High Desert "Partnership in Academic Excellence" Foundation, Inc. dba

LEWIS CENTER FOR EDUCATIONAL RESEARCH

17500 Mana Road, Apple Valley, CA 92307 (760) 946-5414 (760) 946-9193 fax

Agenda for Regular Meeting of the Lewis Center for Educational Research Board
September 16, 2024 - Public Meeting – 4:30 p.m.

Meeting at 17500 Mana Rd., Apple Valley, CA, Multipurpose Room
Additional Locations: 230 S. Waterman Ave., San Bernardino, CA, Multipurpose Room; 5028 Workman Mill Road, Whittier, CA, 1936 De Anza Drive, Colton, CA, 4110 Berryman Avenue, Los Angeles, CA

To participate by teleconference, register for the meeting at this link:
https://attendee.gotowebinar.com/rt/5511069376677256799
Dial in using your phone: +1 (562) 247-8422 Passcode: 368-951-363

1. **CALL TO ORDER AND PLEDGE OF ALLEGIENCE**: Chairman Caldwell

2. **ROLL CALL**: Chairman Caldwell

3. **PUBLIC COMMENTS**: Members of the general public may address the Board during Public Comments or as items appearing on the agenda are considered. A time limit of three (3) minutes and/or 250 words per person and 15 minutes per topic shall be observed. If more than one person wishes to speak on the same topic, subsequent speakers should limit their remarks to new information only. If you are attending virtually and wish to send in a public comment to be read at this meeting, please complete a "Registration Card to Address the Board" (located on the website) and email it to the Secretary at lcerboard@lcer.org. Your comment will be read at the meeting during public comments or as the agenda item is heard.

4. **SPECIAL PRESENTATIONS**:
   .01 Retirement Presentation to Steve Orsinelli – 26 Years – Foundation/LCER Board
   .02 LCER Ambassadors Student Update
   .03 NSLA Principal Update – Erika Agosto
   .04 AAE Principal Update – Chet Richards
   .05 Presentation of NSLA and AAE State Test Results and Current Assessment Data Using Parsec – Heather Muir

5. **CONSENT AGENDA**:
   .01 Approve Minutes of August 19, 2024 Regular Meeting – Pg 39
   .02 Approve AAE SFJORTC Field Trip to USS Iowa January 25 – 26, 2025 – Pg 42
   .03 Approve AAE SFJROTC Leadership Camp in Fawnskin, CA March 24 – 28, 2025 – Pg 45
   .04 Approve Revised LCER Strategic Plan 2024-2029 – Pg 48

6. **DISCUSSION/ACTION ITEMS**
   .01 Lewis Center Foundation Board Update – Marisol Sanchez
   - Annual Gala - September 28, 2024

7. **INFORMATION INCLUDED IN PACKET**: *(Board members may ask questions on items for clarification.)*
   .01 President/CEO Report – Pg 96
   .02 Grant Tracking Report – Pg 105
   .03 LCER Financial Reports – Pg 106
   - Checks Over $10K
   - Budget Comparisons
   - Lewis Center Foundation Financial Reports
   - Quarterly Financial Report (Phan 6/30)

.04 LCER Board Attendance Log – Pg 140
.05 LCER Board/Lewis Center Foundation Give and Get – Pg 141

8. BOARD/STAFF COMMENTS:
.01 Ask a question for clarification
.02 Make a brief announcement or a brief report on his or her own activities
.03 Future agenda items

9. CLOSED SESSION:
.01 Pupil Personnel Administrative Hearing Panel Recommendation on NSLA Stipulated Expulsion Case #33539

10. ADJOURNMENT: Chairman Caldwell

Pursuant to the provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting is asked to advise the agency at least 72 hours before the meeting by calling (760) 946-5414 x201. Any written materials relating to agenda items to be discussed in open session are available for public inspection prior to the meeting at 17500 Mana Rd., Apple Valley, CA.

Norton Science and Language Academy's

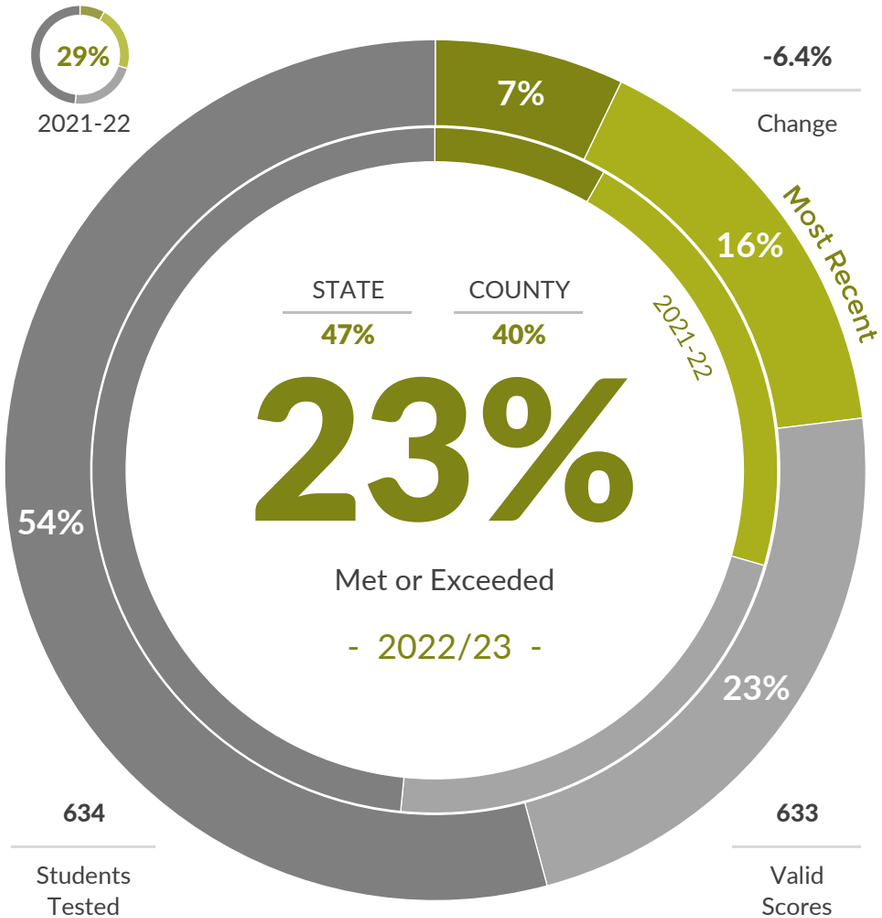
STATE TEST

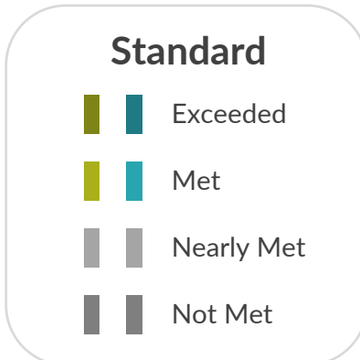
English & Language Arts and Math Results for 2022-23

Data Source: CAASPP Research Data Files
Designed by Parsec Education, Inc.

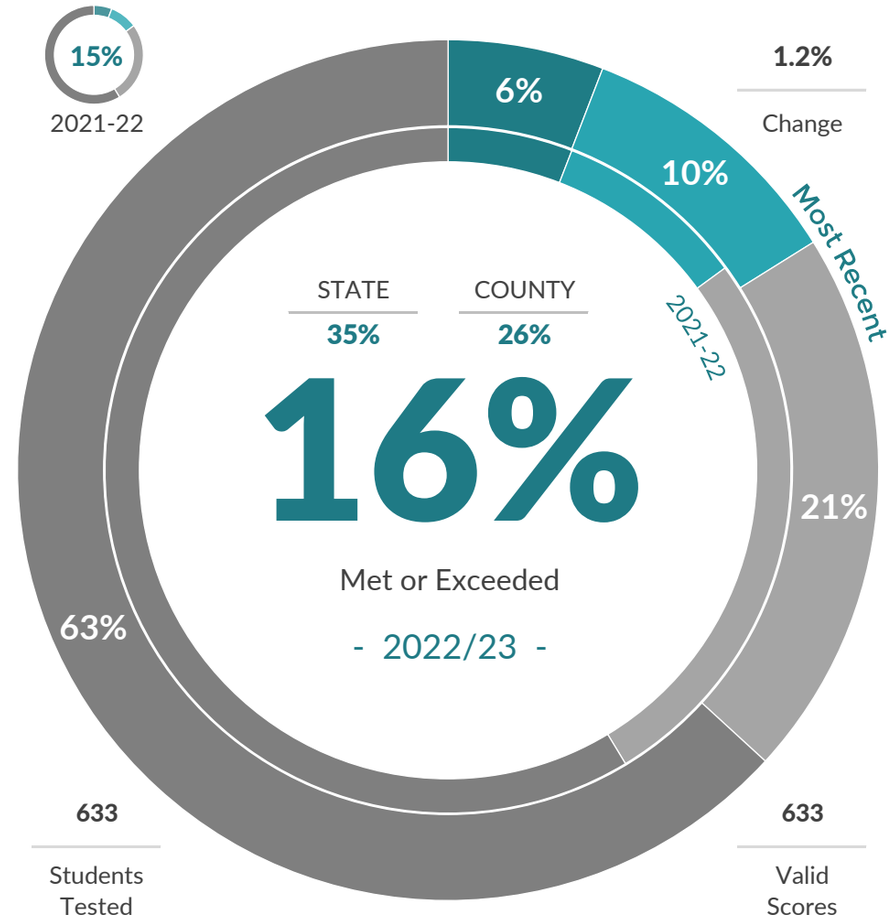
OVERALL

ENGLISH & LANGUAGE ARTS





MATHEMATICS



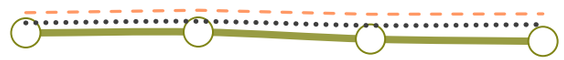
School Year	Total Enrollment	Unduplicated Count		Low Income		English Learner		Foster Youth		Homeless		Migrant	
2021/22	**1,041**	**824**	79%	**757**	73%	**327**	31%	**5**	0.5%	**21**	2.0%	**0**	0.0%
2022/23	**1,105**	**907**	82%	**855**	77%	**351**	32%	**1**	0.1%	**27**	2.4%	**0**	0.0%
	64	83	2.9%	98	4.7%	24	0.4%	-4	-0.4%	6	0.4%	0	0.0%

MULTI-YEAR TREND

ENGLISH & LANGUAGE ARTS

Statewide Average
Countywide Average

4-YEAR TREND LINE

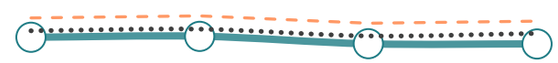


	17-18	18-19	21-22	22-23	Avg. Multi-Year Change
Exceeded	11%	12%	8%	7%	**-1.4%**
Met	21%	25%	21%	16%	**-1.8%**
Nearly Met	27%	27%	22%	23%	**-1.5%**
Not Met	40%	36%	48%	54%	**4.6%**

MATHEMATICS

Statewide Average
Countywide Average

4-YEAR TREND LINE

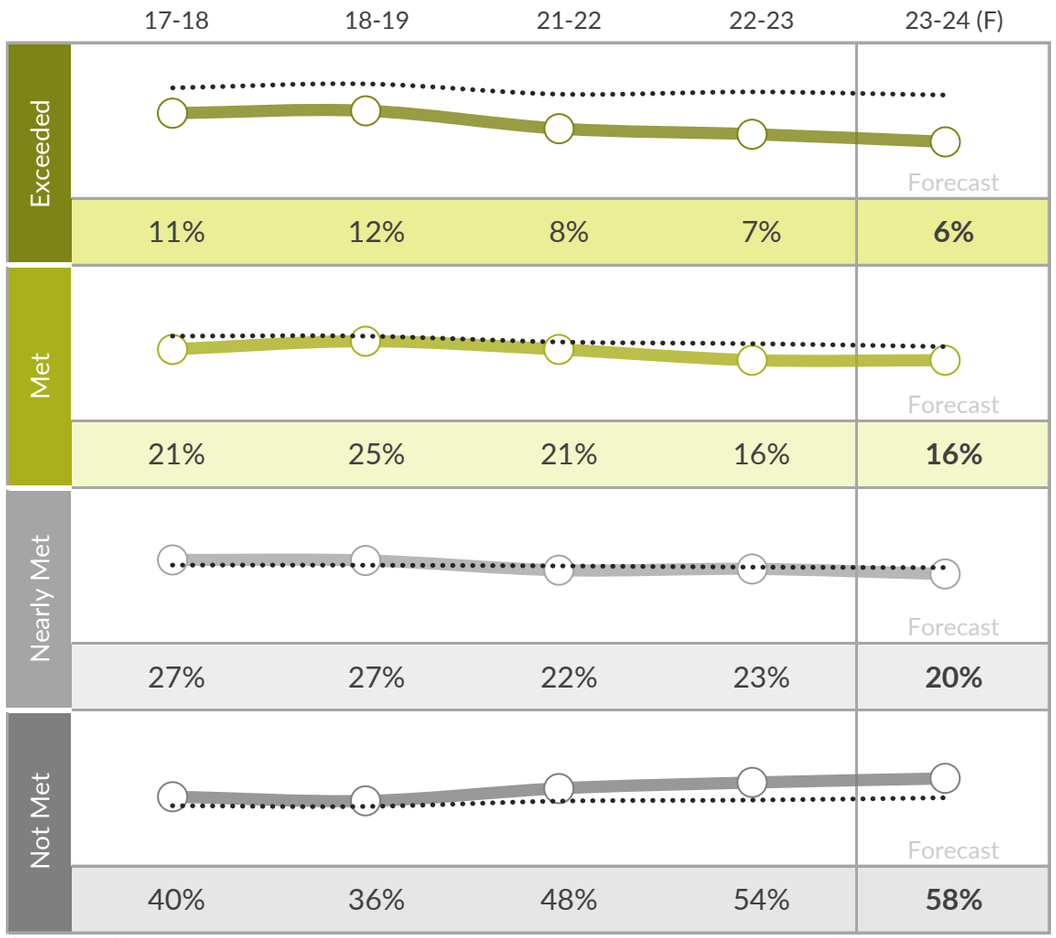


	17-18	18-19	21-22	22-23	Avg. Multi-Year Change
Exceeded	9%	10%	6%	6%	**-1.1%**
Met	19%	21%	9%	10%	**-3.1%**
Nearly Met	31%	31%	26%	21%	**-3.3%**
Not Met	41%	38%	59%	63%	**7.5%**

