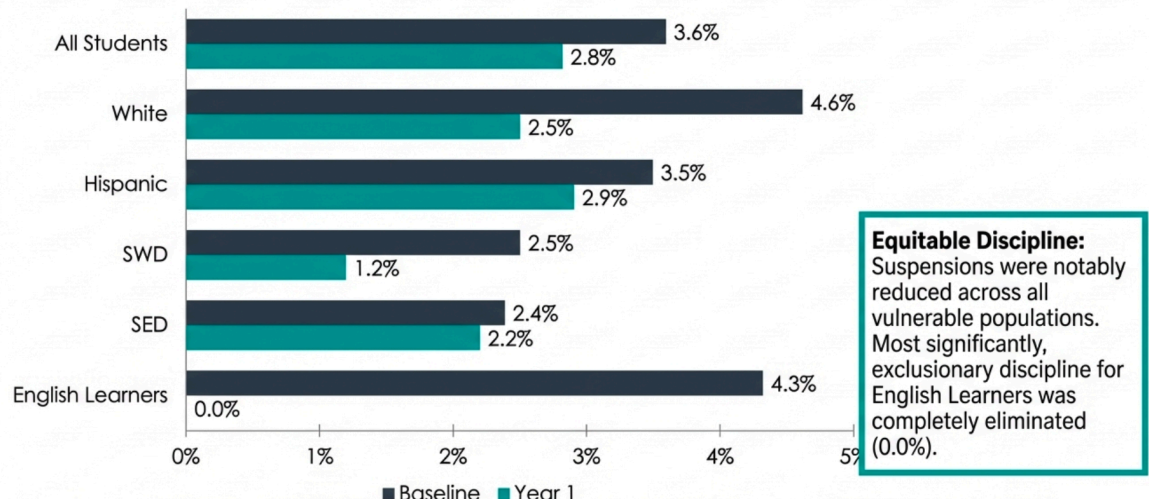


Student engagement indicators show generally positive trends. Chronic absenteeism declined in the most recent year, suggesting improving student engagement, although rates remain higher among some higher-need student groups, including socioeconomically disadvantaged students and students with disabilities. Suspension rates remain relatively low and declined with no significant patterns of disproportionality identified.

Chronic Absenteeism Trajectory: Major Systemic Wins & Targeted Needs



Suspension Rate Reductions: Universal and Equitable Climate Improvements



COMMENDATIONS/RECOMMENDATIONS

Commendations

- Strong alignment between instructional practices and the school’s mission, particularly in promoting student engagement, critical thinking, scholarly habits, and student-centered learning practices such as inquiry, collaboration, and productive struggle.
- Comprehensive systems of differentiated instruction and student support, demonstrating an inclusive approach to meeting the needs of diverse learners.

- Positive school culture reflected in strong relationships, effective behavioral systems, declining suspension rates, and improving chronic absenteeism trends.
- Effective use of multiple data sources and assessment measures to monitor student progress and inform instructional decision-making.
- Strong organizational systems, including transparent governance practices, active board oversight, meaningful family engagement, and a commitment to continuous professional learning.

Recommendations

- Further align the strategic plan with the mission and vision, ensuring clear implementation priorities and staff ownership of key initiatives.
- Strengthen targeted academic supports, particularly for English learners and Hispanic students in English language arts and for improving consistency in mathematics outcomes for all students through vertical alignment.
- Complete the biennial update of the Conflict of Interest Code and file it with the Tulare County Board of Supervisors Clerk.
- Develop more systemic protocols to scale professional learning and ensure consistent implementation of instructional priorities such as project-based learning and the gifted education framework.
- Expand student ownership of learning, including strengthening goal-setting practices and exploring expanded career awareness opportunities for middle school students.

EXECUTIVE SUMMARY

The Tulare County Office of Education conducted the 2025–26 annual oversight review of Sycamore Valley Academy to examine fiscal accountability, governance and operations, and implementation of the educational program. Evidence was gathered through document analysis, site observations, and educational partner input to evaluate alignment among the school’s instructional systems, compliance practices, and organizational operations with the commitments outlined in the charter petition.

Fiscal Accountability

The school remains in a strong financial position characterized by structural balance and exceptional liquidity, with cash reserves consistently exceeding 175 days—well above the 60-day minimum requirement. Despite a slight 3% decline in Average Daily Attendance (ADA) for the 2025-26 period, the school's fiscal stability remains unaffected due to conservative budgeting and prudent management. Multiyear projections indicate robust reserve levels exceeding 40% and an absence of deficit spending through the subsequent fiscal years. Consequently, the school is well-positioned to meet all future financial obligations with no identified fiscal concerns.

Governance and Operational Management

Sycamore Valley Academy maintains governance structures consistent with statutory requirements, including Brown Act compliant board meetings, established board policies, and regular review of school programs and operations. Operational systems include organized student records, special education documentation, safety planning, and emergency procedures. The school maintains family communication systems through ParentSquare, conferences, newsletters, and parent engagement opportunities such as PTO, ELAC, LCAP input meetings, and school events. A required update to the Conflict of Interest Code was identified and is in progress.

Educational Program

The school utilizes a comprehensive assessment framework, including i-Ready diagnostics and writing benchmarks, to drive differentiated classroom practices and targeted supports. While local trends show general academic progress and a rise in ELA performance, math results have declined, and significant achievement gaps persist. Specifically, socioeconomically disadvantaged students face challenges across absenteeism, math, and ELA, while students with disabilities show performance gaps in math and ELA despite maintaining stable attendance and low suspension rates. This data underscores a continued need for targeted interventions even as chronic absenteeism declines and suspension rates remain low overall.



ENCLOSURE #9

ENCLOSURE SUMMARY

Strategic Action Update: Hiring process

FROM: Shauna Dolin

DATE: 5/19/2026

BACKGROUND: Discussing where we are currently with the revision processes for our internal TACMO Hiring & Exiting Protocol and looking at our next steps.

Board Meeting 05/19/26 – Program Update

TACMO Hiring & Exiting Protocol Revision Progress Update

Strategic Action B1 – New Hire Staff

Prepared by: Shauna Dolin, Human Resources Director

I wanted to provide a brief update regarding the revision process for our internal TACMO Hiring & Exiting Protocol. This revision work initially began in November, with feedback requested from Hiring Supervisors by December prior to Winter Break. Feedback continued to be collected through January; however, final review and decision-making regarding the revisions were paused during my leave of absence and resumed once I returned. I wanted to share the progress made thus far and the direction moving forward. The goal remains to have the finalized version ready for implementation beginning July 1 for the 2026-27 school year.

The revisions are intended not only to improve clarity, consistency, compliance alignment, role accountability, and onboarding/offboarding workflow organization, but also to strengthen TACMO's overall hiring practices and help ensure we continue attracting, selecting, and retaining high-quality staff who are the best fit for our schools and students.

Key revisions made so far include:

- Reorganizing the protocol into clearly defined sections and phases of the hiring process, including:
 - Position Authorization
 - Request to Post Job
 - Interview & Candidate Selection
 - Candidate Notification & Offer
 - Pre-Hiring & Onboarding
 - Staff Exiting Procedures
 - Substitute Hiring Procedures
- Clarifying approval expectations and budget authorization requirements before hiring activity may begin, including distinctions between replacement positions and newly created positions.
- Expanding recruitment and posting procedures to include additional external recruitment platforms such as LinkedIn and Indeed, while also clarifying responsibilities between HR, Operations, the Superintendent, and site administrators related to recruitment outreach.
- Adding more detailed applicant screening expectations, including documentation review requirements and guidance regarding Edjoin application completeness.
- Refining interview panel expectations, including:
 - Minimum panel composition requirements
 - Expanded requirements for administrator/director hiring panels
 - Guidance for alternative panel selection in extenuating circumstances
 - Clarification regarding interview documentation and confidentiality expectations
- Adding more structured second-round interview expectations, including demonstration lessons and coaching demonstrations for applicable positions.
- Further separating and clarifying hiring procedures by employee classification, including certificated, classified, and administrator/director positions.
- Adding updated compliance procedures tied to AB 2534 and SB 848 reference check requirements, fingerprint clearance verification, Megan's Law checks, and onboarding timelines.

- Expanding onboarding workflow details to better define responsibilities between HR, Operations, the Administrative Manager, and the CMO Office Assistant, including system setup, onboarding training, payroll documentation, and employee access/account creation.
- Revising and clarifying staff exit procedures, including:
 - Final pay timelines
 - Separation processing responsibilities
 - Technology and account deactivation
 - Personnel file archiving
 - Operations and systems offboarding steps
- Streamlining and clarifying substitute hiring procedures, including responsibility delegation between HR, the Administrative Manager, and the CMO Office Assistant.

Next Steps:

There are still a few sections throughout the draft that contain comments or items flagged for additional review and refinement prior to finalization, primarily involving implementation logistics, formatting cleanup, creating helpful templates, and a handful of workflow clarifications. Those remaining edits are expected to be addressed during final review prior to rollout for the 2026-27 school year.



ENCLOSURE #10

ENCLOSURE SUMMARY

Consideration of Approval of the Monthly Financials Presentation

FROM: Meagan Miller of Vertex Education

DATE: 5/19/2026

BACKGROUND: Monthly financials report.

SUPERINTENDENT'S RECOMMENDATION: Approve.

The Academies CMO Board Financial Update

MEAGAN MILLER

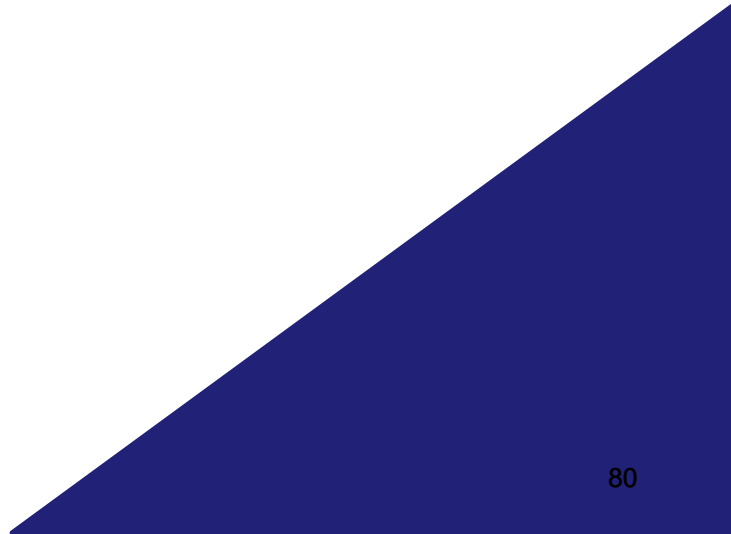
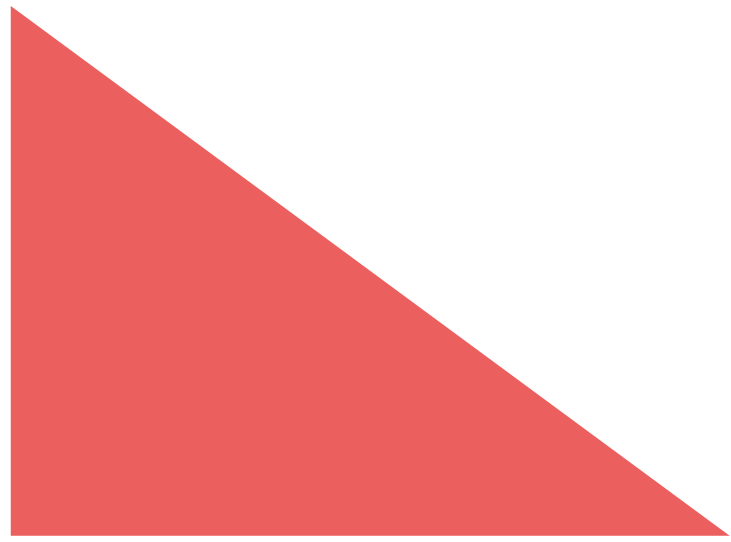
MAY 19, 2026





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 - FY26 April Financials



April Financials

2025-2026



2025-26 Forecast Summary

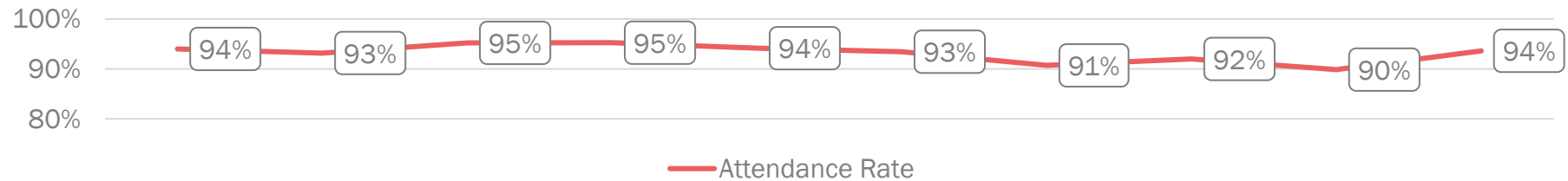
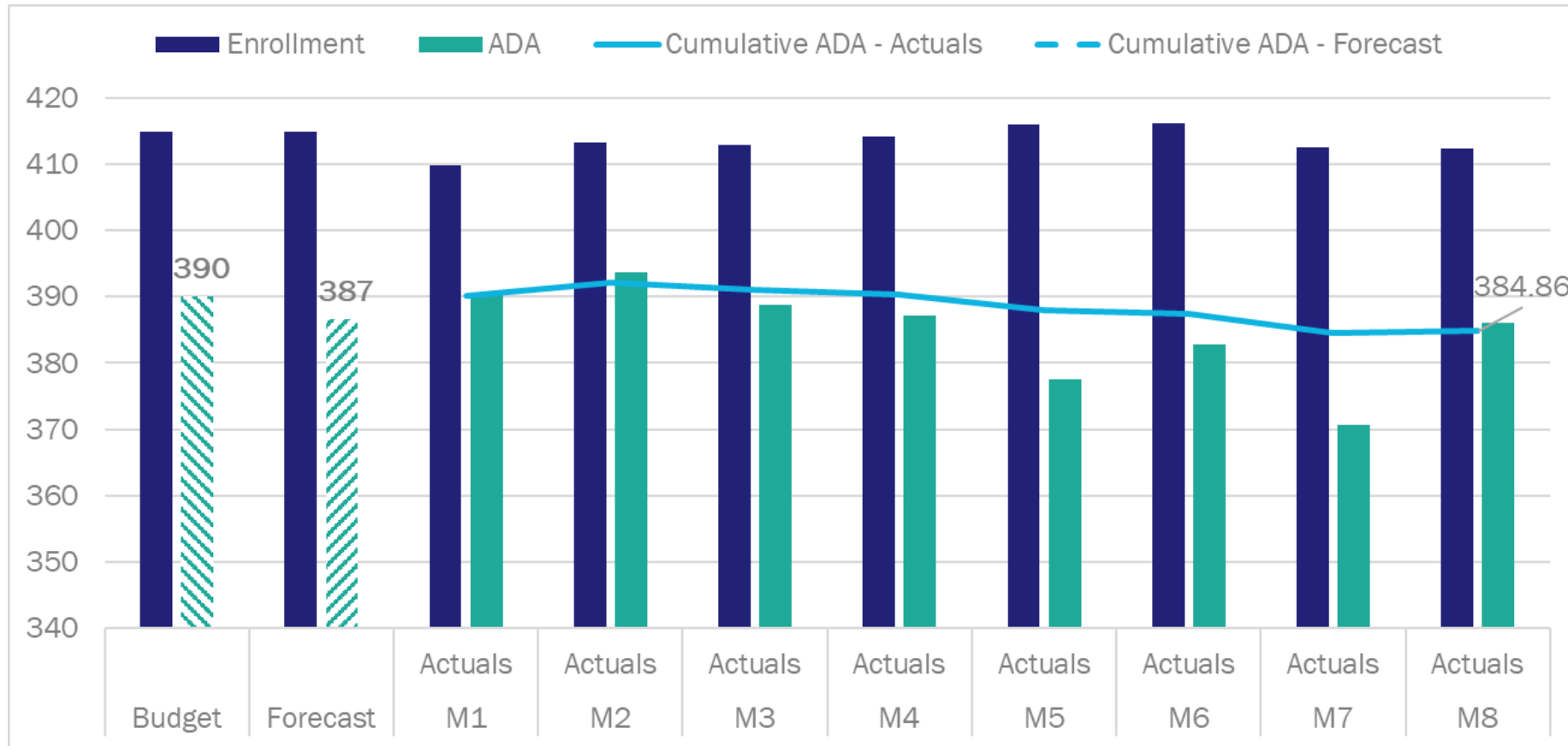
\$79k decrease to Total Operating Income

		SVA	BOA	Total	CMO
Total Revenue	Approved Budget	5,840,538	6,339,444	12,179,983	1,479,656
	Current Forecast	5,913,700	6,353,167	12,266,868	1,383,124
	Increase (decrease)	73,162	13,723	86,885	(96,532)
Expenses	Approved Budget	5,830,447	6,087,590	11,918,037	1,479,656
	Current Forecast	5,827,907	6,256,434	12,084,342	1,383,124
	Decrease (Increase)	2,540	(168,844)	(166,304)	96,532
Operating Income	Approved Budget	10,091	251,854	261,945	(0)
	Current Forecast	85,793	96,733	182,526	(0)
	Increase (decrease)	75,702	(155,121)	(79,419)	0
Fund Balance	Beg. Balance (Audited)	2,278,357	1,887,090	4,165,447	115
	Operating Income (Loss)	85,793	96,733	182,526	0
Ending Fund Balance (Current Forecast)		2,364,150	1,983,823	4,347,973	115
Ending Fund Balance as % of Expenses		41%	32%	36%	0%