FORECAST (F)

ENGLISH & LANGUAGE ARTS

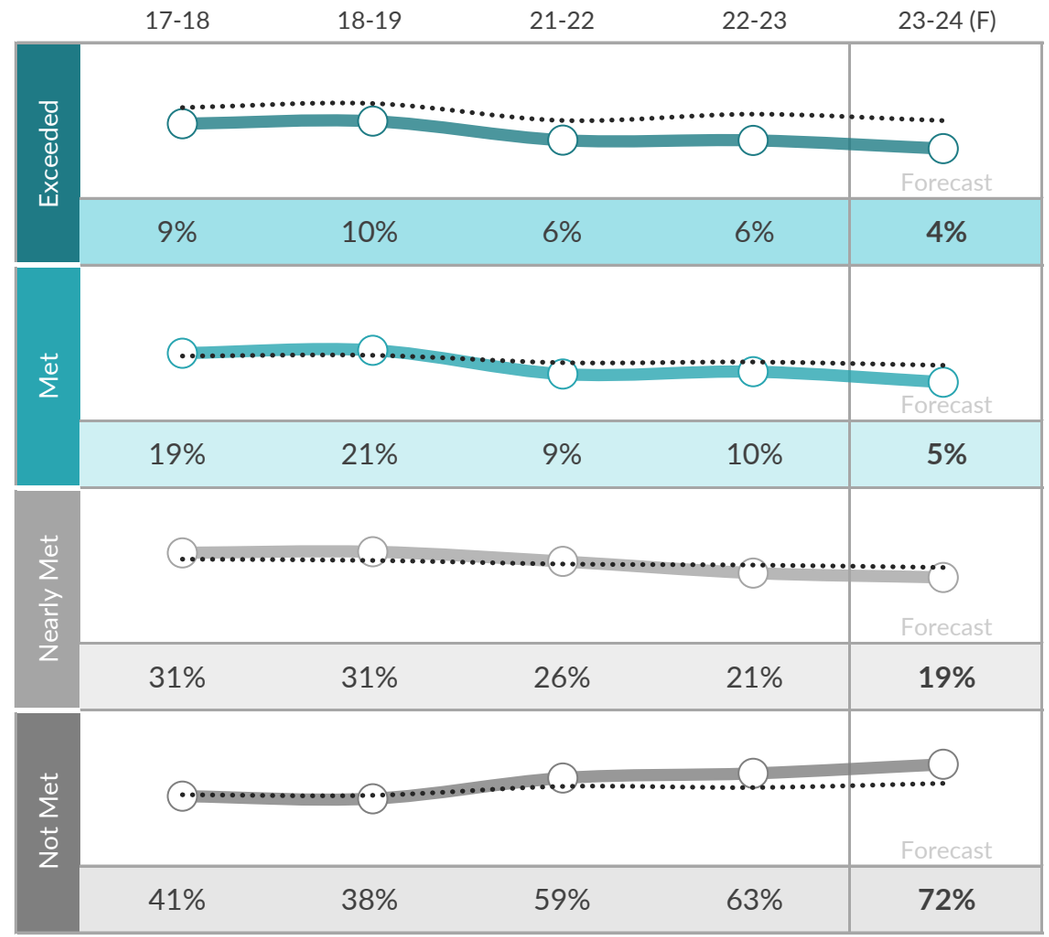
5-YEAR FORECAST LINE ····· Countywide Average



*Future value(s) are predicted based on existing 4-year historical values by using the linear forecast algorithm. The percentages in the last column may not add up to an exact 100%. Past performance is no guarantee of future results.

MATHEMATICS

5-YEAR FORECAST LINE ····· Countywide Average



GRADE LEVEL

ENGLISH & LANGUAGE ARTS

Not Met | Nearly Met | Met | Exceeded | Statewide | Countywide

BY GRADE LEVEL

Grade	22-23 Achievement Results	Scores
3rd	58% 17% 17% 8%	100
4th	67% 12% 12% 10%	103
5th	37% 31% 24% 8%	84
6th	57% 23% 12% 8%	119
7th	57% 22% 17%	117
8th	45% 33% 16%	110
11th		0

% MET + EXCEEDED

Grade	17-18	18-19	21-22	22-23
3rd	33%	27%	26%	25%
4th	30%	26%	22%	21%
5th	34%	46%	36%	32%
6th	32%	44%	23%	20%
7th	25%	50%	32%	21%
8th	41%	40%	41%	22%
11th				

MATHEMATICS

Not Met | Nearly Met | Met | Exceeded | Statewide | Countywide

BY GRADE LEVEL

Grade	22-23 Achievement Results	Scores
3rd	48% 21% 21% 10%	100
4th	55% 25% 14%	103
5th	57% 26% 11%	84
6th	64% 23% 8% 6%	119
7th	74% 18%	117
8th	77% 13%	110
11th		0

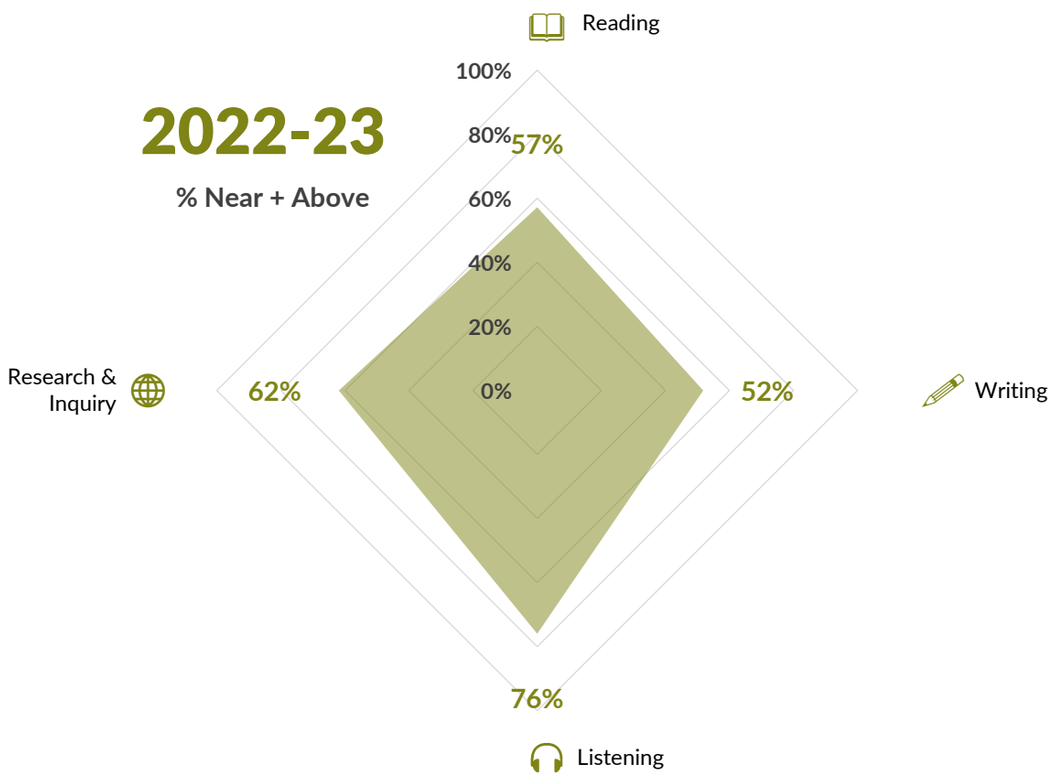
% MET + EXCEEDED

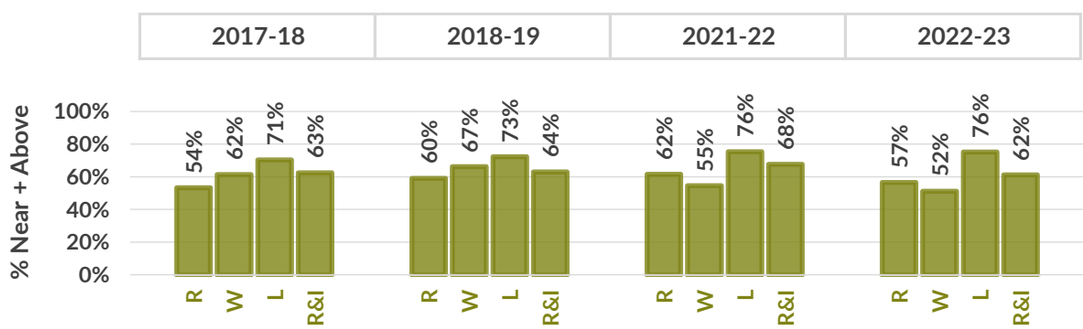
Grade	17-18	18-19	21-22	22-23
3rd	42%	39%	26%	31%
4th	33%	27%	13%	19%
5th	17%	37%	12%	17%
6th	24%	24%	9%	13%
7th	23%	34%	16%	9%
8th	23%	13%	12%	10%
11th				

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

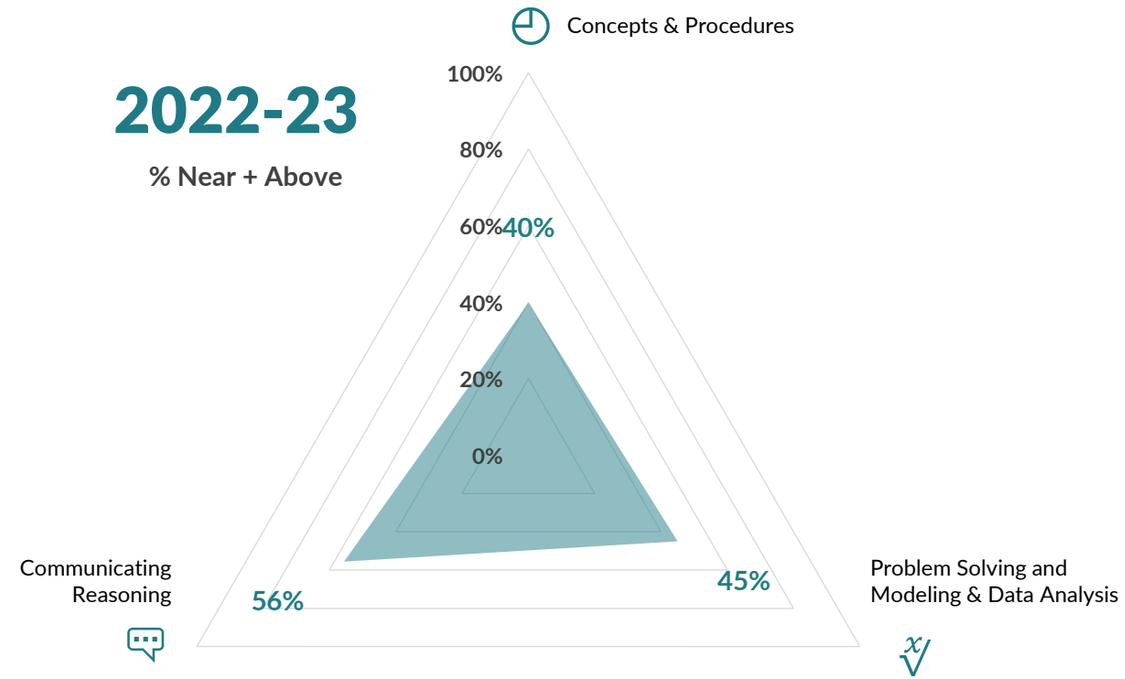
CLAIM AREA PERFORMANCE IN 2022-23

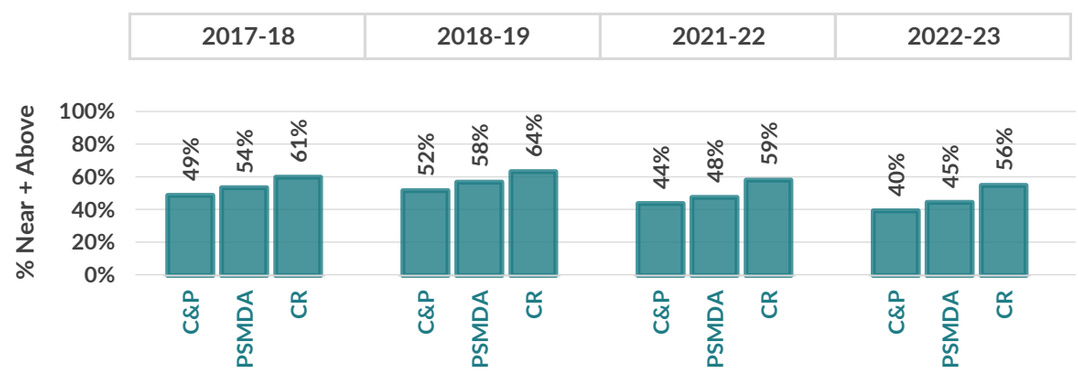
ENGLISH & LANGUAGE ARTS





MATHEMATICS





Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

CLAIM AREA PERFORMANCE IN 2022-23

ENGLISH & LANGUAGE ARTS

ELA Performance Levels: Below Near Above

Claim Area	3rd	4th	5th	6th	7th	8th	11th	Overall
Reading	6% / 53% / 41%	11% / 46% / 44%	11% / 68% / 21%	10% / 34% / 56%	8% / 50% / 43%	5% / 49% / 45%		8% / 49% / 43%
Writing	6% / 45% / 49%	3% / 37% / 60%	7% / 65% / 27%	7% / 36% / 57%	7% / 40% / 53%	10% / 53% / 37%		7% / 45% / 48%
Listening	8% / 74% / 18%	1% / 70% / 29%	7% / 68% / 25%	7% / 67% / 26%	7% / 72% / 21%	6% / 69% / 25%		6% / 70% / 24%
Research & Inquiry	2% / 50% / 48%	2% / 56% / 42%	6% / 63% / 31%	8% / 55% / 38%	5% / 57% / 38%	8% / 60% / 32%		5% / 57% / 38%

MATHEMATICS

Math Performance Levels: Below Near Above

Claim Area	3rd	4th	5th	6th	7th	8th	11th	Overall
Concepts & Procedures	14% / 41% / 45%	8% / 34% / 58%	4% / 48% / 49%	5% / 32% / 63%	5% / 24% / 71%	2% / 28% / 70%		6% / 34% / 60%
Problem Solving and Modeling & Data Analysis	10% / 40% / 50%	4% / 39% / 57%	7% / 45% / 48%	5% / 35% / 60%	4% / 36% / 60%	5% / 43% / 53%		6% / 39% / 55%
Communicating Reasoning	13% / 54% / 33%	8% / 49% / 44%	6% / 61% / 33%	4% / 52% / 44%	1% / 43% / 56%	5% / 43% / 52%		6% / 50% / 44%

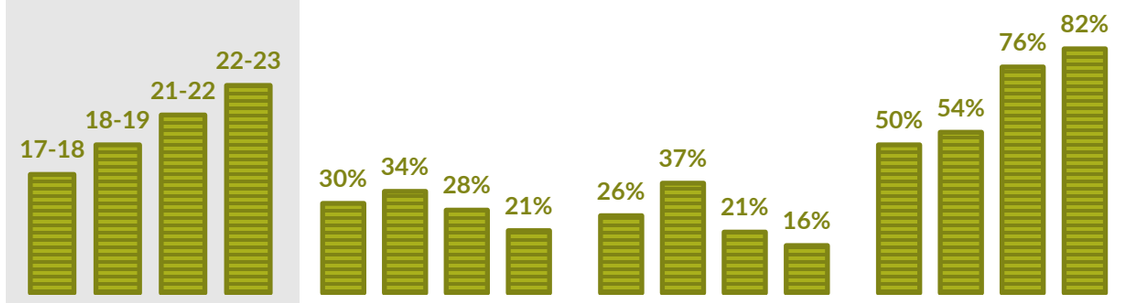
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

ETHNICITY

ENGLISH & LANGUAGE ARTS

BY ETHNICITY

% Met + Exceeded Across 4-Years



TEST YEAR LEGEND	Hispanic/Latino (580)	Black/African American (25)	White (17)

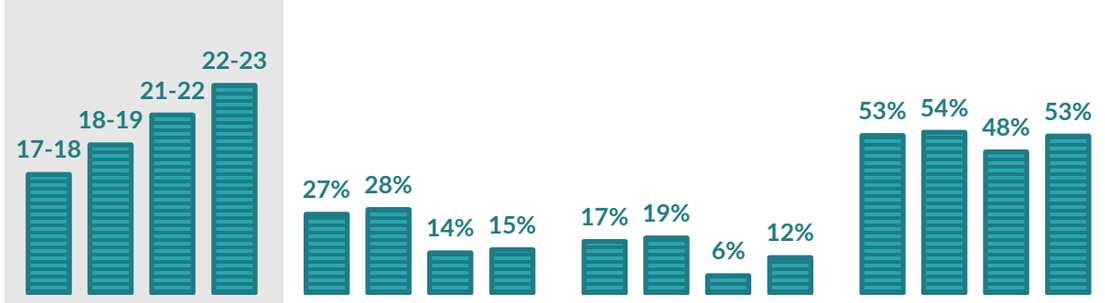
Asian (6)

(#) = number of students with scores

MATHEMATICS

BY ETHNICITY

% Met + Exceeded Across 4-Years



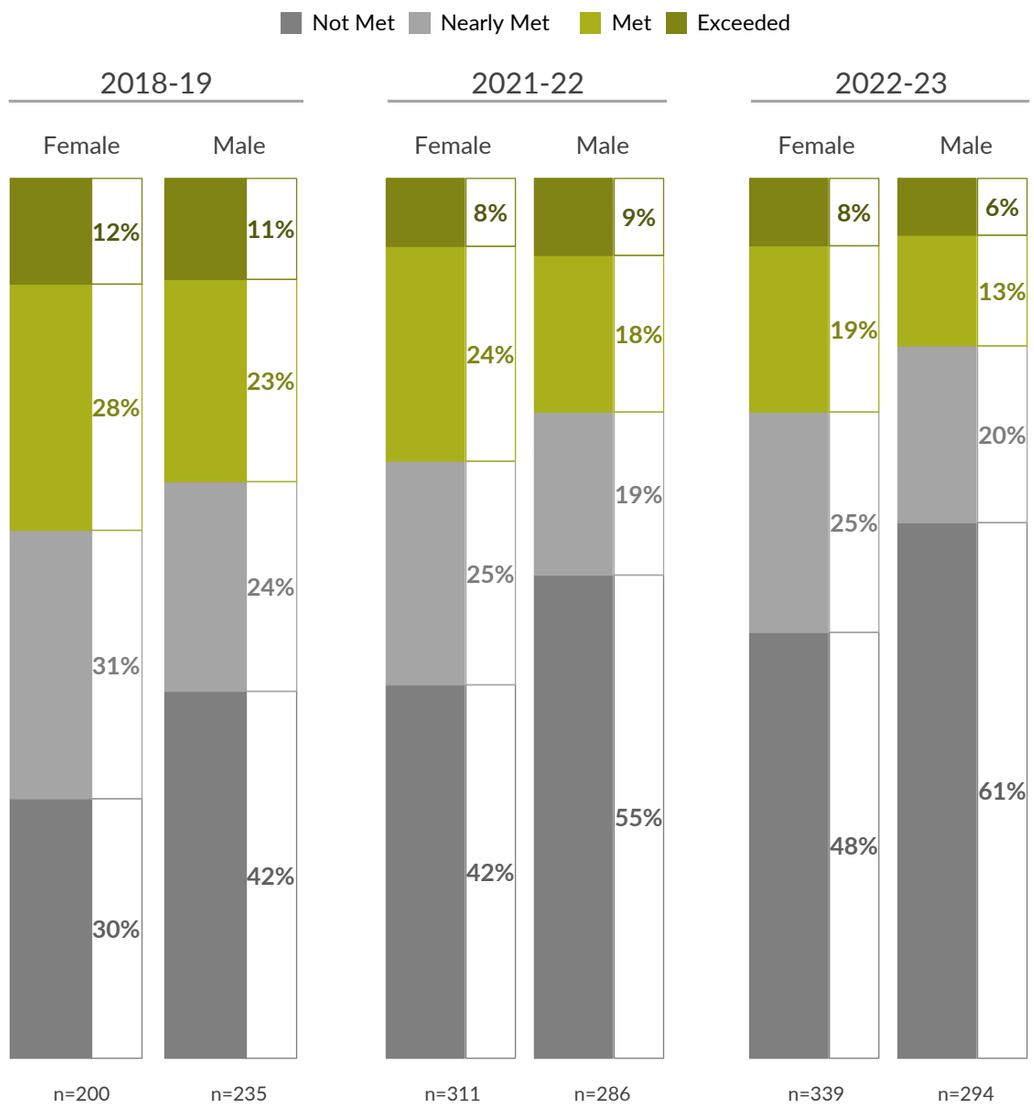
TEST YEAR LEGEND	Hispanic/Latino (580)	Black/African American (25)	White (17)

Asian (6)

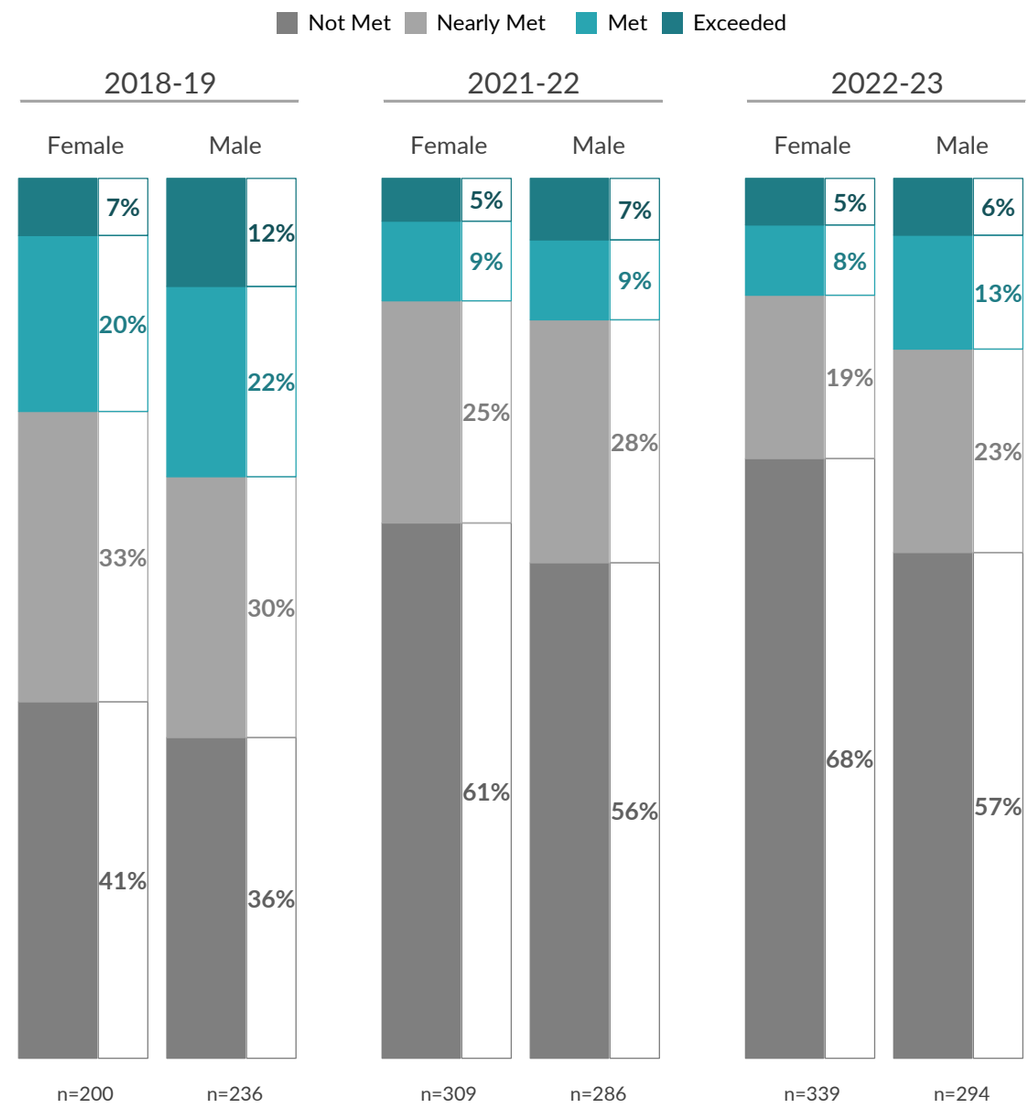
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

GENDER

ENGLISH & LANGUAGE ARTS



MATHEMATICS



*n = number of students with scores

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

COHORT

ENGLISH & LANGUAGE ARTS

COHORT ANALYSIS

% Met + Exceeded

Grade	17-18	18-19	21-22	22-23	Avg. Change
4th			26% (3rd)	21% (4th)	-5.0% ▼
5th		-	22% (4th)	32% (5th)	9.8% ▲
6th	-	-	36% (5th)	20% (6th)	-15.4% ▼
7th	-	27% (3rd)	23% (6th)	21% (7th)	-3.5% ▼
8th	33% (3rd)	26% (4th)	32% (7th)	22% (8th)	-3.7% ▼

MATHEMATICS

COHORT ANALYSIS

% Met + Exceeded

Grade	17-18	18-19	21-22	22-23	Avg. Change
4th			26% (3rd)	19% (4th)	-6.9% ▼
5th		-	13% (4th)	17% (5th)	3.9% ▲
6th	-	-	12% (5th)	13% (6th)	1.2% ▲
7th	-	39% (3rd)	9% (6th)	9% (7th)	-15.3% ▼
8th	42% (3rd)	27% (4th)	16% (7th)	10% (8th)	-10.8% ▼

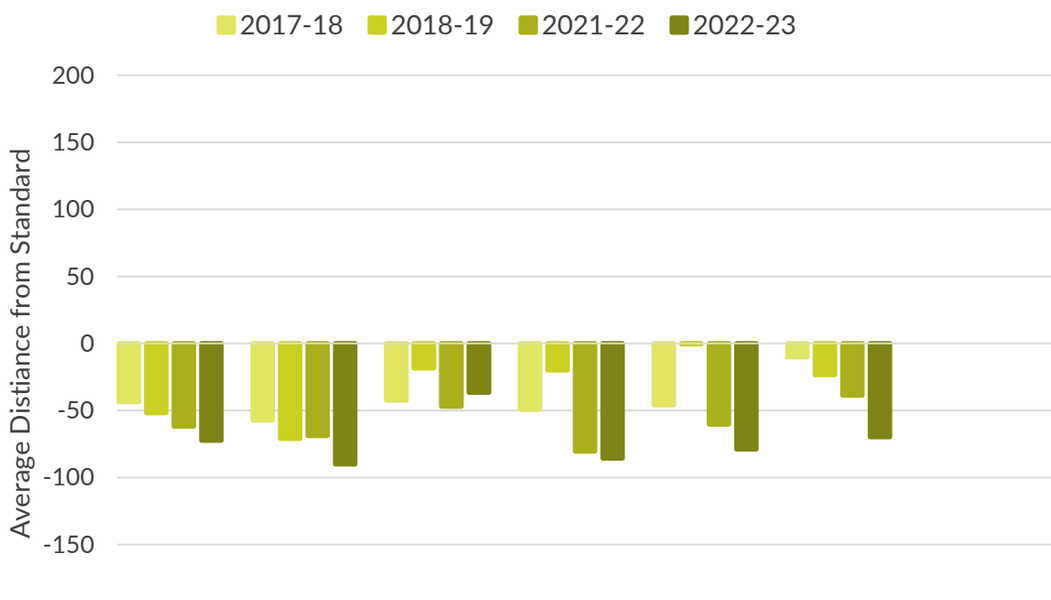
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