SVA ADA Update



P-2 ADA certified at 384.86; -2.24 from forecast



BOA ADA Update



P-2 ADA certified at 421.24; +3.24 from forecast



2025-26 Current Forecast vs Previous Forecast

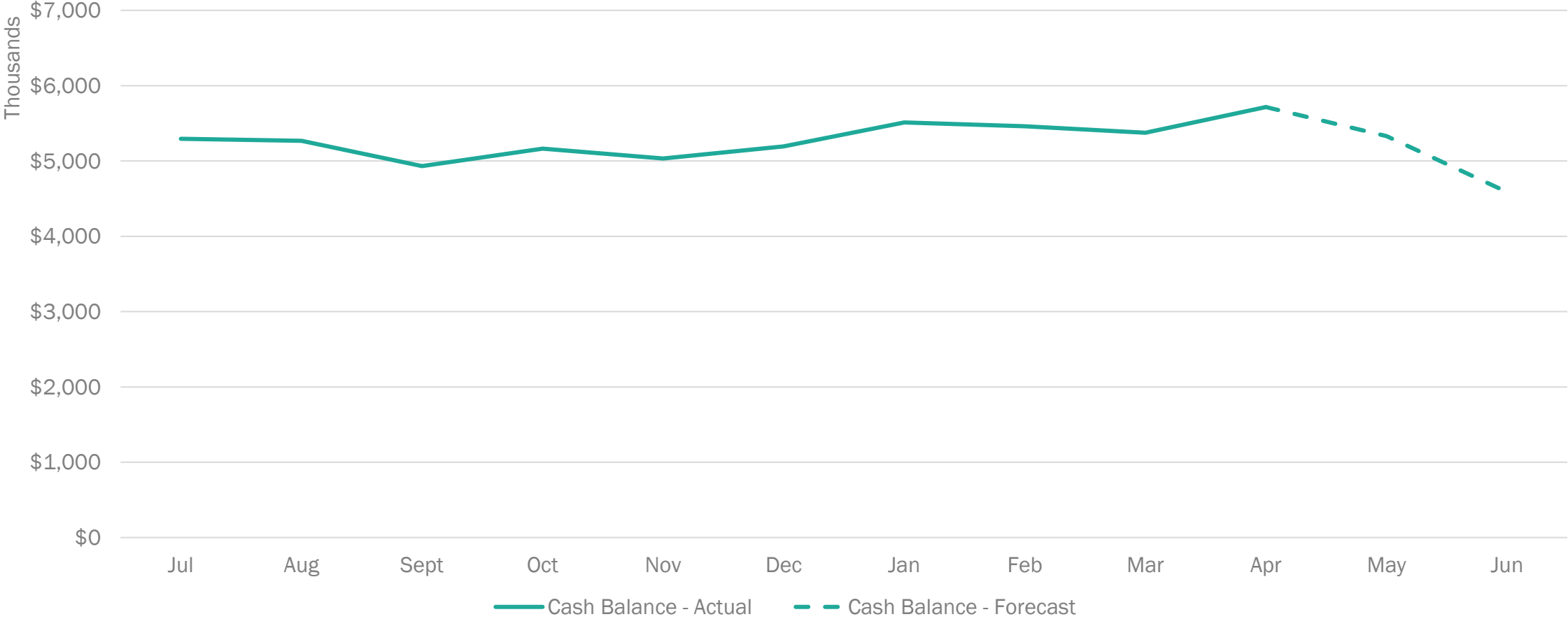
Only small adjustments related to trending actuals





Monthly Cash Balance

As of April 2026, 155 days cash on hand



Accounts Payable Aging



As of 4/30/26, TACMO had \$0k invoices outstanding at 30 days or less



Aging AP represents invoices submitted to EdTec but not paid as of last day of the month

Preliminary Budget

2026-2027



Budget Next Steps

Governor's May Revise

- Released mid-May
- Impacts revenue projections

Early June

- Budget projections presented incorporating May Revise
- Finalize adjustments to FY27 budget

End of June

- TACMO Board approves budget
- Budget is submitted to TCOE
- State approves budget

SVA Preliminary Budget

Budget adjustments are still in process; May Revise updates to be included

		2025-26	2026-27
		Current Forecast	Projected Budget
Revenue	LCFF Entitlement	4,679,619	4,821,161
	Federal Revenue	210,243	209,282
	Other State Revenues	939,714	902,499
	Local Revenues	76,624	76,624
	Fundraising and Grants	7,500	7,500
	Total Revenue	5,913,700	6,017,066
Expenses	Compensation and Benefits	4,203,675	4,474,280
	Books and Supplies	122,587	125,087
	Services and Other Operating Expenditures	1,489,748	1,457,042
	Depreciation	11,897	11,897
	Other Outflows & Amortization	-	-
	Total Expenses	5,827,907	6,068,307
Net Income		85,793	(51,241)
	Beginning Balance (Audited)	2,278,357	2,364,150
	Net Income	85,793	(51,241)
Ending Fund Balance (incl. Depreciation)		2,364,150	2,312,910
Ending Fund Balance as % of Expenses		40.6%	38.1%

BOA Preliminary Budget

Budget adjustments are still in process; May Revise updates to be included

		2025-26	2026-27
Revenue		Current Forecast	Projected Budget
	LCFF Entitlement	5,190,183	5,350,683
	Federal Revenue	207,067	210,061
	Other State Revenues	869,717	884,461
	Local Revenues	71,200	66,000
	Fundraising and Grants	15,000	15,000
	Total Revenue	6,353,167	6,526,205
Expenses	Compensation and Benefits	4,585,536	4,901,222
	Books and Supplies	191,297	166,531
	Services and Other Operating Expenditures	1,471,162	1,443,952
	Depreciation	8,439	8,439
	Other Outflows & Amortization	-	-
	Total Expenses	6,256,434	6,520,143
	Net Income	96,733	6,062
	Beginning Balance (Audited)	1,887,090	1,983,823
	Net Income	96,733	6,062
Ending Fund Balance (incl. Depreciation)		1,983,823	1,989,885
Ending Fund Balance as % of Expenses		31.7%	30.5%

Exhibits

2025-2026



SVA
Income Statement
As of Apr FY2026

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
SUMMARY											
Revenue											
LCFF Entitlement	335,071	322,074	628,940	3,459,987	4,687,754	4,679,619	4,679,619	-	(8,135)	1,219,632	74%
Federal Revenue	6,230	-	-	98,934	184,014	210,243	210,243	-	26,229	111,309	47%
Other State Revenues	63,907	48,116	74,270	492,020	884,646	939,714	939,714	-	55,068	447,695	52%
Local Revenues	1,433	98	252	14,780	76,624	76,624	76,624	-	-	61,844	19%
Fundraising and Grants	-	-	216	3,802	7,500	7,500	7,500	-	-	3,698	51%
Total Revenue	406,641	370,288	703,678	4,069,523	5,840,538	5,913,700	5,913,700	-	73,162	1,844,177	69%
Expenses											
Compensation and Benefits	394,557	395,455	370,514	3,611,524	4,307,849	4,203,675	4,203,675	-	104,174	592,151	86%
Books and Supplies	1,619	4,301	7,415	82,106	115,484	122,468	122,587	(119)	(7,102)	40,481	67%
Services and Other Operating Expenditures	43,554	77,634	52,998	465,886	1,395,217	1,488,163	1,489,748	(1,585)	(94,531)	1,023,863	31%
Depreciation	1,518	1,518	1,518	15,176	11,897	11,897	11,897	-	-	(3,279)	128%
Other Outflows & Amortization	-	-	-	388	-	-	-	-	-	(388)	
Total Expenses	441,247	478,908	432,444	4,175,080	5,830,447	5,826,203	5,827,907	(1,704)	2,540	1,652,827	72%
Net Income	(34,607)	(108,620)	271,233	(105,557)	10,091	87,498	85,793	(1,704)	75,702	191,350	
Fund Balance											
Beginning Balance (Unaudited)					2,275,976	2,278,357	2,278,357	-	2,381		
Net Income					10,091	87,498	85,793	(1,704)	75,702		
Ending Fund Balance					2,286,067	2,365,855	2,364,150	(1,704)	78,083		
Fund Balance as a % of Expenses					39%	41%	41%	0%	1%		
KEY ASSUMPTIONS											
Enrollment Summary											
K-3					196	196	196	-	-		
4-6					141	141	141	-	-		
7-8					78	78	78	-	-		
Total Enrolled					415	415	415	-	-		
ADA %											
K-3					94.0%	93.2%	93.2%	0.0%	-0.8%		
4-6					94.0%	93.2%	93.2%	0.0%	-0.8%		
7-8					94.0%	93.2%	93.2%	0.0%	-0.8%		
Average ADA %					94.0%	93.2%	93.2%	0.0%	-0.8%		
ADA											
K-3					184.24	182.64	182.64	-	(1.60)		
4-6					132.54	131.39	131.39	-	(1.15)		
7-8					73.32	72.68	72.68	-	(0.64)		
Total ADA					390.10	386.71	386.71	-	(3.39)		
REVENUE											
LCFF Entitlement											
8011 Charter Schools General Purpose Entitlement - State Aid	259,504	253,593	253,593	2,093,044	3,071,727	2,818,831	2,818,831	-	(252,896)	725,787	74%

SVA
Income Statement
As of Apr FY2026

		Actual			YTD	Budget & Forecast						
		Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
8012	Education Protection Account Entitlement	-	-	254,222	742,245	744,309	996,646	996,646	-	252,336	254,401	74%
8019	State Aid - Prior Years	7,086	-	-	7,086	-	-	-	-	-	(7,086)	
8096	Charter Schools in Lieu of Property Taxes	68,481	68,481	121,125	617,612	871,717	864,142	864,142	-	(7,575)	246,531	71%
SUBTOTAL - LCFF Entitlement		335,071	322,074	628,940	3,459,987	4,687,754	4,679,619	4,679,619	-	(8,135)	1,219,632	74%
Federal Revenue												
8181	Special Education - Entitlement	-	-	-	-	88,440	88,440	88,440	-	-	88,440	0%
8291	Title I	-	-	-	40,884	44,948	55,325	55,325	-	10,377	14,441	74%
8292	Title II	3,730	-	-	6,119	8,053	9,547	9,547	-	1,494	3,428	64%
8294	Title IV	2,500	-	-	5,000	10,000	10,000	10,000	-	-	5,000	50%
8296	SRSA Grant	-	-	-	46,931	32,573	46,931	46,931	-	14,358	-	100%
8297	PY Federal - Not Accrued	-	-	-	0	-	-	-	-	-	(0)	
SUBTOTAL - Federal Revenue		6,230	-	-	98,934	184,014	210,243	210,243	-	26,229	111,309	47%
Other State Revenue												
8319	Other State Apportionments - Prior Years	-	-	-	1,313	-	1,313	1,313	-	1,313	1	100%
8381	Special Education - Entitlement (State)	41,457	14,278	14,278	113,006	175,932	175,932	175,932	-	-	62,926	64%
8382	Special Education Reimbursement (State)	2,986	2,922	2,922	24,093	31,095	32,773	32,773	-	1,678	8,680	74%
8550	Mandated Cost Reimbursements	-	-	-	8,022	8,023	8,023	8,023	-	-	1	100%
8560	State Lottery Revenue	-	-	-	32,346	111,232	109,862	109,862	-	(1,371)	77,516	29%
8590	All Other State Revenue	-	4,446	30,600	141,354	312,797	359,844	359,844	-	47,047	218,490	39%
8591	Prop 28 Arts & Music in Schools	5,893	5,902	5,902	47,817	58,847	65,523	65,523	-	6,676	17,706	73%
8593	ELO-Program	13,571	20,568	20,568	124,069	186,720	186,445	186,445	-	(275)	62,375	67%
SUBTOTAL - Other State Revenue		63,907	48,116	74,270	492,020	884,646	939,714	939,714	-	55,068	447,695	52%
Local Revenue												
8660	Interest	1,424	84	78	5,898	5,000	5,000	5,000	-	-	(898)	118%
8689	FUA Reimbursement	-	-	-	-	71,624	71,624	71,624	-	-	71,624	0%
8699	All Other Local Revenue	8	14	173	8,882	-	-	-	-	-	(8,882)	
SUBTOTAL - Local Revenue		1,433	98	252	14,780	76,624	76,624	76,624	-	-	61,844	19%
Fundraising and Grants												
8801	Donations - Parents	-	-	1	575	-	-	-	-	-	(575)	
8802	Donations - Private	-	-	-	20	-	-	-	-	-	(20)	
8803	Fundraising	-	-	215	3,207	7,500	7,500	7,500	-	-	4,293	43%
SUBTOTAL - Fundraising and Grants		-	-	216	3,802	7,500	7,500	7,500	-	-	3,698	51%
TOTAL REVENUE		406,641	370,288	703,678	4,069,523	5,840,538	5,913,700	5,913,700	-	73,162	1,844,177	69%
EXPENSES												
Compensation & Benefits												
Certificated Salaries												
1100	Teachers Salaries	104,029	103,952	103,780	990,828	1,322,987	1,050,421	1,050,421	-	272,566	59,593	94%
1101	Teacher - Stipends	1,700	1,250	2,250	50,030	71,732	71,732	71,732	-	-	21,703	70%
1103	Teacher - Substitute Pay	12,302	14,948	10,891	77,815	78,023	75,000	75,000	-	3,023	(2,815)	104%
1111	Teacher - Specialist	23,160	23,160	21,182	241,497	203,355	280,353	280,353	-	(76,998)	38,856	86%
1148	Teacher - Special Ed	30,870	30,546	30,716	282,373	342,997	324,276	324,276	-	18,721	41,903	87%
1150	Teacher - Intervention	26,831	26,831	26,831	245,951	275,013	298,650	298,650	-	(23,637)	52,698	82%

SVA
Income Statement
As of Apr FY2026

		Actual			YTD	Budget & Forecast						
		Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
1300	Certificated Supervisor & Administrator Salaries	23,594	23,594	23,594	242,469	279,478	284,354	284,354	-	(4,876)	41,884	85%
SUBTOTAL - Certificated Salaries		222,486	224,282	219,243	2,130,963	2,573,584	2,384,785	2,384,785	-	188,799	253,822	89%
Classified Salaries												
2100	Classified Instructional Aide Salaries	36,244	34,352	28,827	269,565	314,161	312,528	312,528	-	1,634	42,962	86%
2103	Classified - Special Education	23,518	23,673	22,646	169,623	211,449	214,519	214,519	-	(3,070)	44,896	79%
2400	Classified Clerical & Office Salaries	14,677	13,879	10,123	129,972	148,808	149,854	149,854	-	(1,045)	19,882	87%
2905	Other Classified - After School	-	78	-	78	-	-	-	-	-	(78)	
2930	Other Classified - Maintenance/grounds	4,106	3,910	4,497	44,256	48,418	50,835	50,835	-	(2,417)	6,579	87%
2935	Other Classified - Substitute	2,566	2,176	1,404	19,731	15,450	20,000	20,000	-	(4,550)	269	99%
SUBTOTAL - Classified Salaries		81,112	78,069	67,497	633,226	738,287	747,735	747,735	-	(9,449)	114,509	85%
Employee Benefits												
3100	STRS	42,395	42,532	41,396	386,355	485,825	449,764	449,764	-	36,061	63,409	86%
3300	OASDI-Medicare-Alternative	9,344	9,156	8,298	76,160	95,656	93,641	93,641	-	2,015	17,481	81%
3400	Health & Welfare Benefits	34,151	36,931	30,596	341,929	360,408	475,000	475,000	-	(114,592)	133,071	72%
3500	Unemployment Insurance	2,445	1,849	875	13,320	17,741	18,124	18,124	-	(383)	4,804	73%
3600	Workers Comp Insurance	2,499	2,499	2,499	28,298	33,119	31,325	31,325	-	1,794	3,027	90%
3900	403b contribution	126	137	111	1,272	3,230	3,300	3,300	-	(70)	2,029	39%
SUBTOTAL - Employee Benefits		90,959	93,104	83,774	847,335	995,978	1,071,154	1,071,154	-	(75,177)	223,819	79%
Books & Supplies												
4100	Approved Textbooks & Core Curricula Materials	-	98	-	2,059	11,000	25,806	25,806	-	(14,806)	23,747	8%
4200	Books & Other Reference Materials	-	-	5,369	10,419	6,212	6,212	6,219	(7)	(7)	(4,200)	168%
4300	Materials & Supplies	-	365	24	1,805	2,266	2,276	2,276	-	(10)	471	79%
4320	Educational Software	10	10	48	29,610	25,025	30,241	30,241	-	(5,216)	631	98%
4326	Art	-	163	-	2,014	14,399	6,000	6,000	-	8,399	3,986	34%
4330	Office Supplies	806	2,156	463	9,640	9,528	9,528	9,640	(112)	(112)	(0)	100%
4335	PE Supplies	-	138	-	945	1,900	1,900	1,900	-	-	955	50%
4346	Teacher Supplies	803	567	254	9,836	10,400	10,720	10,720	-	(320)	884	92%
4355	Science	-	275	-	1,031	600	1,032	1,032	-	(432)	1	100%
4410	Classroom Furniture, Equipment & Supplies	-	-	-	530	9,270	6,000	6,000	-	3,270	5,470	9%
4420	Computers: individual items less than \$5k	-	22	-	10,019	15,000	15,000	15,000	-	-	4,981	67%
4430	Non Classroom Related Furniture, Equipment & Supplies	-	400	1,036	2,628	8,835	6,000	6,000	-	2,835	3,372	44%
4710	Student Food Services	-	-	-	-	400	400	400	-	-	400	0%
4720	Other Food	-	106	221	1,571	650	1,353	1,353	-	(703)	(218)	116%
SUBTOTAL - Books and Supplies		1,619	4,301	7,415	82,106	115,484	122,468	122,587	(119)	(7,102)	40,481	67%
Services & Other Operating Expenses												
5210	Conference Fees	700	-	-	700	-	700	700	-	(700)	-	100%
5215	Travel - Mileage, Parking, Tolls	138	144	104	1,368	1,250	1,300	1,368	(68)	(118)	(0)	100%
5220	Travel and Lodging	916	797	-	1,955	4,500	3,000	3,000	-	1,500	1,045	65%
5225	Travel - Meals & Entertainment	23	85	-	356	659	659	659	-	-	303	54%
5305	Dues & Membership - Professional	-	-	-	1,367	600	1,500	1,500	-	(900)	133	91%
5400	Insurance	-	-	-	-	4,940	4,940	4,940	-	-	4,940	0%
5515	Janitorial, Gardening Services & Supplies	27	-	-	4,065	3,500	6,000	6,000	-	(2,500)	1,935	68%
5525	Utilities - Waste	802	1,824	-	9,886	11,557	11,557	11,557	-	-	1,671	86%
5610	Rent	-	-	-	352	274,284	274,636	274,636	-	(352)	274,284	0%
5619	Non-Cash Lease Adjustment	-	-	-	-	(6,410)	(6,410)	(6,410)	-	-	(6,410)	0%
5809	Banking Fees	-	-	-	47	1,442	1,442	1,442	-	-	1,395	3%

SVA
Income Statement
As of Apr FY2026

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current
					Budget v1	Forecast		Forecast vs. Current	Budget v1 vs. Current		
5812 Business Services	7,219	7,319	7,219	72,762	-	90,957	90,957	-	(90,957)	18,195	80%
5820 Non-Instructional Consultants	439	-	-	21,745	2,400	22,149	22,149	-	(19,749)	404	98%
5824 District Oversight Fees	-	-	-	-	46,878	46,796	46,796	-	81	46,796	0%
5830 Field Trips Expenses	1,718	5,786	13,636	24,804	30,000	30,000	30,000	-	-	5,196	83%
5833 Fines and Penalties	-	-	-	5	721	721	721	-	-	717	1%
5836 Fingerprinting	-	-	-	60	600	600	600	-	-	540	10%
5839 Fundraising Expenses	-	-	-	2,554	11,856	4,500	4,500	-	7,356	1,946	57%
5845 Legal Fees	383	-	-	10,836	5,000	10,836	10,836	-	(5,836)	-	100%
5851 Marketing and Student Recruiting	834	20	601	1,982	2,060	2,060	2,060	-	-	78	96%
5854 Consultants - CALPADS	3,446	1,946	446	8,963	1,030	12,000	12,000	-	(10,970)	3,038	75%
5857 Payroll Fees	1,089	1,202	1,590	8,019	6,600	6,600	6,600	-	-	(1,419)	121%
5858 CMO Services	-	-	-	-	649,023	600,592	602,109	(1,517)	46,914	602,109	0%
5860 Printing and Reproduction	2,171	3,178	1,807	22,608	25,510	25,510	25,510	-	-	2,902	89%
5861 Prior Yr Exp (not accrued)	-	1,020	-	11,823	-	12,000	12,000	-	(12,000)	178	99%
5863 Professional Development	-	21,373	-	48,011	30,683	49,000	49,000	-	(18,317)	989	98%
5869 Special Education Contract Instructors	7,327	8,982	9,826	70,884	111,031	92,108	92,108	-	18,923	21,224	77%
5875 Staff Recruiting	-	298	-	448	927	927	927	-	-	479	48%
5877 Student Activities	-	414	1,656	6,004	7,725	6,000	6,000	-	1,725	(4)	100%
5878 Student Assessment	-	1,276	-	2,457	5,150	3,000	3,000	-	2,150	543	82%
5880 Student Health Services	-	76	32	1,061	1,100	1,100	1,100	-	-	39	96%
5881 Student Information System	473	2,433	473	22,711	4,858	23,000	23,000	-	(18,142)	289	99%
5887 Technology Services	-	-	-	-	21,285	13,925	13,925	-	7,360	13,925	0%
5893 Transportation - Student	15,742	19,413	15,504	105,952	114,000	114,000	114,000	-	-	8,048	93%
5910 Communications - Internet / Website Fees	30	48	30	1,268	18,708	18,708	18,708	-	-	17,440	7%
5915 Postage and Delivery	78	-	73	835	1,236	1,236	1,236	-	-	401	68%
5920 Communications - Telephone & Fax	-	-	-	-	515	515	515	-	-	515	0%
SUBTOTAL - Services & Other Operating Exp.	43,554	77,634	52,998	465,886	1,395,217	1,488,163	1,489,748	(1,585)	(94,531)	1,023,863	31%
Capital Outlay & Depreciation											
6900 Depreciation	1,518	1,518	1,518	15,176	11,897	11,897	11,897	-	-	(3,279)	128%
SUBTOTAL - Capital Outlay & Depreciation	1,518	1,518	1,518	15,176	11,897	11,897	11,897	-	-	(3,279)	128%
Other Outflows & Amortization											
7999 Uncategorized Expense	-	-	-	388	-	-	-	-	-	(388)	
SUBTOTAL - Other Outflows & Amortization	-	-	-	388	-	-	-	-	-	(388)	
TOTAL EXPENSES	441,247	478,908	432,444	4,175,080	5,830,447	5,826,203	5,827,907	(1,704)	2,540	1,652,827	72%

BOA
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As of Apr FY2026

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
SUMMARY											
Revenue											
LCFF Entitlement	421,022	471,127	564,216	3,731,026	5,216,212	5,190,183	5,190,183	-	(26,029)	1,459,157	72%
Federal Revenue	6,233	-	-	97,091	189,757	207,067	207,067	-	17,310	109,976	47%
Other State Revenues	67,935	54,129	80,887	532,591	863,975	869,717	869,717	-	5,742	337,126	61%
Local Revenues	1,492	-	2,153	12,533	61,000	71,200	71,200	-	10,200	58,667	18%
Fundraising and Grants	10,090	-	433	14,121	8,500	15,000	15,000	-	6,500	879	94%
Total Revenue	506,772	525,256	647,689	4,387,362	6,339,444	6,353,167	6,353,167	-	13,723	1,965,805	69%
Expenses											
Compensation and Benefits	416,903	413,184	384,489	3,845,870	4,530,200	4,585,536	4,585,536	-	(55,336)	739,666	84%
Books and Supplies	4,049	9,753	5,538	133,273	179,518	190,085	191,297	(1,212)	(11,779)	58,023	70%
Services and Other Operating Expenditures	26,660	50,185	23,277	331,126	1,369,434	1,469,024	1,471,162	(2,138)	(101,729)	1,140,036	23%
Depreciation	(177)	(177)	(177)	(1,771)	8,439	8,439	8,439	-	-	10,210	-21%
Other Outflows & Amortization	-	-	-	561	-	-	-	-	-	(561)	
Total Expenses	447,435	472,945	413,128	4,309,060	6,087,590	6,253,084	6,256,434	(3,350)	(168,844)	1,947,375	69%
Net Income	59,337	52,311	234,561	78,303	251,854	100,083	96,733	(3,350)	(155,121)	18,430	
Fund Balance											
Beginning Balance (Unaudited)					1,755,087	1,887,090	1,887,090	-	132,003		
Net Income					251,854	100,083	96,733	(3,350)	(155,121)		
Ending Fund Balance					2,006,941	1,987,173	1,983,823	(3,350)	(23,118)		
Fund Balance as a % of Expenses					33%	32%	32%	0%	-1%		
KEY ASSUMPTIONS											
Enrollment Summary											
K-3					244	244	244	-	-		
4-6					122	122	122	-	-		
7-8					82	82	82	-	-		
Total Enrolled					448	448	448	-	-		
ADA %											
K-3					94.0%	93.6%	93.6%	0.0%	-0.4%		
4-6					94.0%	93.2%	93.2%	0.0%	-0.8%		
7-8					94.0%	92.8%	92.8%	0.0%	-1.2%		
Average ADA %					94.0%	93.3%	93.3%	0.0%	-0.7%		
ADA											
K-3					229.36	228.36	228.36	-	(1.00)		
4-6					114.68	113.68	113.68	-	(1.00)		
7-8					77.08	76.08	76.08	-	(1.00)		
Total ADA					421.12	418.12	418.12	-	(3.00)		
REVENUE											
LCFF Entitlement											
8011 Charter Schools General Purpose Entitlement - State Aid	364,273	400,206	400,206	3,026,523	4,190,953	4,172,228	4,172,228	-	(18,725)	1,145,705	73%

BOA
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		Actual			YTD	Budget & Forecast						
		Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
8012	Education Protection Account Entitlement	-	-	22,708	63,197	84,224	83,624	83,624	-	(600)	20,427	76%
8019	State Aid - Prior Years	(14,172)	-	-	(14,172)	-	-	-	-	-	14,172	
8096	Charter Schools in Lieu of Property Taxes	70,921	70,921	141,302	655,478	941,035	934,331	934,331	-	(6,704)	278,853	70%
	SUBTOTAL - LCFF Entitlement	421,022	471,127	564,216	3,731,026	5,216,212	5,190,183	5,190,183	-	(26,029)	1,459,157	72%
Federal Revenue												
8181	Special Education - Entitlement	-	-	-	-	91,631	91,631	91,631	-	-	91,631	0%
8291	Title I	-	-	-	39,784	50,531	50,531	50,531	-	-	10,747	79%
8292	Title II	3,733	-	-	6,072	8,670	8,670	8,670	-	-	2,598	70%
8294	Title IV	2,500	-	-	5,000	10,000	10,000	10,000	-	-	5,000	50%
8296	SRSA Grant	-	-	-	46,235	28,925	46,235	46,235	-	17,310	-	100%
	SUBTOTAL - Federal Revenue	6,233	-	-	97,091	189,757	207,067	207,067	-	17,310	109,976	47%
Other State Revenue												
8319	Other State Apportionments - Prior Years	-	-	-	1,370	-	-	-	-	-	(1,370)	
8381	Special Education - Entitlement (State)	42,145	14,515	14,515	114,880	180,986	180,986	180,986	-	-	66,106	63%
8382	Special Education Reimbursement (State)	3,093	3,390	3,390	25,679	33,568	35,435	35,435	-	1,867	9,756	72%
8550	Mandated Cost Reimbursements	-	-	-	8,308	8,309	8,309	8,309	-	-	1	100%
8560	State Lottery Revenue	-	-	-	33,538	120,077	118,785	118,785	-	(1,292)	85,247	28%
8590	All Other State Revenue	-	4,933	31,691	147,527	231,527	231,247	231,247	-	(280)	83,720	64%
8591	Prop 28 Arts & Music in Schools	6,046	6,056	6,056	49,060	60,188	67,018	67,018	-	6,831	17,958	73%
8593	ELO-Program	16,651	25,236	25,236	152,229	229,321	227,937	227,937	-	(1,384)	75,708	67%
	SUBTOTAL - Other State Revenue	67,935	54,129	80,887	532,591	863,975	869,717	869,717	-	5,742	337,126	61%
Local Revenue												
8660	Interest	1,492	-	-	5,235	1,000	6,000	6,000	-	5,000	765	87%
8689	FUA Reimbursement	-	-	-	-	60,000	60,000	60,000	-	-	60,000	0%
8699	All Other Local Revenue	-	-	153	5,298	-	5,200	5,200	-	5,200	(98)	102%
8999	Uncategorized Revenue	-	-	2,000	2,000	-	-	-	-	-	(2,000)	
	SUBTOTAL - Local Revenue	1,492	-	2,153	12,533	61,000	71,200	71,200	-	10,200	58,667	18%
Fundraising and Grants												
8801	Donations - Parents	10,000	-	-	10,320	-	10,500	10,500	-	10,500	180	98%
8803	Fundraising	90	-	433	3,801	8,500	4,500	4,500	-	(4,000)	699	84%
	SUBTOTAL - Fundraising and Grants	10,090	-	433	14,121	8,500	15,000	15,000	-	6,500	879	94%
TOTAL REVENUE		506,772	525,256	647,689	4,387,362	6,339,444	6,353,167	6,353,167	-	13,723	1,965,805	69%
EXPENSES												
Compensation & Benefits												
Certificated Salaries												
1100	Teachers Salaries	118,757	118,377	119,515	1,135,642	1,370,400	1,250,619	1,250,619	-	119,781	114,977	91%
1101	Teacher - Stipends	-	125	325	52,607	55,129	62,629	62,629	-	(7,500)	10,022	84%
1103	Teacher - Substitute Pay	17,402	14,682	10,831	118,991	107,400	140,000	140,000	-	(32,600)	21,009	85%
1111	Teacher - Specialist	29,829	29,016	26,896	275,182	265,420	307,090	307,090	-	(41,670)	31,908	90%
1148	Teacher - Special Ed	26,377	25,317	26,377	254,870	329,796	294,813	294,813	-	34,983	39,943	86%
1150	Teacher - Intervention	19,718	19,317	18,486	170,008	248,206	191,899	191,899	-	56,307	21,891	89%
1300	Certificated Supervisor & Administrator Salaries	23,594	23,594	23,594	241,395	283,126	283,127	283,127	-	(0)	41,732	85%

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	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current	Approved Budget v1 vs. Current	Current Forecast Remaining	% Current Forecast Spent
								Forecast	Forecast	Forecast	
SUBTOTAL - Certificated Salaries	235,677	230,428	226,023	2,248,694	2,659,478	2,530,176	2,530,176	-	129,302	281,482	89%
Classified Salaries											
2100 Classified Instructional Aide Salaries	34,428	37,746	30,586	330,136	460,044	542,238	542,238	-	(82,194)	212,102	61%
2103 Classified - Special Education	28,174	27,979	21,794	190,313	232,736	225,688	225,688	-	7,048	35,375	84%
2400 Classified Clerical & Office Salaries	12,236	11,347	10,069	109,304	122,127	135,470	135,470	-	(13,343)	26,166	81%
2930 Other Classified - Maintenance/grounds	3,909	3,724	4,065	42,084	48,418	48,418	48,418	-	-	6,334	87%
2935 Other Classified - Substitute	7,947	6,601	5,230	51,350	18,540	55,000	55,000	-	(36,460)	3,650	93%
SUBTOTAL - Classified Salaries	86,694	87,396	71,744	723,187	881,866	1,006,815	1,006,815	-	(124,949)	283,627	72%
Employee Benefits											
3100 STRS	44,912	44,168	43,374	414,338	488,920	469,709	469,709	-	19,211	55,371	88%
3300 OASDI-Medicare-Alternative	10,069	9,874	8,627	84,428	112,206	118,109	118,109	-	(5,903)	33,681	71%
3400 Health & Welfare Benefits	34,245	36,628	31,126	335,336	330,269	402,000	402,000	-	(71,731)	66,664	83%
3500 Unemployment Insurance	2,633	1,996	910	14,312	18,114	19,770	19,770	-	(1,656)	5,458	72%
3600 Workers Comp Insurance	2,673	2,673	2,673	25,489	35,413	35,370	35,370	-	44	9,880	72%
3900 403b contribution	-	21	11	85	3,935	3,588	3,588	-	348	3,502	2%
SUBTOTAL - Employee Benefits	94,532	95,360	86,722	873,989	988,857	1,048,546	1,048,546	-	(59,689)	174,557	83%
Books & Supplies											
4100 Approved Textbooks & Core Curricula Materials	221	3,926	-	20,375	50,803	53,028	53,028	-	(2,225)	32,653	38%
4200 Books & Other Reference Materials	43	510	3,744	9,604	5,742	5,860	7,029	(1,169)	(1,287)	(2,575)	137%
4300 Materials & Supplies	31	242	43	2,489	4,032	4,032	4,032	-	-	1,543	62%
4320 Educational Software	-	-	39	28,330	25,000	28,500	28,500	-	(3,500)	170	99%
4325 Instructional Materials & Supplies	617	731	473	5,571	1,125	6,125	6,125	-	(5,000)	553	91%
4326 Art	502	64	-	14,247	20,000	20,000	20,000	-	-	5,753	71%
4330 Office Supplies	1,296	1,333	762	10,386	15,926	13,000	13,000	-	2,926	2,614	80%
4335 PE Supplies	73	573	15	838	2,000	2,000	2,000	-	-	1,162	42%
4346 Teacher Supplies	822	684	85	9,266	15,000	15,000	15,000	-	-	5,734	62%
4355 Science	-	-	50	5,543	5,000	5,500	5,543	(43)	(543)	0	100%
4356 Recess Supplies	-	-	-	223	400	400	400	-	-	177	56%
4410 Classroom Furniture, Equipment & Supplies	96	-	-	5,224	7,500	7,500	7,500	-	-	2,276	70%
4420 Computers: individual items less than \$5k	178	23	328	16,667	17,500	17,500	17,500	-	-	833	95%
4430 Non Classroom Related Furniture, Equipment & Supplies	170	1,174	-	2,051	8,240	8,240	8,240	-	-	6,189	25%
4710 Student Food Services	-	-	-	-	400	400	400	-	-	400	0%
4720 Other Food	-	493	-	2,459	850	3,000	3,000	-	(2,150)	541	82%
SUBTOTAL - Books and Supplies	4,049	9,753	5,538	133,273	179,518	190,085	191,297	(1,212)	(11,779)	58,023	70%
Services & Other Operating Expenses											
5210 Conference Fees	1,610	-	-	1,610	100	1,700	1,700	-	(1,600)	90	95%
5215 Travel - Mileage, Parking, Tolls	305	1,300	-	2,210	300	2,500	2,500	-	(2,200)	290	88%
5220 Travel and Lodging	1,277	3,315	491	5,335	2,500	5,000	5,000	-	(2,500)	(335)	107%
5225 Travel - Meals & Entertainment	212	699	22	1,222	515	1,200	1,200	-	(685)	(22)	102%
5305 Dues & Membership - Professional	40	-	-	1,463	750	1,500	1,500	-	(750)	37	98%
5400 Insurance	-	-	-	-	4,940	4,940	4,940	-	-	4,940	0%
5515 Janitorial, Gardening Services & Supplies	-	-	-	581	2,250	1,000	1,000	-	1,250	419	58%
5610 Rent	-	-	-	352	317,770	317,770	317,770	-	-	317,418	0%
5619 Non-Cash Lease Adjustment	-	-	-	-	(23,876)	(23,876)	(23,876)	-	-	(23,876)	0%
5812 Business Services	7,219	7,323	7,219	72,785	-	90,957	90,957	-	(90,957)	18,171	80%
5820 Non-Instructional Consultants	637	-	-	21,981	2,400	22,149	22,149	-	(19,749)	168	99%