AVERAGE DISTANCE FROM STANDARD BY GRADE LEVEL

ENGLISH & LANGUAGE ARTS

PIPELINE ANALYSIS

Distance from Standard

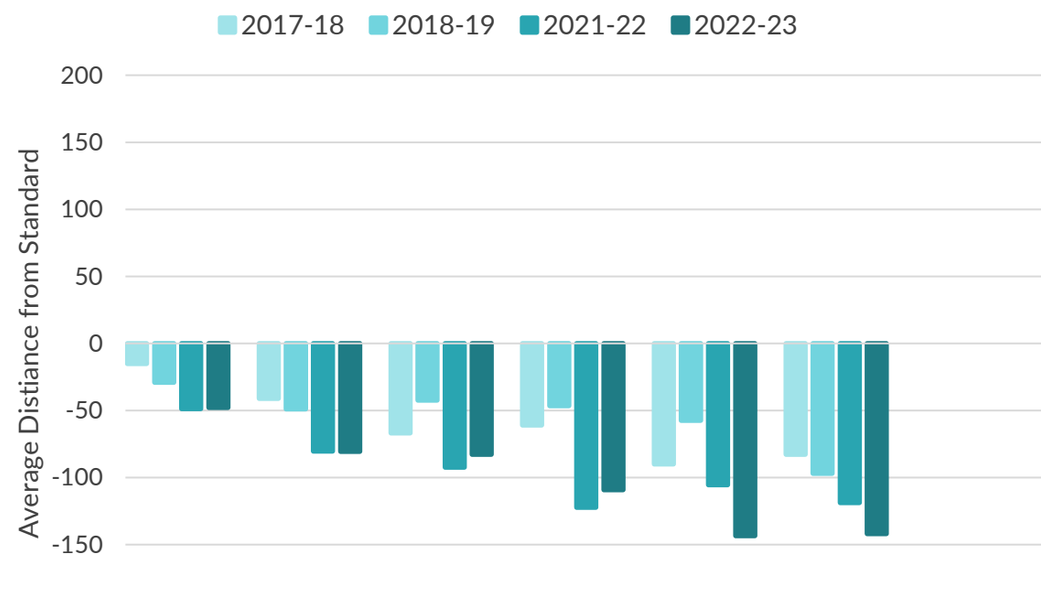


	3rd	4th	5th	6th	7th	8th	11th
2017-18	-44	-57	-42	-49	-46	-10	0
2018-19	-52	-71	-18	-20	0	-24	0
2021-22	-62	-69	-47	-81	-60	-39	0
2022-23	-72	-90	-37	-86	-79	-70	0

MATHEMATICS

PIPELINE ANALYSIS

Distance from Standard



	3rd	4th	5th	6th	7th	8th	11th
2017-18	-15	-41	-67	-61	-90	-83	0
2018-19	-29	-49	-42	-47	-58	-97	0
2021-22	-49	-80	-92	-122	-106	-119	0
2022-23	-48	-81	-83	-109	-144	-142	0

The grade-specific average distance from standard (DFS) is calculated using the mean scale score from the CAASPP research file. The distance from standard is how far above or below a student's scale score is from the minimum scale scale needed to achieve "Standard Met" in English language arts and mathematics. This minimum scale score threshold differs by grade level.

Note: The CA School Dashboard Academic Indicator inclusion and exclusion rules are not applied to the DFS calculation.

STUDENT GROUP ANALYSIS

ENGLISH & LANGUAGE ARTS

FEMALE

	Tested	Local	County	State
21-22	32%	8%	17%	23%
		19%	27%	28%
		25%	25%	22%
		48%	31%	27%
	340			

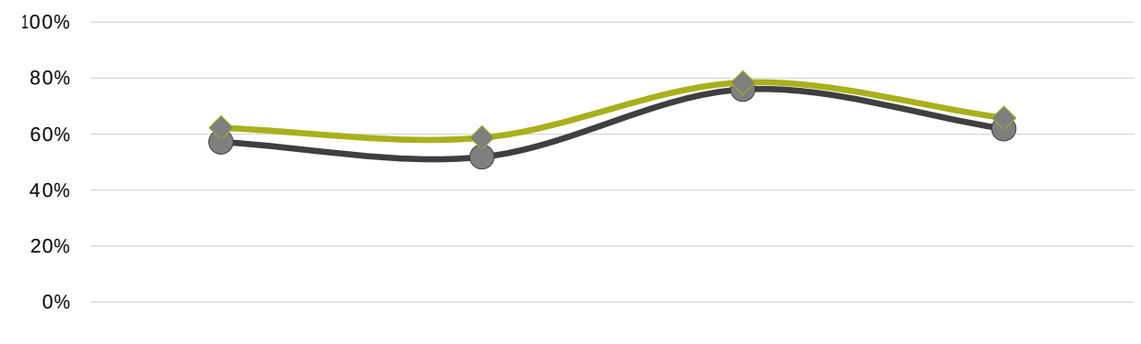
Change: -5.6%

Scores: 339

22-23 Met + Exceeded	
3rd	30%
4th	31%
5th	29%
6th	27%
7th	17%
8th	26%
11th	-

ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above



	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
FEMALE	62% ▼ -5.3%	59% ▼ -4.0%	78% ▼ -0.6%	66% ▼ -5.9%

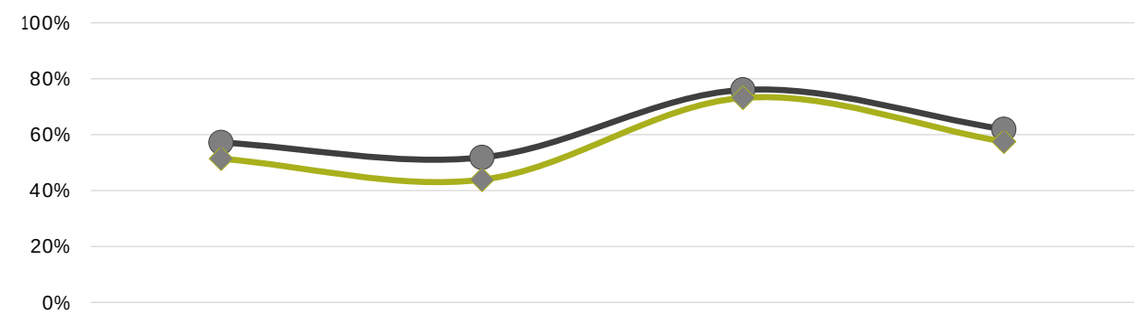
MALE

	Tested	Local	County	State
21-22	27%	6%	13%	18%
		13%	23%	24%
		20%	24%	22%
		61%	40%	35%
	294			

Change: -7.5%

Scores: 294

22-23 Met + Exceeded	
3rd	19%
4th	10%
5th	36%
6th	10%
7th	25%
8th	18%
11th	-



	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
MALE	51% ▼ -5.3%	44% ▼ -3.0%	73% ▲ 0.0%	57% ▼ -7.2%

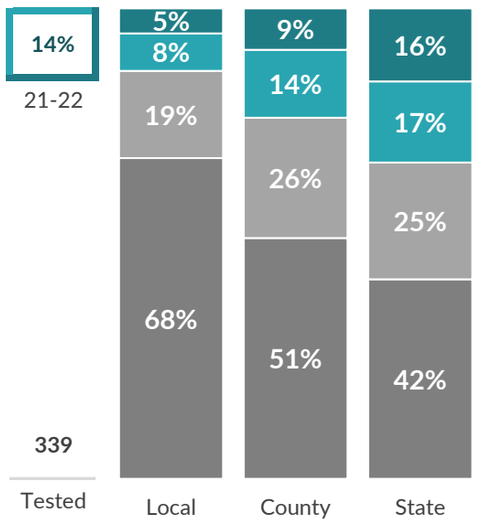
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

ardino County Office of Education Norton Science and Language Academy (San Bernardino)

MATHEMATICS

FEMALE

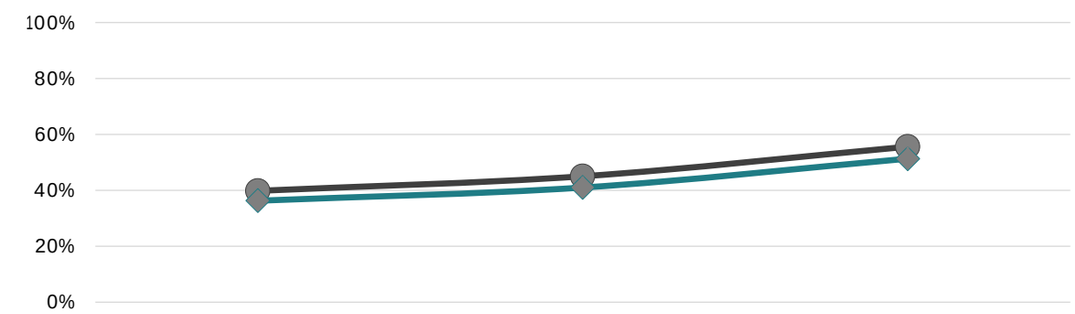


-0.7%
Change
339
Scores

22-23 Met + Exceeded	
3rd	21%
4th	20%
5th	13%
6th	13%
7th	5%
8th	9%
11th	-

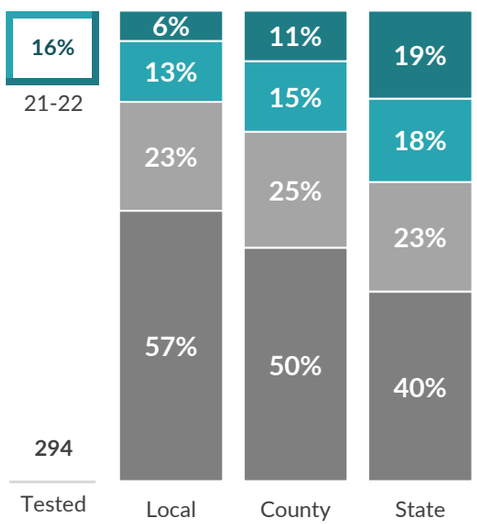
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above



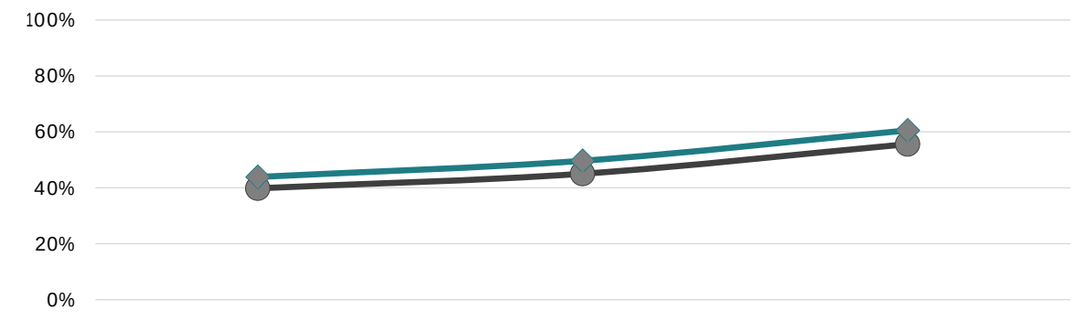
	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
● ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
◆ FEMALE	36% ▼ -6.8%	41% ▼ -4.6%	51% ▼ -7.9%

MALE



3.3%
Change
294
Scores

22-23 Met + Exceeded	
3rd	43%
4th	18%
5th	22%
6th	15%
7th	12%
8th	11%
11th	-



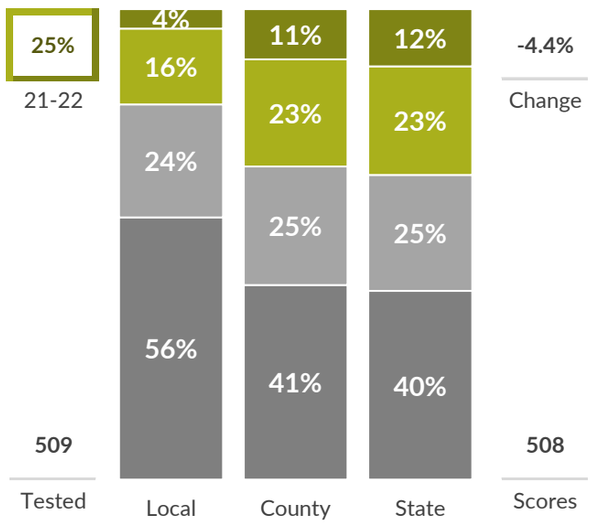
● ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
◆ MALE	44% ▼ -1.9%	50% ▼ -1.0%	61% ▲ 2.1%

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

ENGLISH & LANGUAGE ARTS

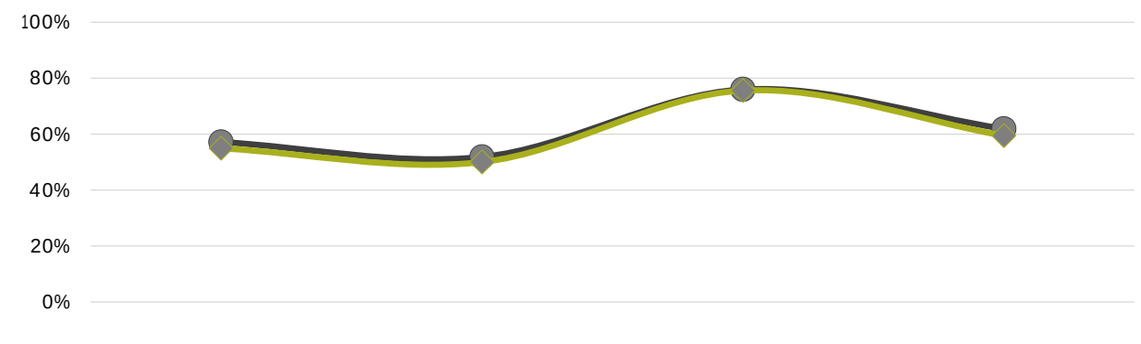
ECONOMICALLY DISADVANTAGED (ECD)