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	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current
					Budget v1	Forecast	Forecast	Forecast vs. Current	Budget v1 vs. Current	Forecast Remaining	Forecast Spent
5824 District Oversight Fees	-	-	-	-	52,162	51,902	51,902	-	260	51,902	0%
5830 Field Trips Expenses	219	1,727	510	15,687	51,444	51,444	51,444	-	-	35,757	30%
5836 Fingerprinting	-	-	75	541	453	467	541	(75)	(89)	(0)	100%
5839 Fundraising Expenses	-	-	754	1,135	7,210	7,210	7,210	-	-	6,075	16%
5845 Legal Fees	383	140	423	17,451	6,628	17,028	17,451	(423)	(10,823)	(0)	100%
5851 Marketing and Student Recruiting	713	20	625	1,963	2,000	2,000	2,000	-	-	37	98%
5854 Consultants - CALPADS	3,446	1,946	446	8,963	500	11,000	11,000	-	(10,500)	2,038	81%
5857 Payroll Fees	1,316	-	-	5,949	7,407	7,407	7,407	-	-	1,458	80%
5858 CMO Services	-	-	-	-	700,632	649,374	651,015	(1,641)	49,618	651,015	0%
5860 Printing and Reproduction	917	3,742	1,880	17,123	22,111	22,111	22,111	-	-	4,988	77%
5861 Prior Yr Exp (not accrued)	-	1,061	-	6,402	7,500	7,500	7,500	-	-	1,098	85%
5863 Professional Development	-	14,386	-	41,920	50,085	50,085	50,085	-	0	8,165	84%
5869 Special Education Contract Instructors	7,536	9,288	10,048	73,064	111,031	111,031	111,031	-	-	37,967	66%
5875 Staff Recruiting	-	311	-	502	618	618	618	-	-	116	81%
5877 Student Activities	242	824	280	9,484	15,000	15,000	15,000	-	-	5,516	63%
5878 Student Assessment	-	1,328	-	2,509	8,659	4,479	4,479	-	4,180	1,970	56%
5880 Student Health Services	83	186	-	1,627	2,060	2,060	2,060	-	-	433	79%
5881 Student Information System	473	2,513	473	17,369	4,858	21,884	21,884	-	(17,026)	4,515	79%
5887 Technology Services	-	-	-	-	8,925	8,925	8,925	-	-	8,925	0%
5910 Communications - Internet / Website Fees	32	50	32	758	1,337	1,337	1,337	-	-	579	57%
5915 Postage and Delivery	3	26	-	1,141	1,055	1,213	1,213	-	(158)	72	94%
5920 Communications - Telephone & Fax	-	-	-	-	110	110	110	-	-	110	0%
SUBTOTAL - Services & Other Operating Exp.	26,660	50,185	23,277	331,126	1,369,434	1,469,024	1,471,162	(2,138)	(101,729)	1,140,036	23%
Capital Outlay & Depreciation											
6900 Depreciation	(177)	(177)	(177)	(1,771)	8,439	8,439	8,439	-	-	10,210	-21%
SUBTOTAL - Capital Outlay & Depreciation	(177)	(177)	(177)	(1,771)	8,439	8,439	8,439	-	-	10,210	-21%
Other Outflows & Amortization											
7999 Uncategorized Expense	-	-	-	561	-	-	-	-	-	(561)	
SUBTOTAL - Other Outflows & Amortization	-	-	-	561	-	-	-	-	-	(561)	
TOTAL EXPENSES	447,435	472,945	413,128	4,309,060	6,087,590	6,253,084	6,256,434	(3,350)	(168,844)	1,947,375	69%

CMO
Income Statement
As of Apr FY2026

	Actual			YTD	Budget & Forecast							
	Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
SUMMARY												
Revenue												
LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	-	-
Federal Revenue	-	-	-	-	-	-	-	-	-	-	-	-
Other State Revenues	-	-	-	-	-	-	-	-	-	-	-	-
Local Revenues	9,544	16,247	12,343	118,304	1,479,656	1,379,966	1,383,124	3,158	(96,532)	1,264,820	9%	
Fundraising and Grants	-	-	200	200	-	-	-	-	-	(200)	-	
Total Revenue	9,544	16,247	12,543	118,504	1,479,656	1,379,966	1,383,124	3,158	(96,532)	1,264,620	9%	
Expenses												
Compensation and Benefits	93,969	95,195	91,368	934,027	1,041,903	1,134,980	1,134,980	-	(93,077)	200,953	82%	
Books and Supplies	248	3,881	1,579	30,751	49,410	46,564	46,735	(171)	2,675	15,984	66%	
Services and Other Operating Expenditures	3,762	6,355	10,064	168,482	388,343	198,422	201,409	(2,987)	186,934	32,927	84%	
Depreciation	-	-	-	-	-	-	-	-	-	-	-	
Other Outflows & Amortization	-	-	-	-	-	-	-	-	-	-	-	
Total Expenses	97,979	105,431	103,012	1,133,260	1,479,656	1,379,966	1,383,124	(3,158)	96,532	249,864	82%	
Net Income	(88,435)	(89,183)	(90,469)	(1,014,756)	(0)	(0)	(0)	-	0	1,014,756		
Fund Balance												
Beginning Balance (Unaudited)					(2,946)	115	115	-	3,061			
Net Income					(0)	(0)	(0)	-	0			
Ending Fund Balance					(2,946)	115	115	-	3,061			
Fund Balance as a % of Expenses					0%	0%	0%	0%	0%			
KEY ASSUMPTIONS												
Enrollment Summary												
Total Enrolled					-	-	-	-	-			
ADA %												
Average ADA %												
ADA												
Total ADA					-	-	-	-	-			
REVENUE												
LCFF Entitlement												
SUBTOTAL - LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	-	
Federal Revenue												
SUBTOTAL - Federal Revenue	-	-	-	-	-	-	-	-	-	-	-	
Other State Revenue												
SUBTOTAL - Other State Revenue	-	-	-	-	-	-	-	-	-	-	-	
Local Revenue												
8676 After School Program Revenue	9,544	11,050	12,192	113,015	130,000	130,000	130,000	-	-	16,985	87%	

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		Actual			YTD	Budget & Forecast						
		Feb	Mar	Apr	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
8699	All Other Local Revenue	-	5,197	151	5,289	-	-	-	-	-	(5,289)	
8721	CMO Fees Revenue	-	-	-	-	1,349,656	1,249,966	1,253,124	3,158	(96,532)	1,253,124	0%
SUBTOTAL - Local Revenue		9,544	16,247	12,343	118,304	1,479,656	1,379,966	1,383,124	3,158	(96,532)	1,264,820	9%
Fundraising and Grants												
8803	Fundraising	-	-	200	200	-	-	-	-	-	(200)	
SUBTOTAL - Fundraising and Grants		-	-	200	200	-	-	-	-	-	(200)	
TOTAL REVENUE		9,544	16,247	12,543	118,504	1,479,656	1,379,966	1,383,124	3,158	(96,532)	1,264,620	9%
EXPENSES												
Compensation & Benefits												
Certificated Salaries												
1101	Teacher - Stipends	-	1,000	-	15,394	13,524	25,000	25,000	-	(11,476)	9,606	62%
1150	Teacher - Intervention	851	851	851	7,564	8,826	9,574	9,574	-	(748)	2,010	79%
1300	Certificated Supervisor & Administrator Salaries	15,861	15,861	15,861	167,248	191,754	191,754	191,754	-	-	24,506	87%
SUBTOTAL - Certificated Salaries		16,712	17,712	16,712	190,206	214,103	226,327	226,327	-	(12,224)	36,122	84%
Classified Salaries												
2400	Classified Clerical & Office Salaries	26,745	26,540	25,082	264,649	298,939	303,423	303,423	-	(4,484)	38,774	87%
2905	Other Classified - After School	30,737	30,513	31,128	290,456	320,512	387,413	387,413	-	(66,901)	96,957	75%
SUBTOTAL - Classified Salaries		57,482	57,053	56,211	555,105	619,451	690,836	690,836	-	(71,384)	135,731	80%
Employee Benefits												
3100	STRS	3,192	3,383	3,192	34,083	40,894	43,229	43,229	-	(2,335)	9,145	79%
3300	OASDI-Medicare-Alternative	4,606	4,545	4,500	44,087	50,493	56,131	56,131	-	(5,638)	12,044	79%
3400	Health & Welfare Benefits	7,603	8,254	6,752	70,163	64,348	64,348	64,348	-	-	(5,815)	109%
3500	Unemployment Insurance	601	458	221	3,221	6,671	7,331	7,331	-	(659)	4,110	44%
3600	Workers Comp Insurance	639	639	639	5,752	8,336	9,172	9,172	-	(836)	3,419	63%
3900	403b contribution	3,134	3,151	3,143	31,410	37,607	37,607	37,607	-	0	6,197	84%
SUBTOTAL - Employee Benefits		19,776	20,430	18,446	188,716	208,348	217,816	217,816	-	(9,468)	29,100	87%
Books & Supplies												
4200	Books & Other Reference Materials	-	-	38	38	-	-	38	(38)	(38)	0	100%
4330	Office Supplies	51	149	209	2,593	1,326	2,400	2,533	(133)	(1,207)	(60)	102%
4352	After School Program	65	802	266	19,529	33,660	33,660	33,660	-	-	14,131	58%
4420	Computers: individual items less than \$5k	-	2,131	-	2,211	2,754	2,754	2,754	-	-	543	80%
4430	Non Classroom Related Furniture, Equipment & Supplies	81	104	-	630	1,020	800	800	-	220	170	79%
4710	Student Food Services	-	-	-	-	450	450	450	-	-	450	0%
4720	Other Food	50	696	1,067	5,751	10,200	6,500	6,500	-	3,700	749	88%
SUBTOTAL - Books and Supplies		248	3,881	1,579	30,751	49,410	46,564	46,735	(171)	2,675	15,984	66%
Services & Other Operating Expenses												
5210	Conference Fees	-	-	-	12,849	12,240	12,849	12,849	-	(609)	-	100%
5215	Travel - Mileage, Parking, Tolls	388	1,731	200	5,158	4,162	5,000	5,158	(158)	(996)	(0)	100%
5220	Travel and Lodging	-	2,245	79	7,343	12,750	10,000	10,000	-	2,750	2,657	73%
5225	Travel - Meals & Entertainment	37	166	45	1,565	1,530	1,530	1,530	-	-	(35)	102%
5305	Dues & Membership - Professional	-	1,367	683	7,644	10,437	10,437	10,437	-	-	2,793	73%

CMO
Income Statement
As of Apr FY2026

	Actual			YTD	Budget & Forecast						
	Feb	Mar	Apr	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current
					Budget v1	Forecast		Forecast vs. Current	Budget v1 vs. Current		
5400 Insurance	-	-	-	51,651	50,497	51,651	51,651	-	(1,154)	-	100%
5515 Janitorial, Gardening Services & Supplies	200	171	192	2,821	2,520	3,600	3,600	-	(1,080)	779	78%
5535 Utilities - All Utilities	237	227	297	3,342	3,308	3,600	3,600	-	(293)	258	93%
5610 Rent	1,000	1,000	1,000	11,362	12,240	12,603	12,603	-	(363)	1,241	90%
5615 Repairs and Maintenance - Building	-	-	-	-	684	684	684	-	-	684	0%
5619 Non-Cash Lease Adjustment	-	-	-	-	(373)	(373)	(373)	-	-	(373)	0%
5803 Accounting Fees	-	(3,150)	-	12,409	26,417	26,417	26,417	-	-	14,008	47%
5809 Banking Fees	370	1,237	1,631	6,653	2,000	6,000	6,000	-	(4,000)	(653)	111%
5812 Business Services	5	-	-	5	181,913	-	-	-	181,913	(5)	
5820 Non-Instructional Consultants	-	297	-	1,426	2,305	2,030	2,030	-	275	604	70%
5830 Field Trips Expenses	-	-	-	1,944	-	2,000	2,000	-	(2,000)	56	97%
5836 Fingerprinting	-	-	-	-	110	110	110	-	-	110	0%
5845 Legal Fees	-	228	662	4,445	20,400	5,000	5,000	-	15,400	555	89%
5848 Licenses and Other Fees	-	-	-	5	27	27	27	-	-	22	19%
5851 Marketing and Student Recruiting	-	-	-	100	765	765	765	-	-	665	13%
5857 Payroll Fees	309	-	-	11,993	16,751	16,751	16,751	-	-	4,758	72%
5860 Printing and Reproduction	226	401	308	2,936	3,308	3,308	3,308	-	-	372	89%
5861 Prior Yr Exp (not accrued)	(8)	-	-	726	55	750	750	-	(695)	24	97%
5863 Professional Development	145	-	2,450	8,732	7,140	7,140	8,732	(1,592)	(1,592)	(0)	100%
5875 Staff Recruiting	-	-	2,220	2,237	2,040	1,000	2,237	(1,237)	(197)	0	100%
5877 Student Activities	-	-	-	1,678	935	2,500	2,500	-	(1,565)	822	67%
5910 Communications - Internet / Website Fees	587	-	-	7,617	11,967	10,945	10,945	-	1,022	3,328	70%
5915 Postage and Delivery	232	174	2	1,038	1,734	1,500	1,500	-	234	462	69%
5920 Communications - Telephone & Fax	33	261	295	804	485	600	600	-	(116)	(204)	134%
SUBTOTAL - Services & Other Operating Exp.	3,762	6,355	10,064	168,482	388,343	198,422	201,409	(2,987)	186,934	32,927	84%
Capital Outlay & Depreciation											
SUBTOTAL - Capital Outlay & Depreciation	-	-	-	-	-	-	-	-	-	-	
Other Outflows & Amortization											
SUBTOTAL - Other Outflows & Amortization	-	-	-	-	-	-	-	-	-	-	
TOTAL EXPENSES	97,979	105,431	103,012	1,133,260	1,479,656	1,379,966	1,383,124	(3,158)	96,532	249,864	82%

The Academies CMO
Monthly Cash Forecast
As of Apr FY2026

	2025-26													Forecast	Remaining Balance
	Actuals & Forecast														
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Actuals	Feb Actuals	Mar Actuals	Apr Actuals	May Forecast	Jun Forecast			
Beginning Cash	5,570,956	5,293,594	5,266,709	4,932,009	5,163,565	5,034,225	5,193,844	5,512,166	5,460,039	5,373,819	5,716,146	5,330,401			
REVENUE															
LCFF Entitlement	-	346,543	451,094	1,097,137	763,179	763,179	1,027,434	756,093	793,201	1,193,156	795,676	786,914	9,869,802	1,096,199	
Federal Revenue	-	-	-	26,688	9,728	-	147,146	12,463	-	-	36,018	180,071	417,310	5,196	
Other State Revenue	-	26,800	26,800	107,071	76,107	237,796	160,791	131,842	102,245	155,157	160,375	273,810	1,809,431	350,637	
Other Local Revenue	12,201	19,097	14,310	16,197	20,057	13,323	6,871	12,468	16,345	14,748	(709)	1,386,039	1,530,948	-	
Fundraising & Grants	-	1,053	1,780	2,496	826	1,029	-	10,090	-	849	2,178	2,198	22,500	-	
TOTAL REVENUE	12,201	393,493	493,984	1,249,589	869,897	1,015,327	1,342,242	922,956	911,791	1,363,909	993,539	2,629,032	13,649,992	1,452,031	
EXPENSES															
Certificated Salaries	257,615	504,666	474,120	489,226	484,109	498,458	452,396	474,874	472,421	461,978	78,894	492,532	5,141,289	-	
Classified Salaries	143,625	122,203	231,680	235,313	231,188	184,266	119,985	225,288	222,518	195,452	321,630	212,238	2,445,386	-	
Employee Benefits	116,127	189,109	197,560	200,070	199,926	208,359	195,786	205,267	208,894	188,942	187,269	240,207	2,337,516	-	
Books & Supplies	50,713	72,490	33,542	27,079	12,885	3,277	7,761	5,915	17,935	14,532	55,082	58,919	360,618	488	
Services & Other Operating Expenses	164,395	46,338	96,040	94,967	99,414	64,924	104,928	73,976	134,174	86,339	191,523	1,885,742	3,162,320	119,561	
Capital Outlay & Depreciation	-	-	-	-	-	8,043	1,341	1,341	1,341	1,341	10,498	(3,567)	20,336	-	
Other Outflows	-	350	-	-	-	600	-	-	-	-	(950)	-	-	-	
TOTAL EXPENSES	732,475	935,156	1,032,941	1,046,655	1,027,522	967,926	882,196	986,661	1,057,283	948,584	843,946	2,886,072	13,467,466	120,049	
Operating Cash Inflow (Outflow)	(720,274)	(541,663)	(538,957)	202,934	(157,625)	47,401	460,046	(63,705)	(145,492)	415,325	149,592	(257,039)	182,526	1,331,983	
Accounts Receivable	1,063,996	571,338	171,149	45,389	825	(853)	5,864	(182,194)	145,000	(113,218)	58,230	9,333	-	-	
Other Current Assets	90,724	-	(400)	-	(450)	-	-	-	-	(830)	830	-	-	-	
Fixed Assets	-	-	-	(8,112)	-	8,043	1,341	1,341	1,341	1,340	18,610	(3,567)	-	-	
ROU Assets	900	-	-	-	-	-	-	-	-	-	-	-	-	-	
Accounts Payable	(580,951)	(104,887)	9,633	(40,076)	706	79,626	(167,736)	26,291	21,414	(101,421)	(57,269)	(46,613)	-	-	
Other Current Liabilities	103,807	21,308	(4,272)	3,677	(327)	294	(8,345)	138,940	(134,468)	122,181	(573,918)	(62,551)	-	-	
Summer Holdback	(235,564)	27,019	28,146	27,744	27,531	25,107	27,154	27,201	25,984	18,949	18,179	18,179	-	-	
Deferred Revenue	-	-	-	-	-	-	-	-	-	-	-	-	(200,000)	-	
ROU Long-Term Liabilities	-	-	-	-	-	-	-	-	-	-	-	-	(200,000)	-	
Ending Cash	5,293,594	5,266,709	4,932,009	5,163,565	5,034,225	5,193,844	5,512,166	5,460,039	5,373,819	5,716,146	5,330,401	4,588,144			

The Academies CMO
Balance Sheet
As of Apr FY2026

	Jun FY25				Apr FY26				Projected Jun FY26			
	SVA	BOA	CMO	Total	SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
ASSETS												
Cash Balance	2,855,241	2,673,981	41,734	5,570,956	3,291,294	3,391,518	(966,665)	5,716,146	2,040,656	2,541,135	6,354	4,588,144
Accounts Receivable	1,047,781	873,078	61	1,920,920	91,714	121,849	61	213,625	989,074	609,019	-	1,598,093
Other Current Assets	43,073	47,074	577	90,724	646	204	830	1,680	646	204	-	850
Fixed Assets	154,372	29,217	-	183,589	139,196	39,100	-	178,296	142,475	20,778	-	163,252
Other Assets	-	-	1,000	1,000	-	-	1,000	1,000	-	-	1,000	1,000
ROU Assets	4,696,462	4,996,918	9,375	9,702,755	4,696,462	4,996,918	8,475	9,701,855	4,696,462	4,996,918	8,475	9,701,855
TOTAL ASSETS	8,796,929	8,620,268	52,748	17,469,944	8,219,312	8,549,589	(956,299)	15,812,602	7,869,312	8,168,053	15,829	16,053,194
LIABILITIES & EQUITY												
Accounts Payable	632,093	295,365	33,825	961,282	73,032	20,239	10,611	103,882	48,197	71,363	488	120,049
Other Current Liabilities	228,156	155,364	10,153	393,674	334,905	268,956	32,607	636,469	-	-	-	-
Summer Holdback	137,938	97,866	(240)	235,564	118,190	110,418	6,229	234,837	136,580	128,285	6,331	271,196
Loans Payable (Current)	112,878	130,774	8,895	252,547	112,878	130,774	8,895	252,547	-	-	-	-
ROU Current Liabilities	-	-	-	-	-	-	-	-	112,878	130,774	8,895	252,547
Deferred Revenue	650,851	543,014	-	1,193,865	650,851	543,014	-	1,193,865	450,851	543,014	-	993,865
ROU Long-Term Liabilities	4,756,655	5,510,795	-	10,267,450	4,756,655	5,510,795	-	10,267,450	4,756,655	5,310,795	-	10,067,450
Beginning Net Assets	2,270,993	1,528,860	(2,946)	3,796,907	2,278,357	1,887,090	115	4,165,562	2,278,357	1,887,090	115	4,165,562
Net Income (Loss) to Date	7,364	358,230	3,061	368,655	(105,557)	78,303	(1,014,756)	(1,042,010)	85,793	96,733	(0)	182,526
TOTAL LIABILITIES & EQUITY	8,796,929	8,620,268	52,748	17,469,944	8,219,312	8,549,589	(956,299)	15,812,602	7,869,312	8,168,053	15,829	16,053,194

The Academies CMO
Multi-year Projection
As of Apr FY2026

	Year 1 2025-26				Year 2 2026-27			
	Current Year Forecast				Preliminary Budget			
	SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
SUMMARY								
Revenue								
LCFF Entitlement	4,679,619	5,190,183	-	9,869,802	4,821,161	5,350,683	-	10,171,845
Federal Revenue	210,243	207,067	-	417,310	209,282	210,061	-	419,343
Other State Revenues	939,714	869,717	-	1,809,431	902,499	884,461	-	1,786,960
Local Revenues	76,624	71,200	1,383,124	1,530,948	76,624	66,000	1,461,271	1,603,895
Fundraising and Grants	7,500	15,000	-	22,500	7,500	15,000	-	22,500
Total Revenue	5,913,700	6,353,167	1,383,124	13,649,992	6,017,066	6,526,205	1,461,271	14,004,542
Expenses								
Compensation and Benefits	4,203,675	4,585,536	1,134,980	9,924,191	4,474,280	4,901,222	1,208,089	10,583,591
Books and Supplies	122,587	191,297	46,735	360,618	125,087	166,531	46,806	338,424
Services and Other Operating Expenditures	1,489,748	1,471,162	201,409	3,162,320	1,457,042	1,443,952	206,375	3,107,369
Depreciation	11,897	8,439	-	20,336	11,897	8,439	-	20,336
Other Outflows	-	-	-	-	-	-	-	-
Total Expenses	5,827,907	6,256,434	1,383,124	13,467,466	6,068,307	6,520,143	1,461,271	14,049,720
Net Income	85,793	96,733	(0)	182,526	(51,241)	6,062	(0)	(45,178)
Fund Balance								
Beginning Balance (Unaudited)	2,278,357	1,887,090	115	4,165,562	2,364,150	1,983,823	115	4,348,088
Audit Adjustment	-	-	-	-	-	-	-	-
Beginning Balance (Audited)	2,278,357	1,887,090	115	4,165,562	2,364,150	1,983,823	115	4,348,088
Net Income	85,793	96,733	(0)	182,526	(51,241)	6,062	(0)	(45,178)
Ending Fund Balance	2,364,150	1,983,823	115	4,348,088	2,312,910	1,989,885	115	4,302,910
Total Revenue Per ADA	15,292	15,195		16,960	15,590	15,497		17,352
Total Expenses Per ADA	15,070	14,963		16,733	15,723	15,483		17,408
Net Income Per ADA	222	231		227	(133)	14		(56)
Fund Balance as a % of Expenses	41%	32%	0%	32%	38%	31%	0%	31%

The Academies CMO
Multi-year Projection
As of Apr FY2026

Year 1 2025-26				Year 2 2026-27			
Current Year Forecast				Preliminary Budget			
SVA	BOA	CMO	Total	SVA	BOA	CMO	Total

Key Assumptions

Enrollment Breakdown

TK	20	40	-	60	20	40	-	60
K	44	48	-	92	44	48	-	92
1	44	50	-	94	44	50	-	94
2	44	52	-	96	44	52	-	96
3	44	54	-	98	44	54	-	98
4	47	42	-	89	47	42	-	89
5	49	42	-	91	49	42	-	91
6	45	38	-	83	45	38	-	83
7	45	36	-	81	45	36	-	81
8	33	46	-	79	33	46	-	79
Total Enrolled	415	448	-	863	415	448	-	863

ADA %

K-3	93.2%	93.6%		93.4%	93.0%	94.0%		93.6%
4-6	93.2%	93.2%		93.2%	93.0%	94.0%		93.5%
7-8	93.2%	92.8%		93.0%	93.0%	94.0%		93.5%
Average ADA %	93.2%	93.3%		93.3%	93.0%	94.0%		93.5%

ADA

K-3	182.6	228.4	-	411.0	182.3	229.4	-	411.6
4-6	131.4	113.7	-	245.1	131.1	114.7	-	245.8
7-8	72.7	76.1	-	148.8	72.5	77.1	-	149.6
Total ADA	386.7	418.1	-	804.8	386.0	421.1	-	807.1

The Academies CMO
Multi-year Projection
As of Apr FY2026

		Year 1 2025-26				Year 2 2026-27			
		Current Year Forecast				Preliminary Budget			
		SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
REVENUE									
LCFF Entitlement									
8011	Charter Schools General Purpose Entitlement - State Aid	2,818,831	4,172,228	-	6,991,059	2,940,058	4,325,425	-	7,265,483
8012	Education Protection Account Entitlement	996,646	83,624	-	1,080,270	1,018,659	84,224	-	1,102,883
8096	Charter Schools in Lieu of Property Taxes	864,142	934,331	-	1,798,473	862,444	941,035	-	1,803,479
	SUBTOTAL - LCFF Entitlement	4,679,619	5,190,183	-	9,869,802	4,821,161	5,350,683	-	10,171,845
Federal Revenue									
8181	Special Education - Entitlement	88,440	91,631	-	180,071	87,479	94,625	-	182,104
8291	Title I	55,325	50,531	-	105,856	55,325	50,531	-	105,856
8292	Title II	9,547	8,670	-	18,217	9,547	8,670	-	18,217
8294	Title IV	10,000	10,000	-	20,000	10,000	10,000	-	20,000
8296	SRSA Grant	46,931	46,235	-	93,166	46,931	46,235	-	93,166
	SUBTOTAL - Federal Revenue	210,243	207,067	-	417,310	209,282	210,061	-	419,343
Other State Revenue									
8319	Other State Apportionments - Prior Years	1,313	-	-	1,313	-	-	-	-
8381	Special Education - Entitlement (State)	175,932	180,986	-	356,918	174,020	186,900	-	360,919
8382	Special Education Reimbursement (State)	32,773	35,435	-	68,208	32,709	35,689	-	68,398
8550	Mandated Cost Reimbursements	8,023	8,309	-	16,332	8,125	8,785	-	16,909
8560	State Lottery Revenue	109,862	118,785	-	228,647	109,646	119,637	-	229,283
8590	All Other State Revenue	359,844	231,247	-	591,091	267,877	196,617	-	464,494
8591	Prop 28 Arts & Music in Schools	65,523	67,018	-	132,541	68,479	70,308	-	138,788
8593	ELO-Program	186,445	227,937	-	414,382	241,644	266,524	-	508,168
	SUBTOTAL - Other State Revenue	939,714	869,717	-	1,809,431	902,499	884,461	-	1,786,960
Local Revenue									
8660	Interest	5,000	6,000	-	11,000	5,000	6,000	-	11,000
8676	After School Program Revenue	-	-	130,000	130,000	-	-	130,000	130,000
8689	FUA Reimbursement	71,624	60,000	-	131,624	71,624	60,000	-	131,624
8699	All Other Local Revenue	-	5,200	-	5,200	-	-	-	-
8721	CMO Fees Revenue	-	-	1,253,124	1,253,124	-	-	1,331,271	1,331,271
	SUBTOTAL - Local Revenue	76,624	71,200	1,383,124	1,530,948	76,624	66,000	1,461,271	1,603,895
Fundraising and Grants									
8801	Donations - Parents	-	10,500	-	10,500	-	10,500	-	10,500
8803	Fundraising	7,500	4,500	-	12,000	7,500	4,500	-	12,000
	SUBTOTAL - Fundraising and Grants	7,500	15,000	-	22,500	7,500	15,000	-	22,500

The Academies CMO
Multi-year Projection
As of Apr FY2026

TOTAL REVENUE

Year 1 2025-26				Year 2 2026-27			
Current Year Forecast				Preliminary Budget			
SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
5,913,700	6,353,167	1,383,124	13,649,992	6,017,066	6,526,205	1,461,271	14,004,542

The Academies CMO
Multi-year Projection
As of Apr FY2026

Year 1 2025-26				Year 2 2026-27			
Current Year Forecast				Preliminary Budget			
SVA	BOA	CMO	Total	SVA	BOA	CMO	Total

EXPENSES

Compensation & Benefits

Certificated Salaries

1100	Teachers Salaries	1,050,421	1,250,619	-	2,301,039	1,130,704	1,355,735	-	2,486,439
1101	Teacher - Stipends	71,732	62,629	25,000	159,362	74,243	64,821	25,875	164,939
1103	Teacher - Substitute Pay	75,000	140,000	-	215,000	77,625	144,900	-	222,525
1111	Teacher - Specialist	280,353	307,090	-	587,442	293,722	319,567	-	613,289
1148	Teacher - Special Ed	324,276	294,813	-	619,090	380,451	367,004	-	747,455
1150	Teacher - Intervention	298,650	191,899	9,574	500,122	307,968	183,722	8,254	499,944
1300	Certificated Supervisor & Administrator Salaries	284,354	283,127	191,754	759,234	294,306	293,036	198,465	785,807
SUBTOTAL - Certificated Salaries		2,384,785	2,530,176	226,327	5,141,289	2,559,020	2,728,785	232,594	5,520,399

Classified Salaries

2100	Classified Instructional Aide Salaries	312,528	542,238	-	854,766	308,438	561,217	-	869,655
2103	Classified - Special Education	214,519	225,688	-	440,207	222,606	233,587	-	456,193
2400	Classified Clerical & Office Salaries	149,854	135,470	303,423	588,747	155,099	140,211	319,982	615,292
2905	Other Classified - After School	-	-	387,413	387,413	-	-	424,537	424,537
2930	Other Classified - Maintenance/grounds	50,835	48,418	-	99,253	52,614	50,113	-	102,727
2935	Other Classified - Substitute	20,000	55,000	-	75,000	20,700	56,925	-	77,625
SUBTOTAL - Classified Salaries		747,735	1,006,815	690,836	2,445,386	759,457	1,042,053	744,519	2,546,029

Employee Benefits

3100	STRS	449,764	469,709	43,229	962,702	488,773	507,169	44,425	1,040,367
3300	OASDI-Medicare-Alternative	93,641	118,109	56,131	267,881	95,204	123,838	60,328	279,371
3400	Health & Welfare Benefits	475,000	402,000	64,348	941,348	517,750	438,180	70,139	1,026,069
3500	Unemployment Insurance	18,124	19,770	7,331	45,225	17,676	19,775	7,389	44,840
3600	Workers Comp Insurance	31,325	35,370	9,172	75,867	33,185	37,708	9,771	80,664
3900	403b contribution	3,300	3,588	37,607	44,495	3,216	3,713	38,923	45,852
SUBTOTAL - Employee Benefits		1,071,154	1,048,546	217,816	2,337,516	1,155,803	1,130,384	230,976	2,517,163

Books & Supplies

4100	Approved Textbooks & Core Curricula Materials	25,806	53,028	-	78,834	26,835	35,030	-	61,865
4200	Books & Other Reference Materials	6,219	7,029	38	13,286	6,406	7,240	-	13,646
4300	Materials & Supplies	2,276	4,032	-	6,308	2,344	4,032	-	6,376
4320	Educational Software	30,241	28,500	-	58,741	31,148	28,500	-	59,648
4325	Instructional Materials & Supplies	-	6,125	-	6,125	-	6,309	-	6,309
4326	Art	6,000	20,000	-	26,000	6,000	20,000	-	26,000
4330	Office Supplies	9,640	13,000	2,533	25,173	9,929	13,000	2,584	25,512

The Academies CMO
Multi-year Projection
As of Apr FY2026

		Year 1 2025-26				Year 2 2026-27			
		Current Year Forecast				Preliminary Budget			
		SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
4335	PE Supplies	1,900	2,000	-	3,900	1,900	2,000	-	3,900
4346	Teacher Supplies	10,720	15,000	-	25,720	10,560	15,000	-	25,560
4352	After School Program	-	-	33,660	33,660	-	-	34,333	34,333
4355	Science	1,032	5,543	-	6,575	1,032	5,543	-	6,575
4356	Recess Supplies	-	400	-	400	-	400	-	400
4410	Classroom Furniture, Equipment & Supplies	6,000	7,500	-	13,500	6,180	-	-	6,180
4420	Computers: individual items less than \$5k	15,000	17,500	2,754	35,254	15,000	17,500	2,809	35,309
4430	Non Classroom Related Furniture, Equipment & Supplies	6,000	8,240	800	15,040	6,000	8,487	-	14,487
4710	Student Food Services	400	400	450	1,250	400	400	450	1,250
4720	Other Food	1,353	3,000	6,500	10,853	1,353	3,090	6,630	11,073
SUBTOTAL - Books and Supplies		122,587	191,297	46,735	360,618	125,087	166,531	46,806	338,424