22-23 Met + Exceeded	
3rd	22%
4th	18%
5th	28%
6th	15%
7th	20%
8th	20%
11th	-

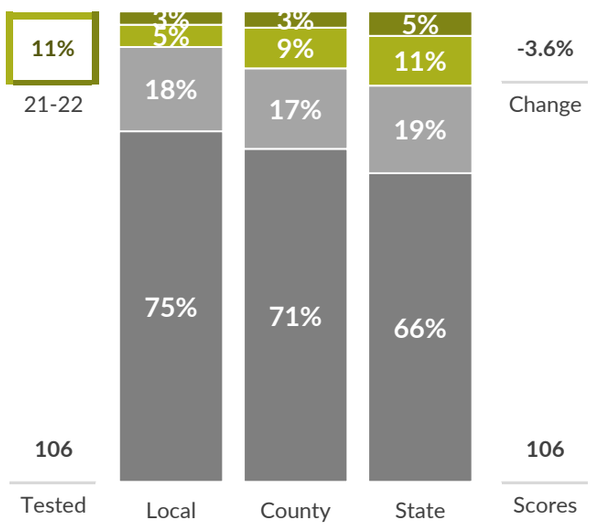
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

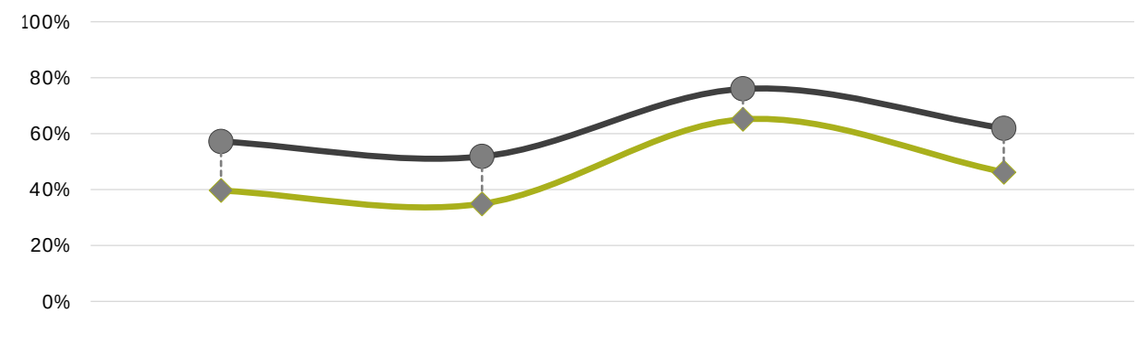


	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
ECD	55% ▼ -4.7%	50% ▼ -1.7%	76% ▲ 1.2%	59% ▼ -6.3%

STUDENTS WITH DISABILITIES (SWD)



22-23 Met + Exceeded	
3rd	0%
4th	17%
5th	23%
6th	0%
7th	12%
8th	0%
11th	-



	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
SWD	40% ▼ -1.5%	35% ▲ 6.0%	65% ▲ 10.7%	46% ▼ -4.9%

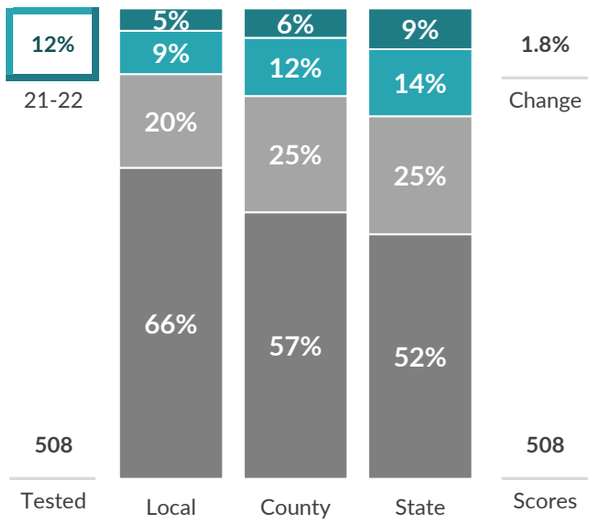
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

ardino County Office of Education Norton Science and Language Academy (San Bernardino)

MATHEMATICS

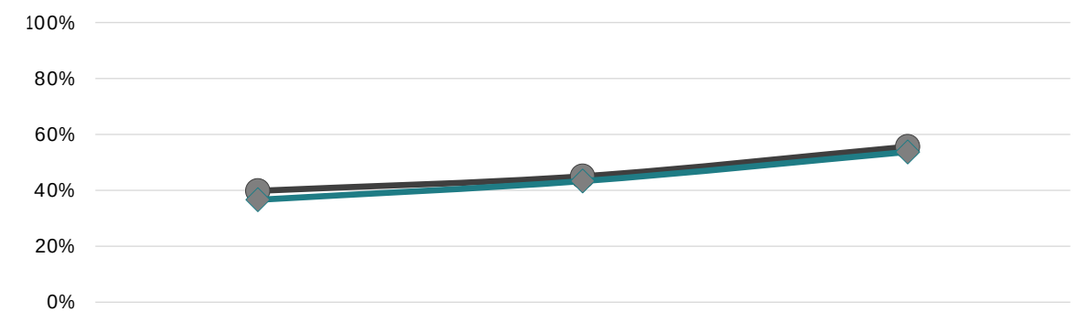
ECONOMICALLY DISADVANTAGED (ECD)



22-23 Met + Exceeded	
3rd	28%
4th	19%
5th	11%
6th	10%
7th	8%
8th	8%
11th	-

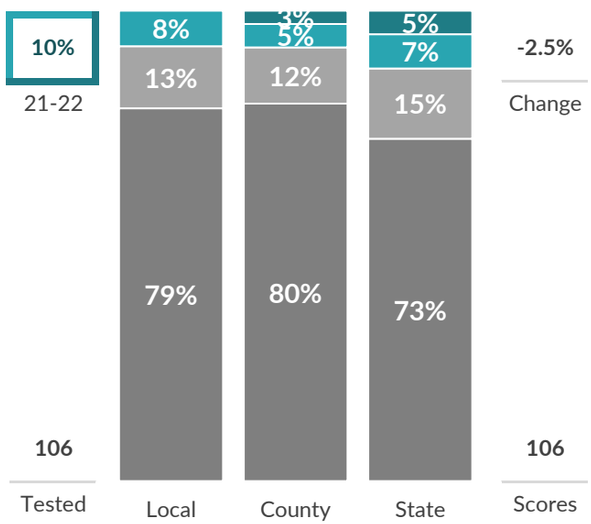
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

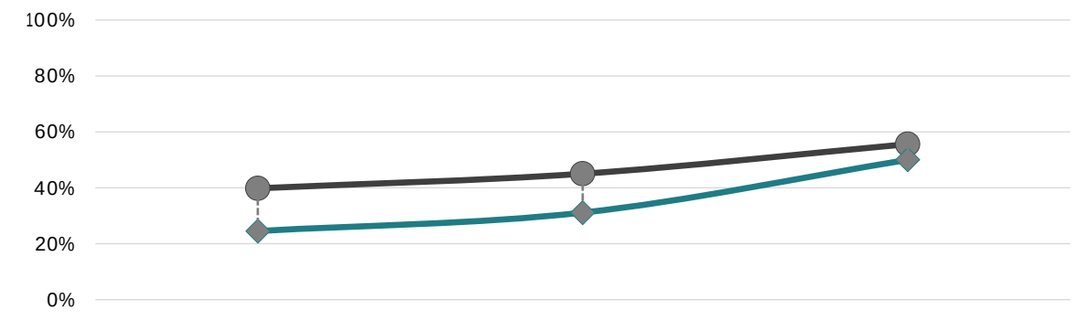


	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
ECD	37% ▼ -3.5%	43% ▼ -0.4%	54% ▼ -2.6%

STUDENTS WITH DISABILITIES (SWD)



22-23 Met + Exceeded	
3rd	6%
4th	17%
5th	15%
6th	11%
7th	4%
8th	0%
11th	-



	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
SWD	25% ▲ 0.1%	31% ▲ 6.7%	50% ▲ 11.1%

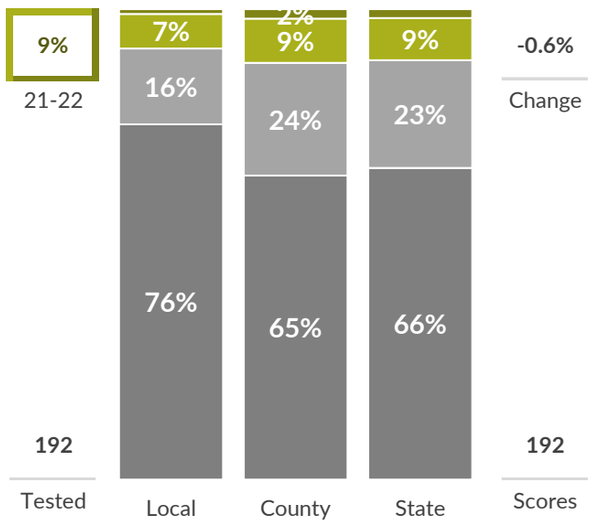
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

ardino County Office of Education Norton Science and Language Academy (San Bernardino)

ENGLISH & LANGUAGE ARTS

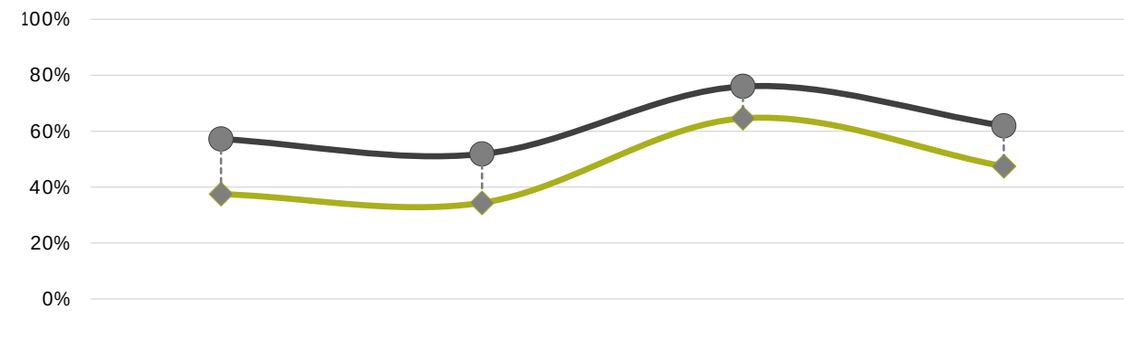
ENGLISH LEARNER (EL)



22-23 Met + Exceeded	
3rd	21%
4th	11%
5th	12%
6th	7%
7th	0%
8th	0%
11th	-

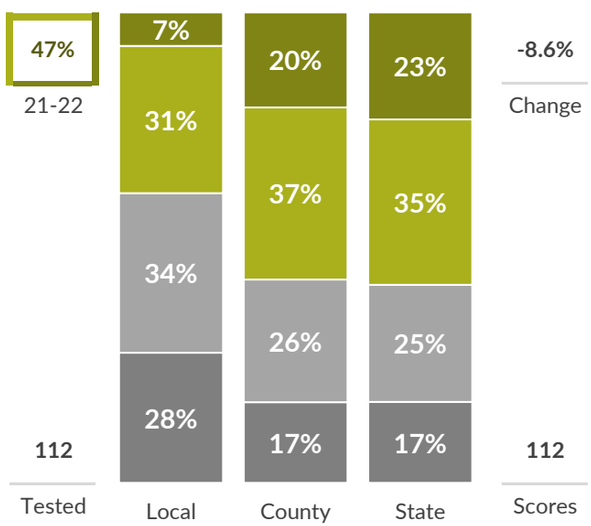
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

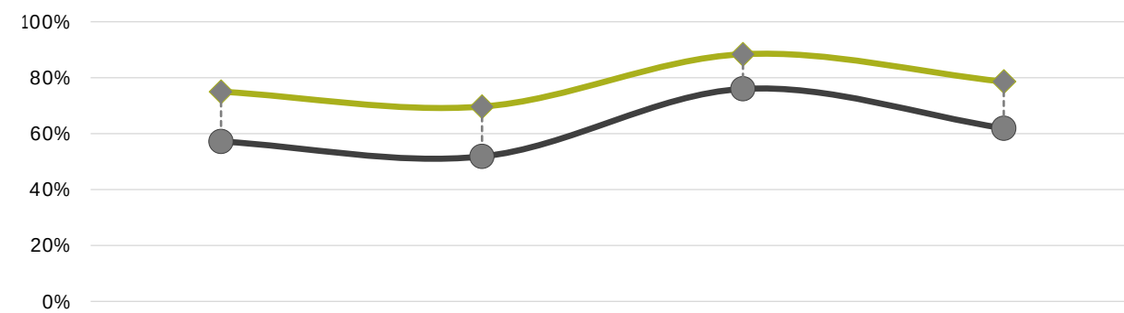


	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
EL	38% ▼ -6.2%	34% ▼ -3.0%	65% ▼ -1.2%	47% ▼ -6.3%

RECLASSIFIED FLUENT ENGLISH PROFICIENT (RFEP)