Services & Other Operating Expenses

5210	Conference Fees	700	1,700	12,849	15,249	-	2,000	13,106	15,106
5215	Travel - Mileage, Parking, Tolls	1,368	2,500	5,158	9,026	1,368	2,500	5,261	9,129
5220	Travel and Lodging	3,000	5,000	10,000	18,000	3,000	5,000	10,200	18,200
5225	Travel - Meals & Entertainment	659	1,200	1,530	3,389	659	1,236	1,561	3,456
5305	Dues & Membership - Professional	1,500	1,500	10,437	13,437	1,500	1,500	10,958	13,958
5400	Insurance	4,940	4,940	51,651	61,531	5,089	5,089	54,233	64,410
5515	Janitorial, Gardening Services & Supplies	6,000	1,000	3,600	10,600	6,000	1,030	3,780	10,810
5525	Utilities - Waste	11,557	-	-	11,557	11,903	-	-	11,903
5535	Utilities - All Utilities	-	-	3,600	3,600	-	-	3,780	3,780
5610	Rent	274,636	317,770	12,603	605,009	274,636	317,770	12,855	605,261
5615	Repairs and Maintenance - Building	-	-	684	684	-	-	718	718
5619	Non-Cash Lease Adjustment	(6,410)	(23,876)	(373)	(30,659)	(6,410)	(23,876)	(373)	(30,659)
5803	Accounting Fees	-	-	26,417	26,417	-	-	26,945	26,945
5809	Banking Fees	1,442	-	6,000	7,442	1,485	-	6,000	7,485
5812	Business Services	90,957	90,957	-	181,913	86,625	86,625	-	173,250
5820	Non-Instructional Consultants	22,149	22,149	2,030	46,328	7,400	7,400	2,132	16,932
5824	District Oversight Fees	46,796	51,902	-	98,698	48,212	53,507	-	101,718
5830	Field Trips Expenses	30,000	51,444	2,000	83,444	30,000	52,988	-	82,988
5833	Fines and Penalties	721	-	-	721	732	-	-	732
5836	Fingerprinting	600	541	110	1,252	600	558	113	1,270
5839	Fundraising Expenses	4,500	7,210	-	11,710	4,635	7,426	-	12,061
5845	Legal Fees	10,836	17,451	5,000	33,287	10,836	17,975	5,100	33,911
5848	Licenses and Other Fees	-	-	27	27	-	-	27	27
5851	Marketing and Student Recruiting	2,060	2,000	765	4,825	2,122	2,000	780	4,902
5854	Consultants - CALPADS	12,000	11,000	-	23,000	10,710	10,710	-	21,420
5857	Payroll Fees	6,600	7,407	16,751	30,758	6,600	7,629	17,588	31,818
5858	CMO Services	602,109	651,015	-	1,253,124	636,629	694,642	-	1,331,271

The Academies CMO
Multi-year Projection
As of Apr FY2026

		Year 1 2025-26				Year 2 2026-27			
		Current Year Forecast				Preliminary Budget			
		SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
5860	Printing and Reproduction	25,510	22,111	3,308	50,928	26,275	22,774	3,473	52,522
5861	Prior Yr Exp (not accrued)	12,000	7,500	750	20,250	-	7,500	765	8,265
5863	Professional Development	49,000	50,085	8,732	107,817	50,470	51,587	8,907	110,964
5869	Special Education Contract Instructors	92,108	111,031	-	203,138	58,000	60,940	-	118,940
5875	Staff Recruiting	927	618	2,237	3,782	955	637	2,282	3,873
5877	Student Activities	6,000	15,000	2,500	23,500	6,180	15,450	2,550	24,180
5878	Student Assessment	3,000	4,479	-	7,479	3,090	4,613	-	7,703
5880	Student Health Services	1,100	2,060	-	3,160	1,100	2,122	-	3,222
5881	Student Information System	23,000	21,884	-	44,884	23,000	21,884	-	44,884
5887	Technology Services	13,925	8,925	-	22,850	5,150	-	-	5,150
5893	Transportation - Student	114,000	-	-	114,000	117,420	-	-	117,420
5910	Communications - Internet / Website Fees	18,708	1,337	10,945	30,989	19,269	1,377	11,493	32,138
5915	Postage and Delivery	1,236	1,213	1,500	3,949	1,273	1,249	1,530	4,052
5920	Communications - Telephone & Fax	515	110	600	1,225	530	110	612	1,252
	SUBTOTAL - Services & Other Operating Exp.	1,489,748	1,471,162	201,409	3,162,320	1,457,042	1,443,952	206,375	3,107,369
Depreciation Expense									
6900	Depreciation	11,897	8,439	-	20,336	11,897	8,439	-	20,336
	SUBTOTAL - Depreciation Expense	11,897	8,439	-	20,336	11,897	8,439	-	20,336
Other Outflows									
	SUBTOTAL - Other Outflows	-	-	-	-	-	-	-	-
TOTAL EXPENSES		5,827,907	6,256,434	1,383,124	13,467,466	6,068,307	6,520,143	1,461,271	14,049,720



ENCLOSURE #11

ENCLOSURE SUMMARY

Consideration of Approval for BR 26-002 Adoption of Board Resolution to Approve Amended Articles of Incorporation - Second Read

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: This item was introduced at our April Board meeting.

Beginning in 2026, Nonprofit Public Benefit Corporations that employ CalSTRS members for charter schools must comply with new California State Teachers' Retirement System (CalSTRS) certification and reporting requirements. This includes ensuring that the CMO's corporate documents state that, on dissolution, net assets go to the State, a political subdivision, or another public school/governmental entity. This Board Resolution (BR) identifies the changes made to the Articles of Incorporation and the rationale for these changes.

Included are a redlined version of the resolution and restated articles showing exactly what has been added, deleted, and modified from the previous version. A final edition of the restated articles has also been included for signature.

SUPERINTENDENT'S RECOMMENDATION: Approve

THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

A California Nonprofit Public Benefit Corporation

**RESOLUTION OF THE BOARD OF DIRECTORS
APPROVING RESTATED ARTICLES OF INCORPORATION**

Meeting Date: **May 19, 2026**

Regular Meeting of the Board of Directors

RECITALS

WHEREAS, The Academies Charter Management Organization (the “Corporation”) is a California nonprofit public benefit corporation organized and existing under the California Nonprofit Public Benefit Corporation Law (Corporations Code §§ 5110 et seq.), operating one or more California public charter schools;

WHEREAS, the Corporation was originally incorporated as Sycamore Valley Academy on October 7, 2010 (California Secretary of State Entity No. 3333673), and its corporate name was subsequently changed to The Academies Charter Management Organization pursuant to a Certificate of Amendment of Articles of Incorporation filed with the California Secretary of State on January 25, 2017;

WHEREAS, the California State Teachers’ Retirement System (“CalSTRS”) requires, as a condition of permitting employees of a nonprofit public benefit corporation (“NPBC”) operating a charter school to participate in CalSTRS, that the NPBC’s governing documents expressly provide that, upon dissolution or final liquidation of the NPBC, its net assets shall be distributed to the State of California, a political subdivision of the state, an agency or instrumentality of the state or political subdivision, or to another public school;

WHEREAS, the Board of Directors (the “Board”) has reviewed the Corporation’s existing Articles of Incorporation and has determined that, in order to clearly and expressly satisfy the CalSTRS dissolution requirement and to consolidate the original 2010 Articles of Incorporation and the 2017 amendment into a single operative instrument, it is in the best interests of the Corporation to file Restated Articles of Incorporation with the California Secretary of State;

WHEREAS, the Board has reviewed the form of Restated Articles of Incorporation attached hereto as **Exhibit A** and incorporated herein by this reference (the “Restated Articles”), which consolidates the original Articles of Incorporation as amended and includes a dissolution provision expressly satisfying the CalSTRS dissolution requirement;

WHEREAS, the Board has determined that the filing of the Restated Articles is necessary to maintain the Corporation’s employees’ continued eligibility for CalSTRS participation;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of the Corporation hereby adopts the following resolutions:

RESOLUTIONS

1. Approval of Restated Articles of Incorporation. The Board hereby approves and authorizes the filing of the Restated Articles of Incorporation in the form attached hereto as Exhibit A with the California Secretary of State, which shall consolidate and supersede the Corporation’s original Articles of Incorporation and all amendments thereto in a single operative instrument.

2. Authorization of Officers. The Chair and Secretary of the Corporation are each hereby authorized and directed, on behalf of the Corporation, to execute and cause to be filed the Restated Articles with the California Secretary of State, to pay all required filing fees, and to take any and all further actions and execute any and all documents as may be necessary or appropriate to carry out the purposes and intent of these resolutions.

SECRETARY’S CERTIFICATION

I, ALEX TIETJEN, Secretary of the Corporation, hereby certify that:

(1) The foregoing resolution was duly adopted at a regular meeting of the Board of Directors of the Corporation held on **May 19th**, 2026, at which a quorum was present and acting throughout.

(2) The vote on adoption of the foregoing resolution was as follows:

Directors Voting **IN FAVOR**:

Directors Voting **AGAINST**:

Directors **ABSTAINING**:

Directors **ABSENT**:

(3) The resolution was adopted by the affirmative vote of a majority of the directors then in office and constitutes a valid act of the Board of Directors.

IN WITNESS WHEREOF, I have executed this certification as Secretary of the Corporation.

Alex Tietjen
Secretary

Date: _____

EXHIBIT A

**RESTATED ARTICLES OF INCORPORATION
OF
THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION**
A California Nonprofit Public Benefit Corporation

The undersigned certify that:

1. They are the Chair and Secretary, **respectively**, of The Academies Charter Management Organization, a California nonprofit public benefit corporation, with **California Entity Number 3333673**.
2. The Articles of Incorporation of this corporation are amended and restated **in their entirety** to read as follows:

ARTICLE I

The name of this Corporation is The Academies Charter Management Organization.

ARTICLE II

The Corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for public and charitable purposes. The specific purposes for which this Corporation is organized are to manage, operate, guide, direct and promote one or more California public charter schools.

The Corporation is organized and operated exclusively for educational and charitable purposes pursuant to and within the meaning of Section 501(c)(3) of the Internal Revenue Code or the corresponding provision of any future United States Internal Revenue Law. Notwithstanding any other provision of these articles, the Corporation shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Corporation. The Corporation shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

ARTICLE III

This section was added as a conforming adjustment. It is non-substantive.

The name and address in the State of California of this Corporation's agent for service of process shall be as designated in the Corporation's current Statement of Information on file with the California Secretary of State, as updated from time to time in accordance with the California Corporations Code.

ARTICLE IV

All corporate property is irrevocably dedicated to the purposes set forth in the second article above. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to any of its directors, members, trustees, officers or other private persons except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the purposes set forth in Article II.

No substantial part of the activities of the Corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

These sections were deleted since the TACMO nonprofit does not have any members, which is typical of charters. The revision conforms to the actual corporate structure.

Subject to the provisions of the nonprofit public benefit provisions of the Nonprofit Corporation Law of the State of California, and any limitations in the articles or bylaws ~~relating to action to be approved by the members or by a majority of all members, if any,~~ the activities and affairs of this Corporation shall be conducted and all the powers shall be exercised by or under the direction of the board of directors.

The number of directors shall be as provided for in the bylaws. The bylaws shall prescribe the qualifications, mode of election, and term of office of directors.

~~The authorized number and qualifications of members of the corporation, if any, the different classes of membership, the property, voting and other rights and privileges of members, and their liability for dues and assessments and the method of collection thereof, shall be set forth in the bylaws.~~

ARTICLE V

This is the section that required revision in order to comply with the CalSTRS certification requirement.

Upon the dissolution or winding up of this Corporation, its assets remaining after payment of, ~~or provision for payment of,~~ all debts and liabilities of this Corporation shall be distributed to ~~a nonprofit fund, foundation, corporation or association which is organized and operated exclusively for educational, public or charitable purposes and which has established its tax exempt status under Section 504(e)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine which are organized and operate exclusively for such purposes~~ **either a public school that meets the requirement of Section III.A of IRS Notice 2015-07 or to the State of California, a political subdivision of the state, or an agency or instrumentality of the state or political subdivision, for a public purpose.**

This addition ensures that it is stated within the articles themselves that the corporation's governance structure does not have members. Line 4 below is still required as it is part of the attestation.

ARTICLE VI

This Corporation has no members within the meaning of California Corporations Code § 5056.

3. The foregoing amendment and restatement of Articles of Incorporation has been duly approved by the Board of Directors.
4. The Corporation has no members.

We further declare under penalty of perjury under the laws of the State of California that the matters set forth in this certificate are true and correct of our own knowledge.

DATE: _____

Cristina Gutierrez, Chair

Alex Tietjen, Secretary



ENCLOSURE #12

ENCLOSURE SUMMARY

Consideration of Approval of the 2026-27 TCOE Declaration of Need & Annual Statement of Need for Blue Oak Academy

FROM: Shauna Dolin

DATE: 5/14/2026

BACKGROUND: An annual required general agenda approval item from the Tulare County Office of Education. This item allows Blue Oak Academy to receive support with long- and short-term substitutes, leave requests, and credentialing services at no cost to The Academies CMO.

SUPERINTENDENT'S RECOMMENDATION: Approve.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	
Single Subject	
Special Education	
TOTAL	

Authorizations for Single Subject Limited Assignment Permits

SUBJECT	ESTIMATED NUMBER NEEDED	SUBJECT	ESTIMATED NUMBER NEEDED
Agriculture		Mathematics	
Art		Music	
Business		Physical Education	
Dance		Science: Biological Sciences	
English		Science: Chemistry	
Foundational-Level Math		Science: Geoscience	
Foundational-Level Science		Science: Physics	
Health		Social Science	
Home Economics		Theater	
Industrial & Technology Education		World Languages (specify)	

EFFORTS TO RECRUIT CERTIFIED PERSONNEL

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to www.cde.ca.gov for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL

Has your agency established a District Intern program? Yes No

If no, explain. _____

Does your agency participate in a Commission-approved college or university internship program? Yes No

If yes, how many interns do you expect to have this year? _____

If yes, list each college or university with which you participate in an internship program.

If no, explain why you do not participate in an internship program.



ANNUAL STATEMENT OF NEED 30-DAY SUBSTITUTE and DESIGNATED SUBJECTS CAREER TECHNICAL EDUCATION 30-DAY SUBSTITUTE TEACHING PERMITS

INSTRUCTIONS TO THE EMPLOYER

This statement of need must be filed at the school district office each school year when employing holders of Emergency 30-Day Substitute Permits. The employing agency will complete a single statement of need form (below) and retain the form at the school district office.

The form must be completed annually, indicating that either no credentialed person is available or that those available are not deemed qualified for substitute teaching and details of the circumstances that necessitate the use of emergency permit holders rather than fully credentialed teachers.

This statement of need form does not require listing specific employees or their positions. The form must be signed by the superintendent of the employing school district. It does not need to be co-signed by the county superintendent of schools.

A copy of the form does not need to be submitted to the county or the Commission with each Emergency 30-Day Substitute Teaching Permit application; however, the county superintendent of schools, whose responsibilities include areas such as district payroll or district substitute placement, may request a copy of the district's statement of need form to accurately fulfill these duties.

County superintendent of schools offices employing holders of the Emergency 30-Day Substitute Teaching Permit are also required to annually file, at their office, this completed statement of need form. The county superintendent of schools will sign the form.

The Commission does not require that the school board approve the statement of need. The individual school district may establish its own policy regarding this matter.

References: California Education Code, Sections 44225 and 44300 and California Code of Regulations, Title 5, Sections 80023, 80025 and 80026

This form must be signed by either:

The district superintendent of schools and filed at the school district office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a public school operated by a school district.

OR

The county superintendent of schools and filed at the county superintendent of schools' office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a county-operated school.

Certification and Authorized Signature

The district superintendent of schools or the county superintendent of schools has reviewed the information contained in this statement of need and certifies one the following:

Either a credentialed person is not available or one or more credentialed persons are available, but are not deemed qualified by the district or county, as applicable, to serve as a day-to-day substitute teacher.

OR

The situation or circumstances that necessitate the use of an emergency permit holder are as follows: (Attach additional sheets, if necessary.)

I hereby certify that all of the information contained in this statement of need is true and correct.

Signature of the District Superintendent *District* *Date*

Signature of the County Superintendent of Schools *County* *Date*

It is not necessary to submit this form to the Commission on Teacher Credentialing.



ENCLOSURE #13

ENCLOSURE SUMMARY

Consideration of Approval of the 2026-27 TCOE Declaration of Need & Annual Statement of Need for Sycamore Valley Academy

FROM: Shauna Dolin

DATE: 5/14/2026

BACKGROUND: An annual required general agenda approval item from the Tulare County Office of Education. This item allows Sycamore Valley Academy to receive support with long- and short-term substitutes, leave requests, and credentialing services at no cost to The Academies CMO.

SUPERINTENDENT'S RECOMMENDATION: Approve.

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on ___/___/___, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, _____.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

Name

Signature

Title

Fax Number

Telephone Number

Date

Mailing Address

E-Mail Address

- *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

Type of Emergency Permit

Estimated Number Needed

CLAD/English Learner Authorization (applicant already holds teaching credential)

Bilingual Authorization (applicant already holds teaching credential)

List target language(s) for bilingual authorization:

Resource Specialist

Teacher Librarian Services

Emergency Transitional Kindergarten (ETK)

LIMITED ASSIGNMENT PERMITS

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	
Single Subject	
Special Education	
TOTAL	

Authorizations for Single Subject Limited Assignment Permits

SUBJECT	ESTIMATED NUMBER NEEDED	SUBJECT	ESTIMATED NUMBER NEEDED
Agriculture		Mathematics	
Art		Music	
Business		Physical Education	
Dance		Science: Biological Sciences	
English		Science: Chemistry	
Foundational-Level Math		Science: Geoscience	
Foundational-Level Science		Science: Physics	
Health		Social Science	
Home Economics		Theater	
Industrial & Technology Education		World Languages (specify)	

EFFORTS TO RECRUIT CERTIFIED PERSONNEL

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to www.cde.ca.gov for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL

Has your agency established a District Intern program? Yes No

If no, explain. _____

Does your agency participate in a Commission-approved college or university internship program? Yes No

If yes, how many interns do you expect to have this year? _____

If yes, list each college or university with which you participate in an internship program.