22-23 Met + Exceeded	
3rd	-
4th	-
5th	62%
6th	26%
7th	32%
8th	39%
11th	-



	Reading	Writing	Listening	Research & Inquiry
ALL	57% ▼ -5.1%	52% ▼ -3.3%	76% ▼ -0.2%	62% ▼ -6.4%
RFEP	75% ▼ -8.0%	70% ▼ -3.4%	88% ▼ -0.6%	79% ▼ -9.4%

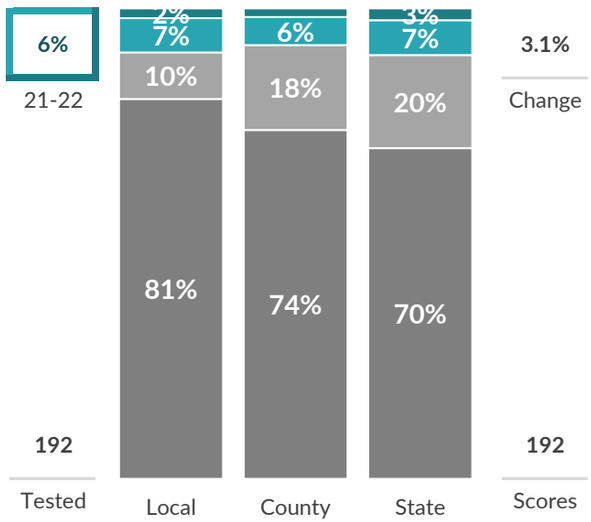
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

ardino County Office of Education Norton Science and Language Academy (San Bernardino)

MATHEMATICS

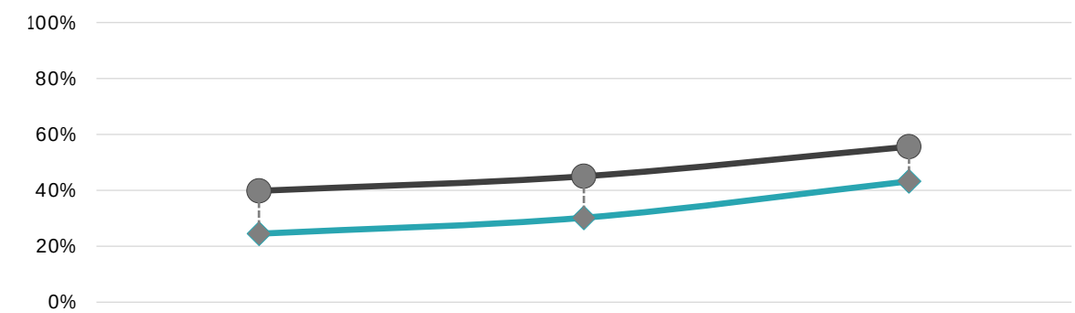
ENGLISH LEARNER (EL)



22-23 Met + Exceeded	
3rd	38%
4th	11%
5th	4%
6th	5%
7th	0%
8th	0%
11th	-

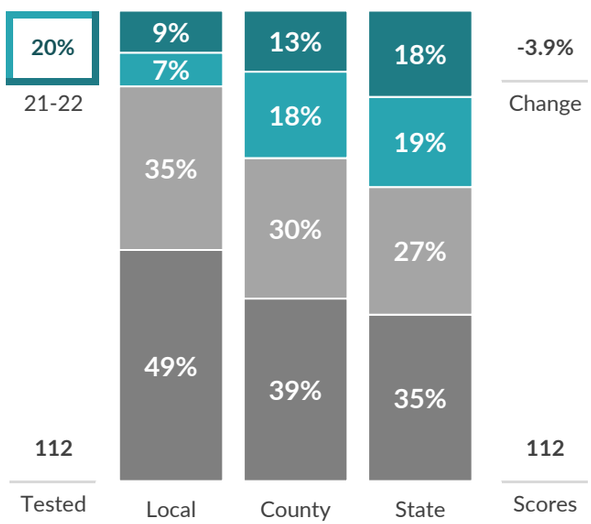
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

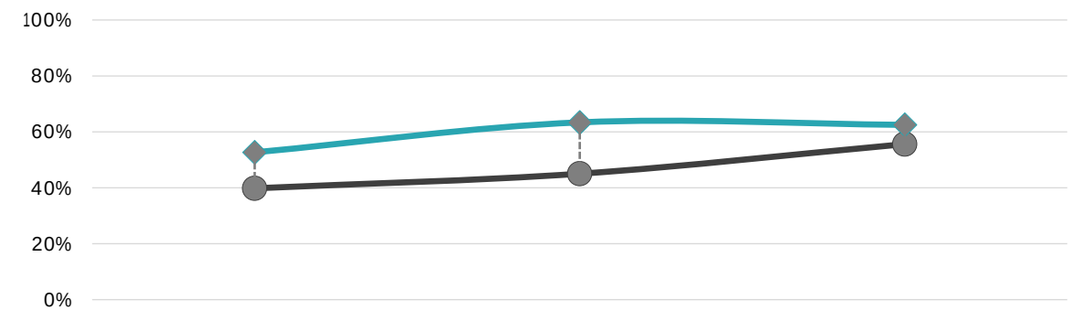


	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
EL	24% ▲ 2.4%	30% ▼ -0.3%	43% ▲ 1.1%

RECLASSIFIED FLUENT ENGLISH PROFICIENT (RFEP)



22-23 Met + Exceeded	
3rd	-
4th	-
5th	8%
6th	22%
7th	7%
8th	21%
11th	-



ALL	40% ▼ -4.6%	45% ▼ -3.0%	56% ▼ -3.2%
RFEP	53% ▼ -10.3%	63% ▼ -4.6%	63% ▼ -4.5%

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

www.parseceducation.com

36103630115808
County Office of Education (COE)

Academy for Academic Excellence's

STATE TEST

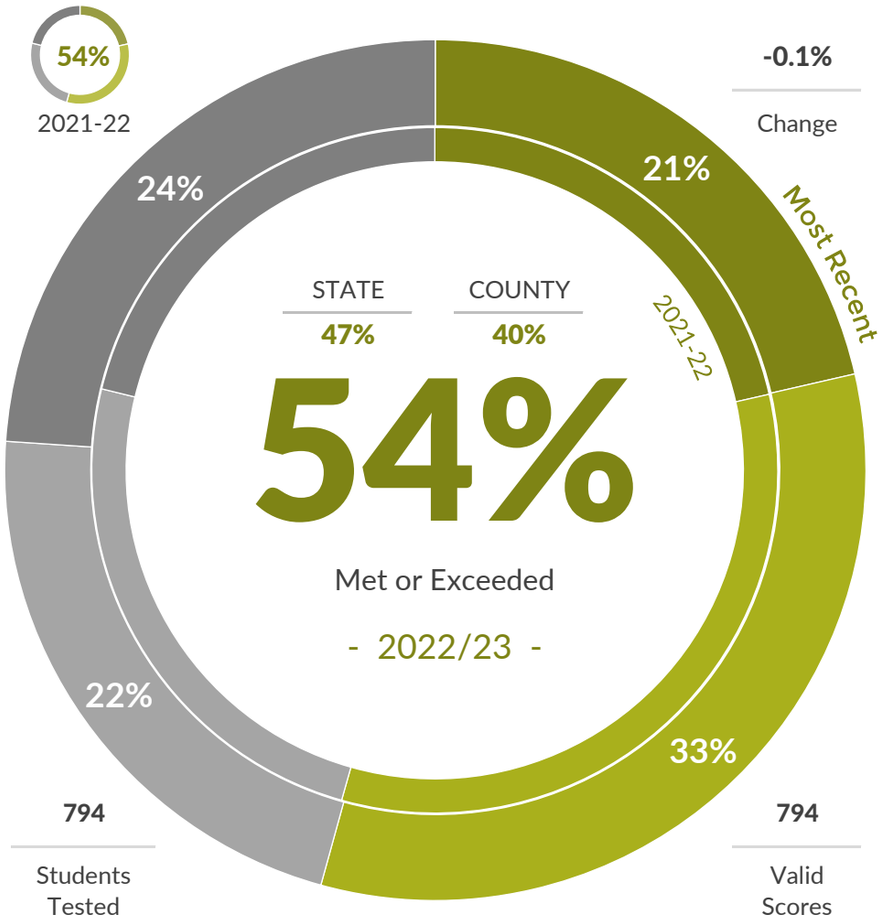
English & Language Arts and Math Results for 2022-23

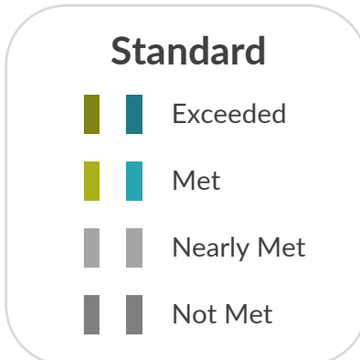
Data Source: CAASPP Research Data Files
Designed by Pantic Education, Inc.

OVERALL

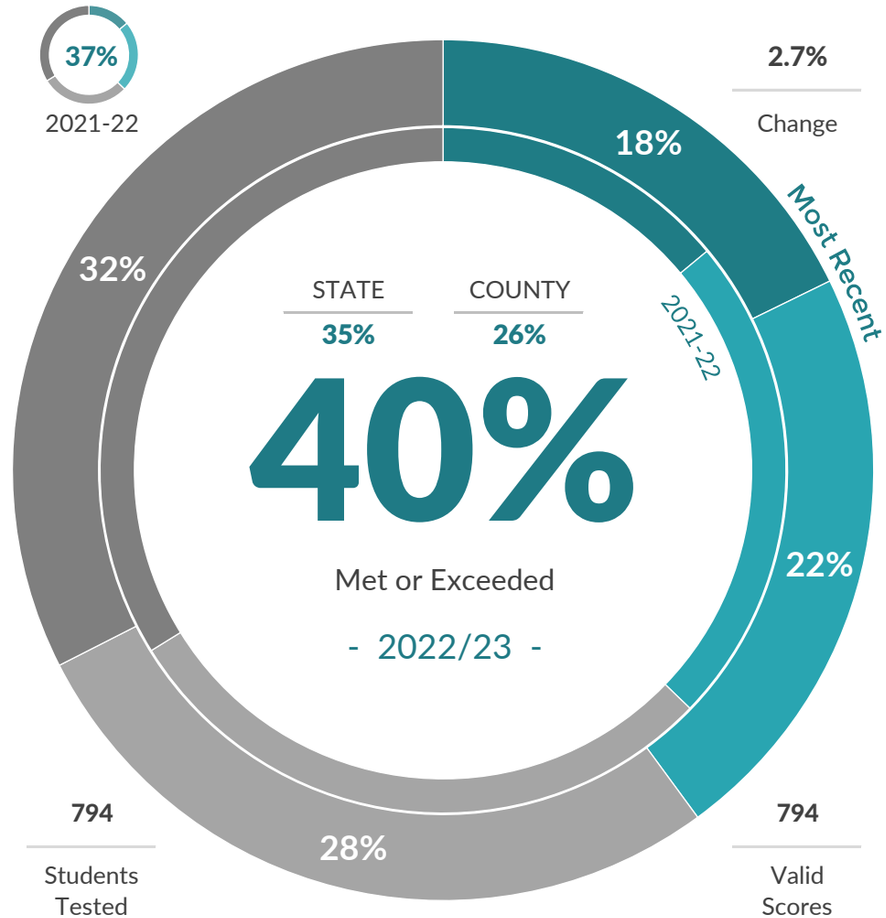
Apple Valley Unified Academy for Academic Excellence (San Bernardino)

ENGLISH & LANGUAGE ARTS





MATHEMATICS



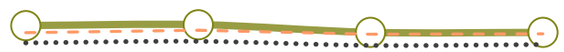
School Year	Total Enrollment	Unduplicated Count		Low Income		English Learner		Foster Youth		Homeless		Migrant	
2021/22	**1,456**	**589**	40%	**577**	40%	**54**	4%	**2**	0.1%	**6**	0.4%	**0**	0.0%
2022/23	**1,484**	**655**	44%	**640**	43%	**66**	4%	**3**	0.2%	**9**	0.6%	**0**	0.0%
	28	66	3.7%	63	3.5%	12	0.7%	1	0.1%	3	0.2%	0	0.0%

MULTI-YEAR TREND

ENGLISH & LANGUAGE ARTS

4-YEAR TREND LINE

---- Statewide Average
····· Countywide Average



	17-18	18-19	21-22	22-23	Avg. Multi-Year Change
Exceeded	25%	25%	21%	21%	**-1.1%**
Met	32%	35%	33%	33%	**0.3%**
Nearly Met	24%	21%	24%	22%	**-0.9%**
Not Met	19%	18%	21%	24%	**1.7%**

MATHEMATICS

4-YEAR TREND LINE

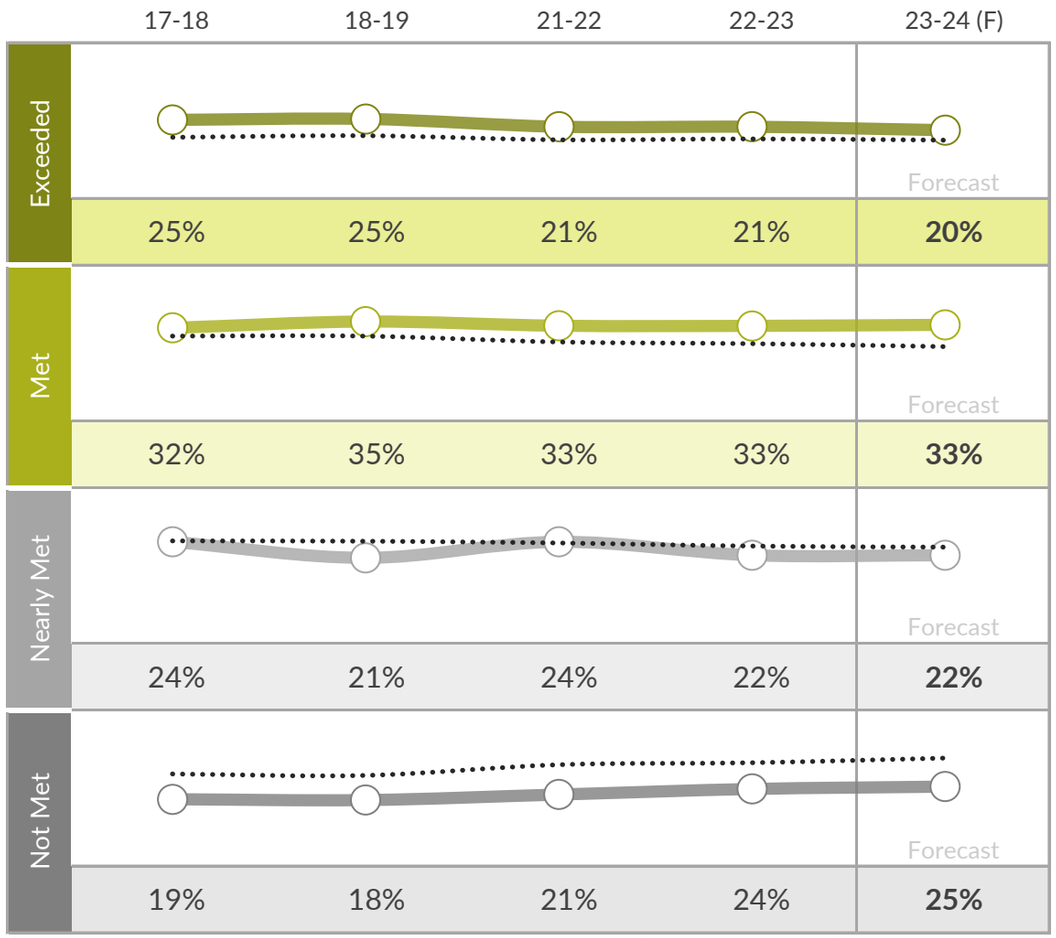
---- Statewide Average
····· Countywide Average

	17-18	18-19	21-22	22-23	Avg. Multi-Year Change
Exceeded	14%	17%	14%	18%	**1.3%**
Met	24%	24%	23%	22%	**-0.5%**
Nearly Met	31%	31%	29%	28%	**-1.2%**
Not Met	31%	28%	34%	32%	**0.4%**

FORECAST (F)

ENGLISH & LANGUAGE ARTS

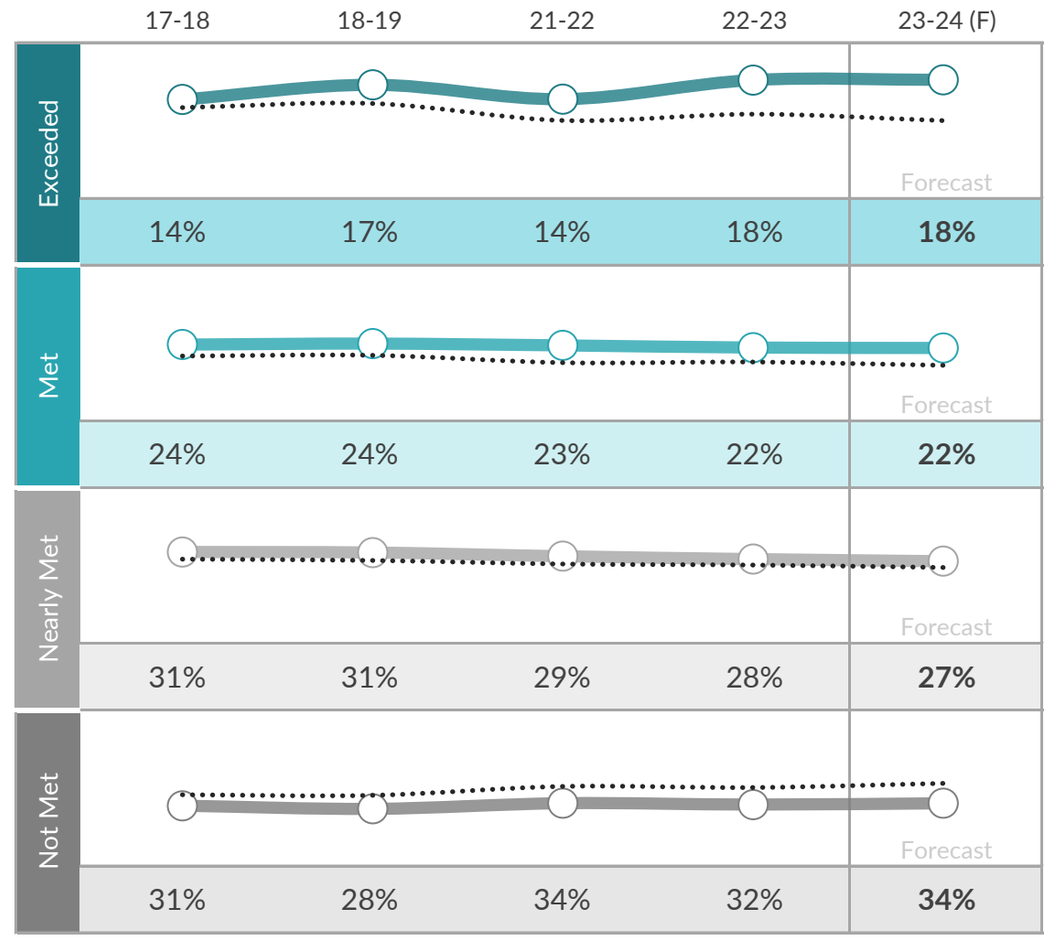
5-YEAR FORECAST LINE ····· Countywide Average



*Future value(s) are predicted based on existing 4-year historical values by using the linear forecast algorithm. The percentages in the last column may not add up to an exact 100%. Past performance is no guarantee of future results.

MATHEMATICS

5-YEAR FORECAST LINE ····· Countywide Average



GRADE LEVEL

ENGLISH & LANGUAGE ARTS

Not Met | Nearly Met | Met | Exceeded | Statewide | Countywide

BY GRADE LEVEL

Grade	22-23 Achievement Results				Scores
3rd	39%	22%	19%	20%	112
4th	39%	25%	21%	15%	110
5th	28%	16%	33%	24%	109
6th	24%	26%	34%	16%	117
7th	14%	27%	43%	16%	121
8th	15%	23%	39%	23%	120
11th	10%	11%	40%	39%	105

% MET + EXCEEDED

Grade	17-18	18-19	21-22	22-23
3rd	40%	50%	35%	38%
4th	51%	55%	50%	35%
5th	57%	58%	44%	57%
6th	55%	61%	53%	50%
7th	60%	59%	60%	59%
8th	60%	64%	66%	62%
11th	75%	79%	74%	79%

MATHEMATICS

Not Met | Nearly Met | Met | Exceeded | Statewide | Countywide

BY GRADE LEVEL

Grade	22-23 Achievement Results				Scores
3rd	36%	22%	25%	17%	112
4th	30%	34%	26%	10%	110
5th	28%	28%	18%	26%	109
6th	32%	26%	20%	22%	117
7th	31%	30%	22%	17%	121
8th	33%	33%	17%	18%	120
11th	37%	21%	28%	14%	105

% MET + EXCEEDED

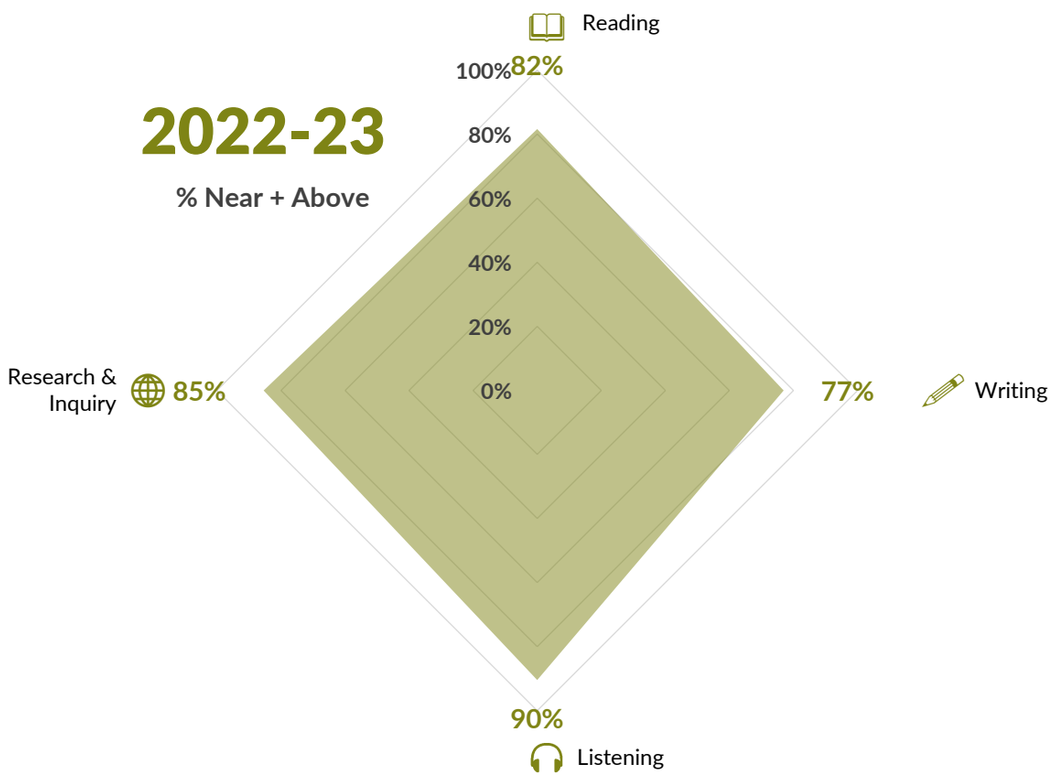
Grade	17-18	18-19	21-22	22-23
3rd	39%	46%	44%	42%
4th	39%	40%	45%	36%
5th	35%	31%	40%	44%
6th	38%	42%	32%	42%
7th	35%	50%	32%	39%
8th	31%	33%	29%	35%
11th	49%	44%	41%	42%

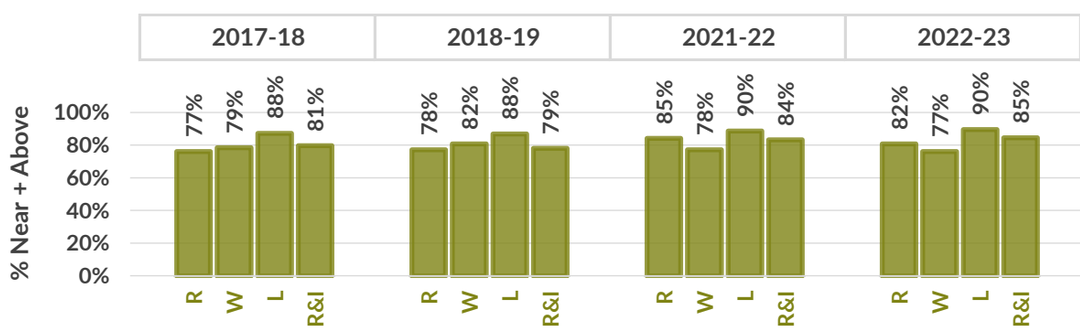
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

CLAIM AREA PERFORMANCE IN 2022-23

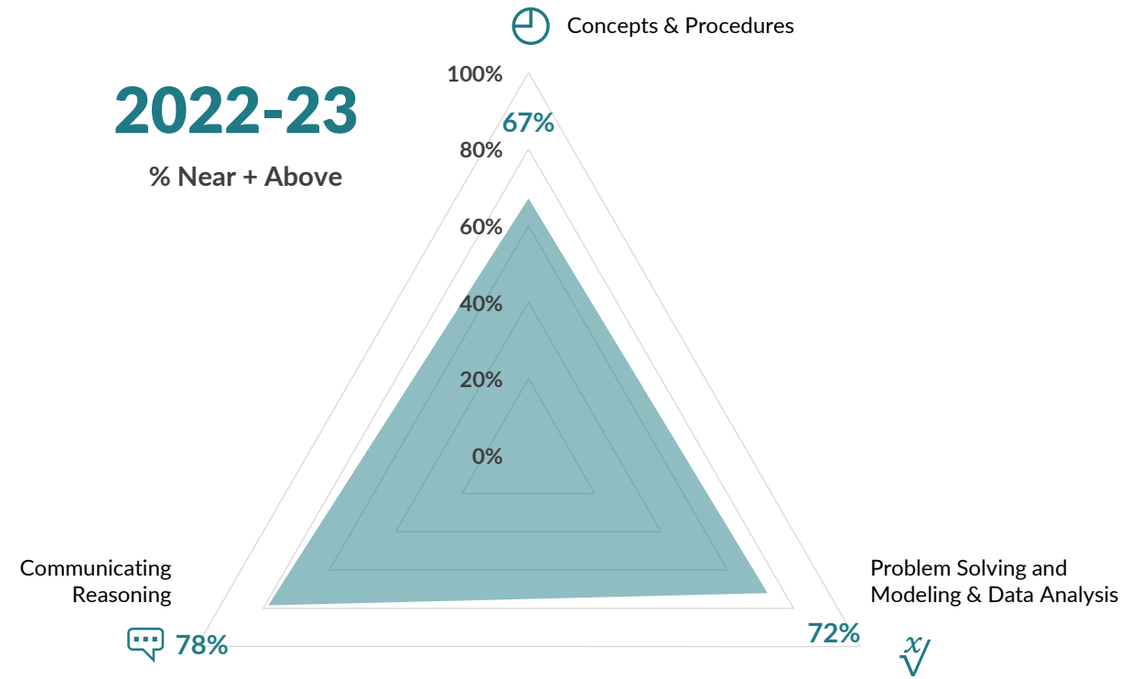
Apple Valley Unified Academy for Academic Excellence (San Bernardino)