If no, explain why you do not participate in an internship program.



ANNUAL STATEMENT OF NEED 30-DAY SUBSTITUTE and DESIGNATED SUBJECTS CAREER TECHNICAL EDUCATION 30-DAY SUBSTITUTE TEACHING PERMITS

INSTRUCTIONS TO THE EMPLOYER

This statement of need must be filed at the school district office each school year when employing holders of Emergency 30-Day Substitute Permits. The employing agency will complete a single statement of need form (below) and retain the form at the school district office.

The form must be completed annually, indicating that either no credentialed person is available or that those available are not deemed qualified for substitute teaching and details of the circumstances that necessitate the use of emergency permit holders rather than fully credentialed teachers.

This statement of need form does not require listing specific employees or their positions. The form must be signed by the superintendent of the employing school district. It does not need to be co-signed by the county superintendent of schools.

A copy of the form does not need to be submitted to the county or the Commission with each Emergency 30-Day Substitute Teaching Permit application; however, the county superintendent of schools, whose responsibilities include areas such as district payroll or district substitute placement, may request a copy of the district's statement of need form to accurately fulfill these duties.

County superintendent of schools offices employing holders of the Emergency 30-Day Substitute Teaching Permit are also required to annually file, at their office, this completed statement of need form. The county superintendent of schools will sign the form.

The Commission does not require that the school board approve the statement of need. The individual school district may establish its own policy regarding this matter.

References: California Education Code, Sections 44225 and 44300 and California Code of Regulations, Title 5, Sections 80023, 80025 and 80026

This form must be signed by either:

The district superintendent of schools and filed at the school district office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a public school operated by a school district.

OR

The county superintendent of schools and filed at the county superintendent of schools' office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a county-operated school.

Certification and Authorized Signature

The district superintendent of schools or the county superintendent of schools has reviewed the information contained in this statement of need and certifies one the following:

Either a credentialed person is not available or one or more credentialed persons are available, but are not deemed qualified by the district or county, as applicable, to serve as a day-to-day substitute teacher.

OR

The situation or circumstances that necessitate the use of an emergency permit holder are as follows:
(Attach additional sheets, if necessary.)

I hereby certify that all of the information contained in this statement of need is true and correct.

Signature of the District Superintendent *District* *Date*

Signature of the County Superintendent of Schools *County* *Date*

It is not necessary to submit this form to the Commission on Teacher Credentialing.



ENCLOSURE #14

ENCLOSURE SUMMARY

Consideration of Approval of Frontline Multi-year Renewal 2026-2029

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: We have been utilizing Frontline Education as our Absence Management and Time & Attendance platforms since the 2019-2020 school year with an annual renewal each school year. For the upcoming school year, Frontline has offered us a multi-year contract with locked in pricing over the next three years. Because this is a new type of contract that will total over a \$30,000 commitment over the next three years, we are presenting it to the board for approval.

SUPERINTENDENT'S RECOMMENDATION: Approve.



550 E. Swedesford Road, Suite 360, Wayne, PA 19087

04/28/2026

Customer:	Order Form Details:
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The Academies
PO BOX 1189
Visalia, California, 93279
United States

Renewal Specialist: Renee Clark
Sale Type: Renewal
Quote Currency: USD

Contact: Karin Aure

Title:

Phone:

Email: kaure@theacademiescharters.org

Pricing Overview	Amount
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Annual Recurring Fees	\$11,519.62
(Prorated Fees)	\$10,197.11

Annual Recurring Fees Itemized Description	Subscription Start	Subscription End	Amount
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Year 1			
Absence & Time Solution	8/18/2026	6/30/2027	\$10,197.11
Year 2			
Absence & Time Solution	7/01/2027	6/30/2028	\$11,519.62
Year 3			
Absence & Time Solution	7/01/2028	6/30/2029	\$11,750.01



550 E. Swedesford Road, Suite 360, Wayne, PA 19087

04/28/2026

Additional Order Form Information

Tax Information

Tax Exemption: Your order may be eligible for a tax exemption. Please ensure we have the most recent tax exemption form on file. Please send your completed exemption form to salestax@frontlineed.com. Otherwise, the appropriate tax will be applied at the time of invoicing.

PO Information

PO Status:

PO #:

Note: If a Purchase Order is required, Customer shall submit the PO to Frontline within ten (10) business days of signing this Order Form by emailing it to billing@frontlineed.com, otherwise a PO shall not be required for payment



550 E. Swedesford Road, Suite 360, Wayne, PA 19087

04/28/2026

Invoicing Schedule	Due Date	Amount
Year 1		\$10,197.11
Absence & Time Solution	9/17/2026	
Year 2		\$11,519.62
Absence & Time Solution	7/31/2027	
Year 3		\$11,750.01
Absence & Time Solution	7/31/2028	



550 E. Swedesford Road, Suite 360, Wayne, PA 19087

04/28/2026

MASTER SERVICES AGREEMENT

This Master Services Agreement is made effective as of the date of the signature below (the "Effective Date") by and between Frontline Technologies Group LLC dba Frontline Education, its subsidiaries and affiliates with an address at 550 E. Swedesford Road, Suite 360, Wayne, PA 19087 (collectively "Frontline"), and the client identified below ("Client"). Frontline and Client are sometimes referred to herein, individually, as a "Party" and, collectively, the "Parties."

By signing below, the Parties agree to be legally bound by the terms and conditions contained in the Frontline Master Services Agreement ("Master Services Agreement", which is available at <https://www.frontlineeducation.com/master-services-agreement/> and is incorporated herein by reference. The attached Order Form, exhibits (if any), Statements of Work and the referenced Master Services Agreement are collectively the "Agreement". To place orders subject to this Agreement, at least one Order Form (as defined in the Master Services Agreement) must be incorporated into this Agreement. Client may make future purchases of products and services from Frontline (and its subsidiaries and affiliates) under this Master Services Agreement by executing an Order Form and any future Order Forms without an attached or referenced Master Services Agreement will be deemed subject to this Master Services Agreement. This Agreement constitutes the complete and exclusive statement of the agreement between the Parties with respect to the Software and the Services set forth herein and any other software, products or other services provided by Frontline or any of its affiliates or predecessors prior to the Effective Date. For the avoidance of doubt, this Agreement supersedes any and all prior oral or written communications, proposals, RFPs, contracts, and agreements (including all prior license and similar agreements) and the Parties hereby terminate any such agreements. In the event of a conflict between the provisions of the Terms and Conditions and the provisions of any Statement of Work or any Order Form or any Order Form Terms and Conditions, the provisions of the Statement of Work or Order Form or Order Form Terms and Conditions, as applicable, shall govern, but only with respect to the services forth in the Statement of Work or that particular Order Form.

<p>Frontline Technologies Group LLC dba Frontline Education</p> <p>Signature: _____</p> <p>Name: _____</p> <p>Title: _____</p> <p>Address: <u>550 E. Swedesford Road, Suite 360</u> <u>Wayne, PA 19087</u></p> <p>Email: <u>billing@frontlineed.com</u></p> <p>Effective Date: _____</p>	<p>The Academies</p> <p>Signature: _____</p> <p>Name: <u>Karin Aure</u></p> <p>Title: _____</p> <p>Address: <u>PO BOX 1189</u> <u>Visalia, California 93279</u></p> <p>Email: <u>kaure@theacademiescharters.org</u></p>
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ENCLOSURE #15

ENCLOSURE SUMMARY

Consideration of approval for the Revised 2026-27 TACMO Academic Calendar DRAFT

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: In 2024-25, in preparation for the 2025-26 school year, the decision was made to move away from holding Trimester 2 conferences for all students to holding these conferences for limited students only, based on academic or other specific needs. Therefore, this is how Trimester 2 conferences were conducted this year.

While this is typical of other local schools, it is contrary to what is in our charter petitions, which state that conferences will be held two times per year. Additionally, the charter petitions highlight the schools' focus on a strong school-family connection, which two conferences annually support.

We conducted an optional teacher survey on this topic, and most support returning to conferences for all students for Trimester 2, as do our administrators.

The revisions to the Draft 2026-27 CMO Academic Calendar reinstate two full-day conference days for Trimester 2. In order to continue to meet instructional minutes and school day requirements, two full-day professional development days were changed to minimum days.

SUPERINTENDENT'S RECOMMENDATION: Approve



AUGUST 2026 (14)

MON	TUE	WED	THU	FRI
3	4	5 X	6 X	7 X
10 T	11 T	12 E	13	14
17	18	19 E	20	21
24	25	26 E	27	28
31				

SEPTEMBER 2026 (21)

MON	TUE	WED	THU	FRI
	1	2 E	3	4 ■
7 H	8	9 E	10	11
14	15	16 E	17	18
21	22	23 E	24	25
28	29	30 E		

OCTOBER 2026 (20)

MON	TUE	WED	THU	FRI
			1	2
5	6	7 E	8	9
12 H	13 X	14 E	15	16
19	20	21 E	22	23
26	27	28 E	29	30

NOVEMBER 2026 (13)

MON	TUE	WED	THU	FRI
2	3	4 E	5	6*
9	10	11 H	12	13
16	17	18 E	19 C	20 C
23 L	24 L	25 L	26 H	27 L
30				

DECEMBER 2026 (14)

MON	TUE	WED	THU	FRI
	1	2 E	3	4
7 ■	8	9 E	10	11
14	15	16 E	17	18 ■
21 L	22 L	23 L	24 L	25 H
28 L	29 L	30 L	31 L	

JANUARY 2027 (14)

MON	TUE	WED	THU	FRI
				1 H
4 L	5 L	6 L	7 L	8 L
11	12	13 E	14	15
18 H	19	20 E	21	22
25 ■	26	27 E	28	29

FEBRUARY 2027 (18)

MON	TUE	WED	THU	FRI
1	2	3 E	4	5
8	9	10 E	11	12 L
15 H	16	17 E	18	19
22 ■	23	24 E	25	26

MARCH 2027 (15)

MON	TUE	WED	THU	FRI
1	2	3 E	4	5*
8	9	10 E	11	12
15	16	17 E	18 C	19 C
22 L	23 L	24 L	25 L	26 L
29 L	30	31 E		

APRIL 2027 (22)

MON	TUE	WED	THU	FRI
			1	2
5	6	7 E	8	9
12	13	14 E	15	16
19	20	21 E	22	23 ■
26	27	28 E	29	30

MAY 2027 (20)

MON	TUE	WED	THU	FRI
3	4	5 E	6	7
10 ■	11	12 E	13	14
17	18	19 E	20	21
24	25	26 E	27	28
31 H				

JUNE 2027 (4)

MON	TUE	WED	THU	FRI
	1	2 E	3	4* ■
7	8	9	10	11
14	15	16	17	18 H
21	22	23	24	25
28	29	30		

No Student Attendance: School NOT in Session

Regular School Day: Grades TK-8

E Early Release Day: Grades TK-8 dismiss at 1:00 PM

■ Minimum Day: Grades TK-8 dismiss at 12:15 PM

*End of Trimester

C = Conference Day

H = National Holiday

L = Local Student
Non-Attendance Day

X = Staff Development

T = Teacher Work Day

CALCULATION OF INSTRUCTIONAL MINUTES FOR 2026-27 @ THE ACADEMIES CMO

TRANSITIONAL KINDERGARTEN AND KINDERGARTEN

Transitional Kindergarten and Kindergarten minute counts (only) include recess time, per Ed Code.

# MINIMUM DAYS: 8	Minutes per Minimum Day: 225
# EARLY RELEASE DAYS: 37	Minutes per Early Release Day: 270
# REGULAR DAYS: 130	Minutes per Regular Day: 300

TOTAL # DAYS: 175

Annual total # of minutes: 50,790

Required Annual #: 36,000

Difference: +14,790

GRADES 1-3

# MINIMUM DAYS: 8	Minutes per Minimum Day: 195
# EARLY RELEASE DAYS: 37	Minutes per Early Release Day: 230
# REGULAR DAYS: 130	Minutes per Regular Day: 360

TOTAL # DAYS: 175

Annual total # of minutes: 56,870

Required Annual #: 50,400

Difference: +6,470

GRADES 4-5

# MINIMUM DAYS: 8	Minutes per Minimum Day: 195
# EARLY RELEASE DAYS: 37	Minutes per Early Release Day: 230
# REGULAR DAYS: 130	Minutes per Regular Day: 360

TOTAL # DAYS: 175

Annual total # of minutes: 56,870

Required Annual #: 54,000

Difference: +2,870

GRADES 6-8

# MINIMUM DAYS: 8	Minutes per Minimum Day: 210
# EARLY RELEASE DAYS: 37	Minutes per Early Release Day: 255
# REGULAR DAYS: 130	Minutes per Regular Day: 380

TOTAL # DAYS: 175

Annual total # of minutes: 60,515

Required Annual #: 54,000

Difference: +6,515



ENCLOSURE #16

ENCLOSURE SUMMARY

Consideration of approval for the Talk N’ Roll Pediatric Speech Therapy Contracts for Speech and Language Pathology Service

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: This item was briefly introduced at our April Board meeting.

California schools are experiencing a critical shortage of speech and language pathologists (SLPs), leading to significant hiring difficulties. For the past 6 school years, our schools contracted with Presence Learning, which provided case management and direct services remotely through online services. In an effort to provide higher quality in-person services, Mrs. Morse (Director of Special Education) researched alternative options and has secured a contract with a local Speech and Language Pathologist who contracts with schools to administer assessments, provide case management, as well as train and supervise SLP Assistants for service implementation.

There are two contracts included. The first is for the SLP oversight services. The second is for the provision of SLP Assistant services. We asked for the contracts to be separated in the case that we could hire an SLP Assistant. However, our efforts to do so have not been successful. Therefore, we are bringing both contracts forward for approval.

The combined cost of the contracts is a considerable savings compared to the cost of services through Presence Learning, our previous contractor, and represents a higher quality in-person service.

SUPERINTENDENT’S RECOMMENDATION: Approve



Pediatric Speech Therapy

Proposal Speech Language Pathologist(s)
FALL 2026-SPRING 2027

Prepared For: Sycamore Valley/Blue Oak Academy

Submitted by:

Talk N' Roll Pediatric Speech Therapy Inc.
Jose Gonzalez, M.S., CCC-SLP/CEO/President
California Licensed Speech-Language Pathologist
ASHA Certificate of Clinical Competence (CCC-SLP)

Purpose & Service Philosophy

Talk N' Roll Pediatric Speech Therapy is committed to delivering high-quality, compliant, and student-centered speech-language services that support both academic access and functional communication across educational settings.

This proposal is intentionally structured to provide:

- Strong clinical oversight and compliance management through a licensed SLP
- A sustainable staffing model that promotes staff retention, service continuity, and reduced burnout

This dual-role structure ensures that students receive appropriate services while the district remains in full compliance with IDEA, California Education Code, and best practice standards.

Scope of Services

Speech-Language Pathologist (SLP)

Role: Case Management, Assessment, Compliance Oversight, and Supervision

The SLP will serve as the clinical lead across both Sycamore Valley and Blue Oak Academy, ensuring that all speech-language services are legally defensible, educationally relevant, and aligned with district expectations.

Services Include, but are not limited to:

- Case management for students receiving speech-language services
- Development, review, and revision of IEP goals and present levels
- Completion of initial, annual, and triennial evaluations, including report writing
- Participation in and facilitation of IEP meetings
- Ongoing progress monitoring and data-based decision making
- Collaboration with general education teachers, special education staff, and administration
- Parent communication and support as appropriate
- Oversight of service delivery to ensure alignment with IEP mandates
- Supervision of SLPA in accordance with California state guidelines, including:
 - Direct and indirect supervision requirements
 - Review of session notes and data collection
 - Ongoing training and support
 - Communication with SLPA within a week for newly established goals

Time Allocation:

- Up to **50 hours per month total** across both sites

This allocation is designed to support compliance, timely assessments, and consistent case management. Any additional time required beyond this allocation (e.g., excessive meetings, high influx of assessments, or programmatic needs) may require adjustment or additional billing.

Service Delivery Model

This model is designed to maximize efficiency while maintaining high standards of care:

- The **SLP focuses on high-level responsibilities** (compliance, assessments, IEPs, supervision)
- The **SLPA focuses on direct therapy minutes**, increasing student access to services
- Both roles work collaboratively to ensure consistency and quality

This approach allows for:

- Increased student contact time
- Reduced service gaps
- Stronger program oversight
- Improved compliance and documentation accuracy

Collaboration & Communication

Talk N' Roll Pediatric Speech Therapy prioritizes proactive and professional communication.

- The SLP will maintain regular communication with designated district contacts
- Concerns related to services, scheduling, or compliance should be communicated directly to the provider to allow for timely resolution
- The provider will make reasonable efforts to respond promptly and address concerns in a collaborative manner

Compliance & Professional Standards

All services will be delivered in accordance with:

- Individuals with Disabilities Education Act (IDEA)
- California Education Code
- ASHA (American Speech-Language-Hearing Association) standards
- District-specific policies and procedures

Documentation, timelines, and service delivery will be maintained to support legally defensible practices.

Annual Investment

Service	Annual Cost
SLP (Case Management, Assessments, Supervision)	\$65,000

*Additional hours beyond 50 per month will be billed at \$130 per hour, as pre-approved by the district.

Additional Terms & Considerations

- This proposal reflects services for the full academic school year
- Services are based on the outlined scope; significant increases in caseload, assessments, or required meeting participation may require contract adjustments
- Additional services outside of the defined scope (e.g., extended meetings, due process support, additional evaluations, summer services) may be billed separately
- Scheduling will be coordinated in collaboration with site administration to best meet student needs

- The provider will maintain appropriate licensure and liability coverage

Payment Terms

The total annual cost for SLP services is \$65,000 for the contracted service period.

Payments shall be made in equal monthly installments beginning August 1, 2026, with the final payment due June 1, 2027.

All payments shall be made payable to:

Talk N' Roll Pediatric Speech Therapy, Inc.

Payments shall be mailed to:

544 W. Mountain View Ave.

Woodlake, CA 93286

Payment Schedule (11 Payments)

- August 1, 2026
- September 1, 2026
- October 1, 2026
- November 1, 2026
- December 1, 2026
- January 1, 2027
- February 1, 2027
- March 1, 2027
- April 1, 2027
- May 1, 2027
- June 1, 2027

Invoices may be provided monthly upon request or according to district procedures.

Late Payment Fee

Payments not received within fifteen (15) calendar days of the due date may be subject to a late payment fee of 5% of the outstanding invoice balance.

Continued delayed payment may result in temporary suspension of services until the account is brought current.

Indemnification – SLP Case Management / Evaluation Services

Talk N' Roll Pediatric Speech Therapy, Inc. shall be responsible for services directly provided by its licensed Speech-Language Pathologist(s), including but not limited to evaluations, assessment interpretation, report writing, IEP participation, consultation, and related professional services performed within the scope of the agreement.

The District shall maintain responsibility for all district-operated programs, implementation of IEP services outside the contracted scope, student records, educational placement decisions, staffing decisions, and compliance obligations not directly performed by Talk N' Roll Pediatric Speech Therapy, Inc.

Each party agrees to indemnify and hold harmless the other party from any claims, liabilities, damages, or expenses arising from its own negligent acts, errors, omissions, or failure to fulfill responsibilities under this Agreement.

Commitment to Partnership

Talk N' Roll Pediatric Speech Therapy values long-term partnerships with school districts and is dedicated to supporting both student success and district compliance. Our goal is to provide a structured, reliable, and high-quality program that benefits students, staff, and the broader school community.



Pediatric Speech Therapy

Proposal Speech Language Assistant(s)
FALL 2026-SPRING 2027

Prepared For: Sycamore Valley/Blue Oak Academy

Submitted by:

Talk N' Roll Pediatric Speech Therapy Inc.
Jose Gonzalez, M.S., CCC-SLP/CEO/President
California Licensed Speech-Language Pathologist
ASHA Certificate of Clinical Competence (CCC-SLP)

Purpose & Service Philosophy

Talk N' Roll Pediatric Speech Therapy is committed to delivering high-quality, compliant, and student-centered speech-language services that support both academic access and functional communication across educational settings.

This proposal is intentionally structured to provide:

- Strong clinical oversight and compliance management through a licensed SLP and SLPA
- A sustainable staffing model that promotes staff retention, service continuity, and reduced burnout

This dual-role structure ensures that students receive appropriate services while the district remains in full compliance with IDEA, California Education Code, and best practice standards.

Direct Therapy Service Delivery Support

This proposal outlines Speech-Language Pathology Assistant (SLPA) services designed to support students through consistent, structured direct speech-language intervention across two school sites.

The SLPA will provide direct therapy services under the supervision and direction of a licensed Speech-Language Pathologist (SLP), in accordance with California state regulations, district procedures, and compliance requirements.

Scope of Services

The Speech-Language Pathology Assistant (SLPA) will provide direct speech-language intervention services to students identified for speech and language support through the Individualized Education Program (IEP) process.

Services may include, but are not limited to:

- Delivery of direct speech-language therapy services in individual and/or group settings
- Implementation of treatment plans, goals, accommodations, and strategies developed by the supervising SLP
- Support for students with articulation, phonology, expressive/receptive language, fluency, pragmatic language, AAC, and related communication needs

- Collection of therapy data and documentation of student performance and progress during sessions
- Completion of session notes and service logs in alignment with district timelines and compliance requirements
- Assistance with generalization of communication skills within classroom and educational settings
- Collaboration with teachers, support staff, and educational teams to support carryover of communication strategies
- Preparation and organization of therapy materials and activities necessary for service delivery
- Participation in scheduled supervision, training, and collaboration meetings with the supervising SLP

Services will be provided across two school sites based on district needs, student schedules, caseload distribution, and service delivery logistics.

The SLPA will not independently perform duties outside the legal scope of SLPA practice, including but not limited to conducting evaluations, independently interpreting assessment results, developing treatment plans, determining eligibility, or serving as the sole provider responsible for IEP decision-making.

Schedule & Service Distribution

Proposed Schedule

- 6 hours per day
- Monday through Friday

Service Locations

Services will be distributed across two school sites based on:

- Student service needs
- Caseload demands
- Scheduling logistics
- District priorities

A final service schedule will be developed collaboratively with district administration and site staff to maximize efficiency and minimize disruption to instructional time.

Supervision

All services provided by the SLPA will occur under the supervision of a licensed and credentialed Speech-Language Pathologist in accordance with:

- California state regulations
- ASHA guidelines
- District compliance expectations

The supervising SLP will provide:

- Ongoing oversight
- Treatment planning
- Consultation
- Required supervision hours
- Documentation review and support

Benefits to the District

This SLPA support model allows the district to:

- Increase consistency of student services
- Improve service coverage across multiple sites
- Reduce service gaps
- Support IEP compliance timelines
- Increase scheduling flexibility
- Provide structured and reliable intervention support for students

This model also supports supervising SLPs in focusing on:

- Assessments
- Case management
- IEP development
- Compliance responsibilities
- Consultation and collaboration

while ensuring continuity of direct student services.

Compliance & Professional Standards

All services will be delivered in accordance with:

- Individuals with Disabilities Education Act (IDEA)
- California Education Code
- ASHA (American Speech-Language-Hearing Association) standards
- District-specific policies and procedures

Documentation, timelines, and service delivery will be maintained to support legally defensible practices.

Annual Investment

Service	Annual Cost
SLPA (Direct Services)	\$51,000

*Additional hours beyond 30 per week will be billed at \$130 per hour, as pre-approved by the district.

Additional Terms & Considerations

- This proposal reflects services for the full academic school year
- Services are based on the outlined scope; significant increases in caseload, assessments, or required meeting participation may require contract adjustments
- Additional services outside of the defined scope (e.g., extended meetings, due process support, additional evaluations, summer services) may be billed separately
- Scheduling will be coordinated in collaboration with site administration to best meet student needs
- The provider will maintain appropriate licensure and liability coverage

Payment Terms

The total annual cost for SLPA direct therapy services is \$51,000 for the contracted service period.

Payments shall be made in equal monthly installments beginning August 1, 2026, with the final payment due June 1, 2027.

All payments shall be made payable to:

Talk N' Roll Pediatric Speech Therapy, Inc.

Payments shall be mailed to:

544 W. Mountain View Ave.

Woodlake, CA 93286

Payment Schedule (11 Payments)

- August 1, 2026
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- March 1, 2027
- April 1, 2027
- May 1, 2027
- June 1, 2027

Invoices may be provided monthly upon request or according to district procedures.

Late Payment Fee

Payments not received within fifteen (15) calendar days of the due date may be subject to a late payment fee of 5% of the outstanding invoice balance.

Continued delayed payment may result in temporary suspension of services until the account is brought current.

Indemnification – SLPA Direct Therapy Services

Talk N' Roll Pediatric Speech Therapy, Inc. shall be responsible for direct speech-language treatment services provided by its assigned Speech-Language Pathology Assistant (SLPA) under the supervision of a licensed Speech-Language Pathologist, including implementation of therapy plans, service delivery, documentation, and treatment-related responsibilities within the legal scope of SLPA practice.

The District shall maintain responsibility for district-operated programs, student scheduling, classroom implementation, educational placement decisions, IEP development, compensatory education determinations, and compliance obligations outside the direct treatment services outlined in this Agreement.

Each party agrees to indemnify and hold harmless the other party from any claims, liabilities, damages, or expenses arising from its own negligent acts, errors, omissions, or failure to fulfill responsibilities under this Agreement.

Commitment to Partnership

Talk N' Roll Pediatric Speech Therapy values long-term partnerships with school districts and is dedicated to supporting both student success and district compliance. Our goal is to provide a structured, reliable, and high-quality program that benefits students, staff, and the broader school community.



ENCLOSURE #17

ENCLOSURE SUMMARY

BP 26-003 Cell Phones, Smartphones, Pagers, & Other Electronic Signaling Devices
DRAFT

FROM: Karin Aure

DATE: 5/19/2026

BACKGROUND: At our March meeting we reviewed a previously drafted Board policy on limiting student use of mobile phones at school. General consensus supported the broad Board policy with discussion centered on implementation, consistency, and communication of the site protocols and procedures supporting the policy. In this update, there is an explanation of current practices, summary of teacher and parent feedback, and review of next steps for refinement and effective implementation. This is a first-read. All school districts must adopt a policy limiting or prohibiting the use of smartphones during the school day by July 1, 2026.

Family and Teacher Input on Student Smartphone Policies and Protocols

Data Collection, Analysis, and Next Steps

Data Collection

Teacher Survey Results

- Purpose: To gather feedback regarding current practices - what's working and what could be improved. Feedback will be used to enhance current protocols, strengthen communication, and ensure consistency with new Board policy. This was an optional survey.
- Respondents: Teachers in grades 4-8. 12 responses.
- Current Practices:
 - **BOA** - No formal protocol in Gr 4/5. Gr 6-8 students turn in their phone at the start of their first core class (typically the 2nd period of the day). The names of students who did not turn in a phone are submitted to the office for follow-up by the Vice Principal. When there is a violation, parents are reminded of the school protocol. At the end of the day, students return to their homeroom to pick up their phone. Students do not have access to their phone most of the day.
 - **SVA** - No formal protocol in Gr 4/5. Grade 6-8 students may turn in their phone upon entering the classroom, or they may keep their phone in their backpack (silent and unseen). Phones that are turned in are stored in the classroom phone box. Boxes are not locked. Students who turn in their phone, pick it up as they exit. Students are never in a class without access to their phone.
- Results:
 - 72% of respondents describe overall student smartphone use on campus as “not a problem”.
 - 72% of respondents agree that current approaches to eliminating the use of smartphones among students is “effective”.
 - Strengths of current practices:
 - Majority of students turn in their smartphones. ✓ ✓
 - Overall, students who do not turn in their phones, keep them stored away and refrain from using them. ✓ ✓
 - Phones that are in backpacks stay outside and are therefore out of reach.
 - The protocols have decreased students time in the bathroom.
 - Students ask if they need to use their phone to communicate with a parent.
 - Students are respectful.
 - Routine/protocol is clear and understood by staff and students. ✓
 - Record to see if students are turning in their phones daily.
 - Phone boxes set the precedent that phones are not allowed in the classroom.
 - Challenges of current practices:
 - Some students don't turn in their phones.
 - While phones in class are not a problem, they are an issue at break.
 - Students who are carrying their phones around with them can easily pull them out during class or when they go to the restroom. ✓
 - Staff don't know which students have phones. The system runs by the honor system.
 - Students turn in their phones to some teachers, but not all teachers.

- Phone boxes aren't sturdy.
- Substitute teachers don't know the cell phone protocol and some have allowed student use of phones. ✓
- Once phones are returned at the end of the day, students use them immediately. At dismissal, there may be a circle of friends sharing something over a phone. ✓✓
- Redistribution is chaotic and takes a lot of time. Phones should be centrally collected and redistributed.
- Suggestions:
 - Administration to review the cell phone policy with students not just once a year, but twice.
 - Student phones should be turned in or kept in backpacks. Students should not have phones in their pockets.
 - Students do not need their phones during breaks.
 - Have students turn in their phones in the morning and pick them up in the afternoon at the gate or from their homeroom.
 - There needs to be consistency among teachers.
 - Share communication protocols in an emergency with students.

Parent Forum Results

- Purpose: To share requirements of the cell phone policy legislation, research on cell phones in schools, and gather parent input on cell phone limitations at school.
- Attendees: Parents. 4 participants.
- Results:
 - Strongly support limited-to-no access to phones for students at school
 - A cell phone ban at school supports parents at home, including those who do not provide their child with a cell phone and those who put limitations on use outside of school
 - Provide clear and timely communication to families regarding student cell phone policies and procedures at school
 - Inform parents how communication with/from their child can take place during the school day
 - Share with parents the reasons behind student cell phone policies and procedures
 - Share with students the reasons behind student cell phone policies and procedures
 - Address what the school will do in the case of an emergency, including a lockdown (e.g., communication to families, access and role of emergency services, protocols to keep students safe)
 - Strengthen digital literacy skills and competencies among students
 - Educate students on the importance of connectedness and how limiting phone use can help (not just for Middle School students)
 - Plan activities that encourage and strengthen connectedness among students

Analysis

Teachers and parents support restricted access to cell phones for students at school. Of those polled, both groups support an entire ban on cell phones during the school day. Teachers rate current practices as effective and emphasize collection and distribution protocols that improve ease and limit disruption. They also stress the importance of consistent implementation across teachers, classrooms, and substitute staff. Parents emphasize the importance of communication regarding protocols - and their purpose - to both students and families. They

also spotlighted the importance of digital literacy, student connectedness, and clear communication regarding emergency procedures.

Next Steps

Create site-level protocols and procedures that support the newly adopted Board policy and reflect the input of teachers and parents. This process will be led by the Superintendent and Vice Principals, working closely with Principals and teachers for review and revision, in time to be rolled out at The Academies annual Pre-Service training with new and returning staff. The framework will include, but not limited to:

- Collection and Re-distribution - How cell phones will be collected and redistributed, where they will be stored, and to what extent cell phones should be collected.
- Consequences for Misuse - Additional detail regarding consequences for misuse to ensure consistent and equitable enforcement across classrooms, locations, and times of day.
- Protocols in an Emergency - What is expected of teachers and students during an emergency and how communication will take place.
- Training for Staff - When and how staff will be trained on the protocol, including what to do in response to cell phones that are *not* turned off, silent, or stored out of sight, prior to the start of school.
- Communication to Families - What will be shared with families in advance of the start of school, as part of the Handbook, and intermittently throughout the year.
- Communication to Students - How the protocols will be shared with students, by whom, how often, and why the protocols are in place.
- Student Education - Lessons/objectives for student education in digital literacy and cell phone practices, including opportunities for building connectedness and belonging.

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THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

CELL PHONES, SMARTPHONES, PAGERS, & OTHER ELECTRONIC SIGNALING DEVICES POLICY

The Academies Charter Management Organization (“TACMO” or the “Charter School”) Board of Directors recognizes the potential for cell phones, smartphones, pagers, and electronic signaling devices (hereinafter collectively referred to as “private devices”) to disrupt the learning environment of the Charter School, and adopts this Policy to permit students to possess, but not use private devices while on school grounds, at school-sponsored activities, or under the supervision of Charter School employees, except as otherwise provided in this Policy. Students who possess any private devices must always keep them turned off and out of view while on school grounds or at school-sponsored activities and functions. Private devices may not access the school network.

Charter School teachers, administrators, and staff will confiscate any private devices used by a student in violation of this Policy.

All students are required to adhere to the following guidelines regarding private devices:

Private devices may be used:

- Off campus before or after school.
- Before or after any Charter School sponsored activity occurring before or after the regular school day.
- To access the time.
- In the case of an emergency, or in response to a perceived threat of danger.
- When a teacher or administrator of the Charter School grants permission to a student to possess or use a private device, subject to any reasonable limitation imposed by that teacher or administrator.
- When a licensed physician and surgeon determines that the possession or use of a private device is necessary for the health or well-being of the student.
- When the possession or use of a private device is required in a student’s individualized education program (“IEP”).

Private devices shall be turned off and shall not be used:

- During instructional classroom time, including assemblies, and any other school activity, which takes place during the regularly scheduled school day on or off campus.
- During break periods, between class periods, or during lunch in restrooms, playground, cafeteria, school offices and all other areas on campus
- During events sponsored by the Charter School held before or after regular school hours.
- On field trips or excursions sponsored by the Charter School.

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Possession of private devices is a privilege, which may be forfeited by any student who fails to abide by the terms of this Policy. All Charter School employees shall remove any private device from the possession of a student found to be violating this Policy. If a private device is heard ringing, beeping, or buzzing from inside a jacket, purse, backpack, or other similar article, whether within the immediate presence of the student or not, a Charter School employee may proceed with the following:

1st Offense- issue a warning

2nd Offense- confiscate the private device for the student to pick up at the end of the regular school day or at the conclusion of a Charter School sponsored activity

3rd Offense- confiscate the private device for parents/guardians to pick up at the end of the regular school day or at the conclusion of a Charter School sponsored activity.

In addition to this Policy, all other applicable Charter School student discipline policies and rules shall apply to any student who fails to comply with the requirements of this Policy.

Students who possess any private device(s) shall assume sole responsibility for the maintenance and care of any such private device(s) in accordance with this Policy. At no time shall the Charter School be responsible for preventing theft, loss or damage to any private devices brought onto campus or at Charter School sponsored activities.

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This policy was formally adopted at a meeting of The Academies Charter Management Organization Board of Directors on June 16, 2026.

Alex Tietjen, Board Secretary