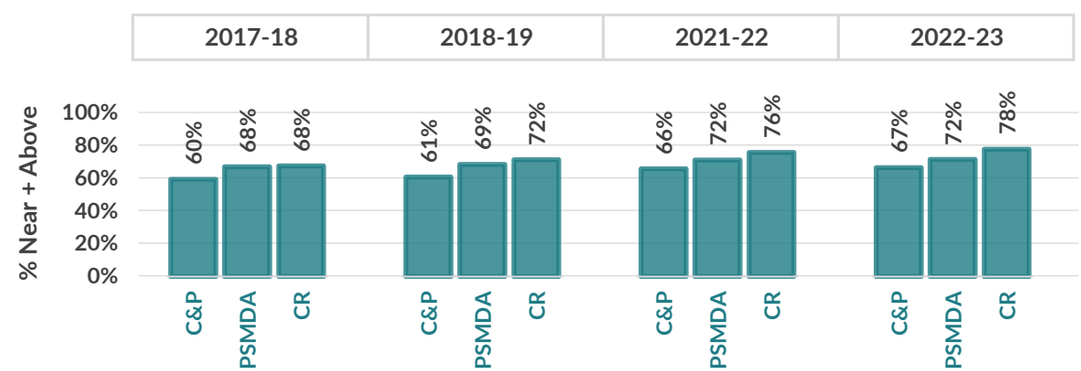
ENGLISH & LANGUAGE ARTS





MATHEMATICS





Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

CLAIM AREA PERFORMANCE IN 2022-23

ENGLISH & LANGUAGE ARTS

ELA Performance Levels: Below Near Above

Claim Area	3rd	4th	5th	6th	7th	8th	11th	Overall
Reading	19% / 54% / 27%	17% / 63% / 20%	19% / 62% / 18%	15% / 58% / 27%	21% / 69% / 10%	27% / 58% / 15%	36% / 52% / 11%	22% / 60% / 18%
Writing	7% / 54% / 38%	5% / 59% / 36%	24% / 53% / 23%	11% / 62% / 27%	22% / 62% / 16%	27% / 61% / 12%	46% / 44% / 10%	20% / 57% / 23%
Listening	12% / 71% / 17%	10% / 80% / 10%	17% / 74% / 8%	12% / 80% / 8%	18% / 74% / 8%	20% / 70% / 10%	26% / 69% / 6%	16% / 74% / 10%
Research & Inquiry	13% / 59% / 29%	5% / 71% / 25%	24% / 68% / 8%	17% / 66% / 17%	17% / 76% / 7%	23% / 67% / 10%	36% / 57% / 7%	19% / 66% / 15%

MATHEMATICS

Math Performance Levels: Below Near Above

Claim Area	3rd	4th	5th	6th	7th	8th	11th	Overall
Concepts & Procedures	19% / 45% / 37%	14% / 51% / 35%	24% / 52% / 24%	24% / 44% / 32%	21% / 49% / 30%	19% / 47% / 34%	24% / 38% / 38%	21% / 46% / 33%
Problem Solving and Modeling & Data Analysis	23% / 42% / 35%	11% / 53% / 36%	19% / 49% / 32%	12% / 61% / 27%	11% / 60% / 30%	16% / 66% / 18%	14% / 70% / 16%	15% / 57% / 28%
Communicating Reasoning	17% / 61% / 22%	13% / 61% / 26%	19% / 60% / 21%	23% / 51% / 26%	15% / 68% / 17%	15% / 68% / 17%	14% / 64% / 22%	17% / 62% / 22%

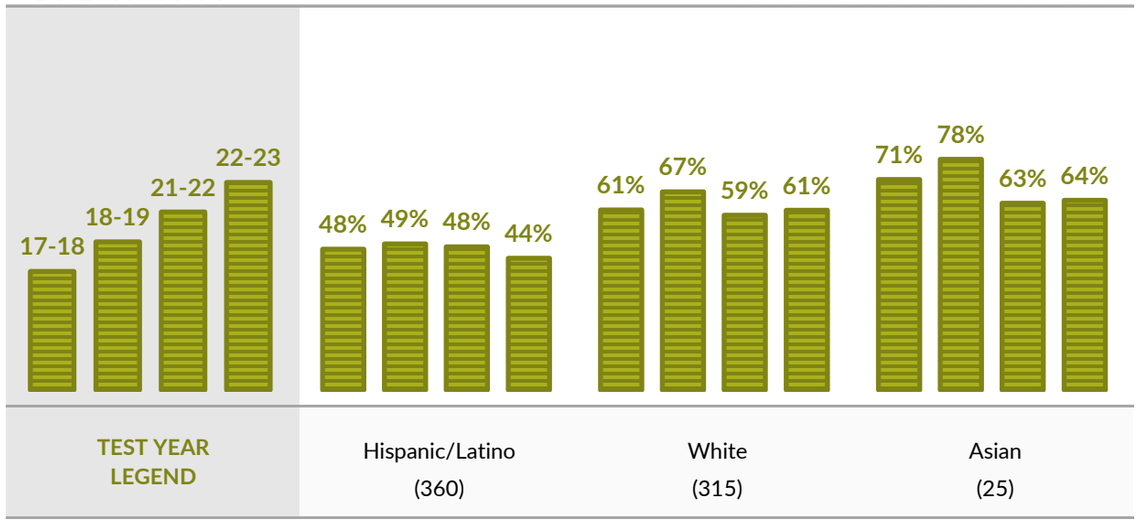
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

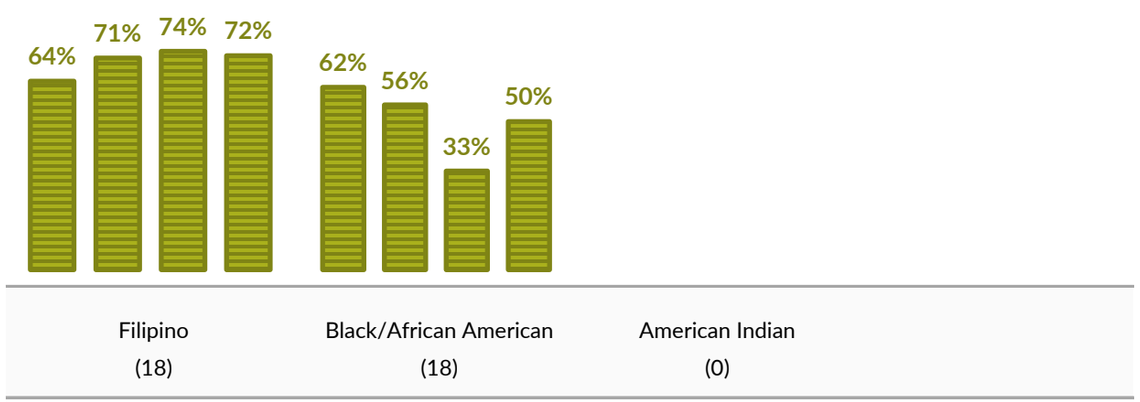
ETHNICITY

ENGLISH & LANGUAGE ARTS

BY ETHNICITY

% Met + Exceeded Across 4-Years

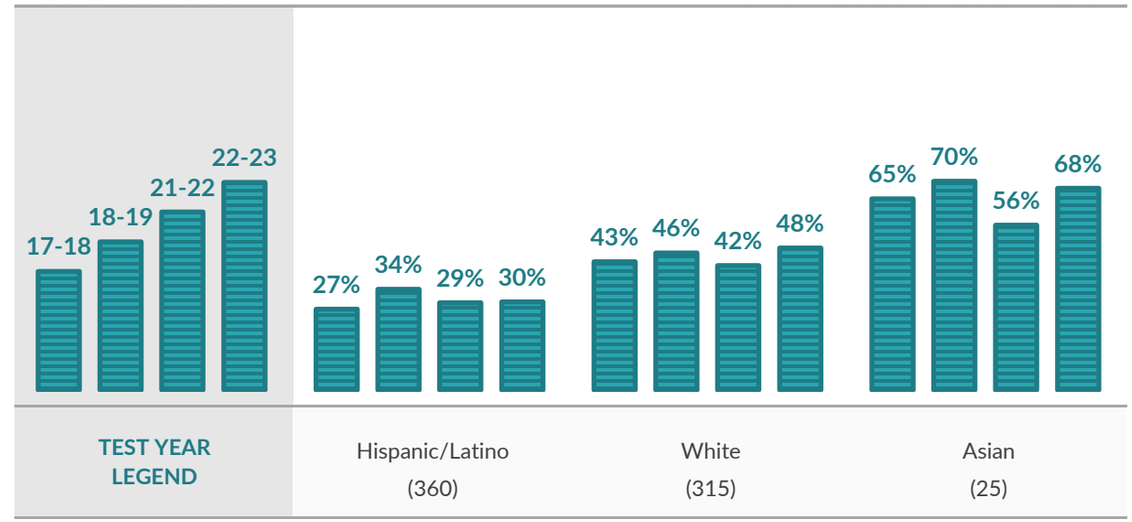


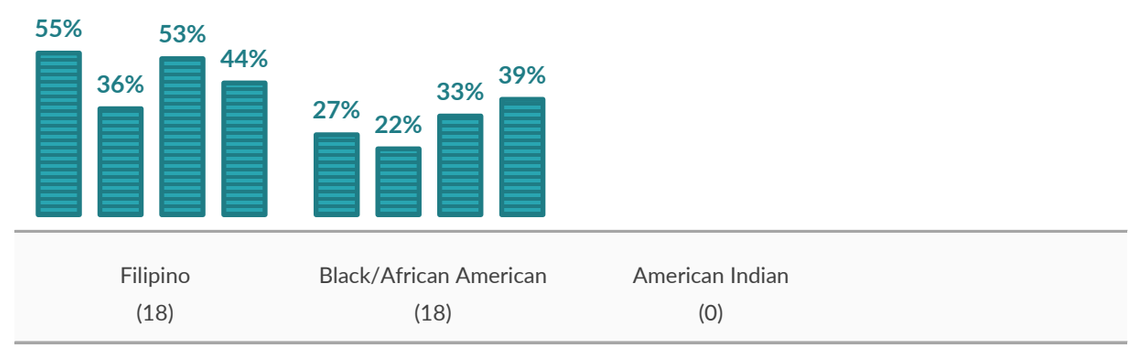


MATHEMATICS

BY ETHNICITY

% Met + Exceeded Across 4-Years



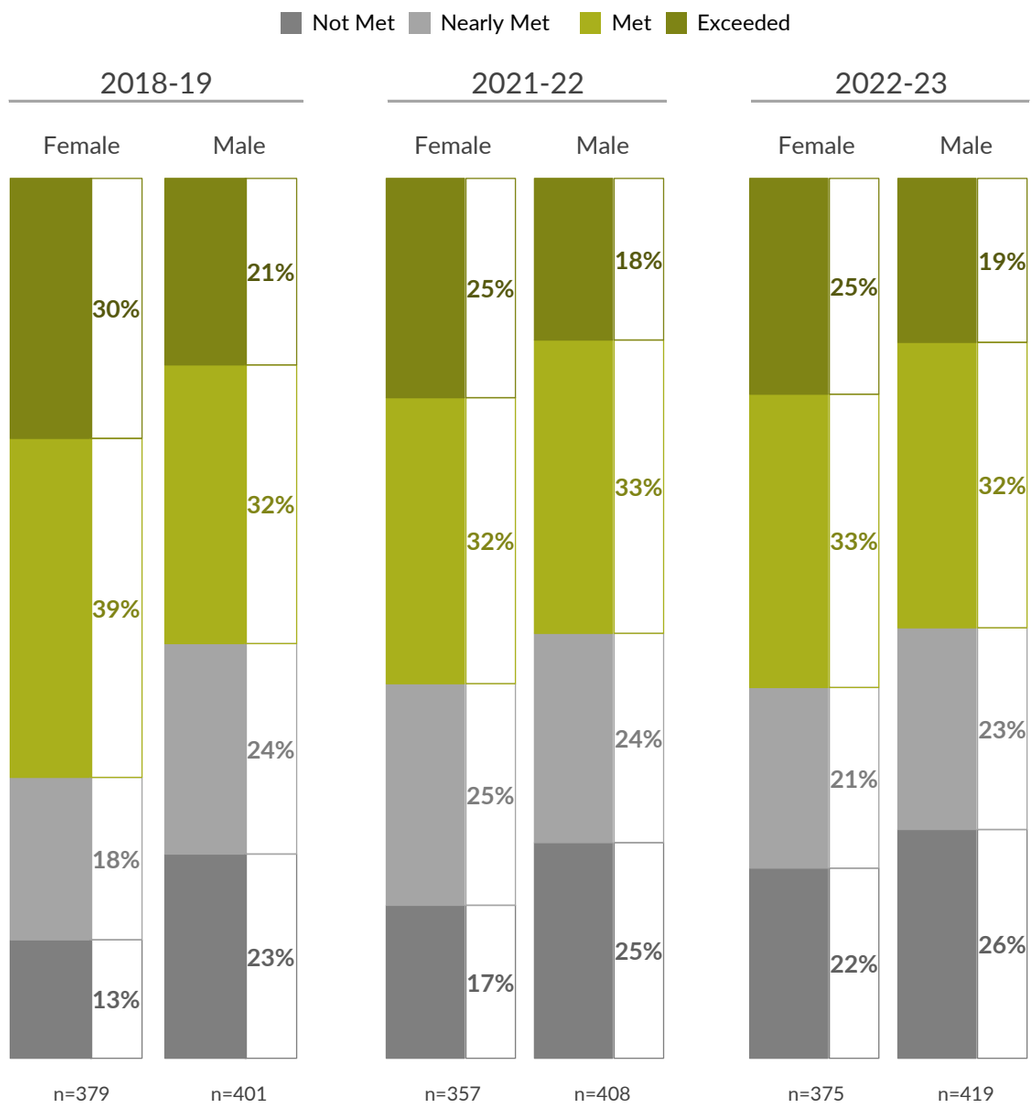


(#) = number of students with scores

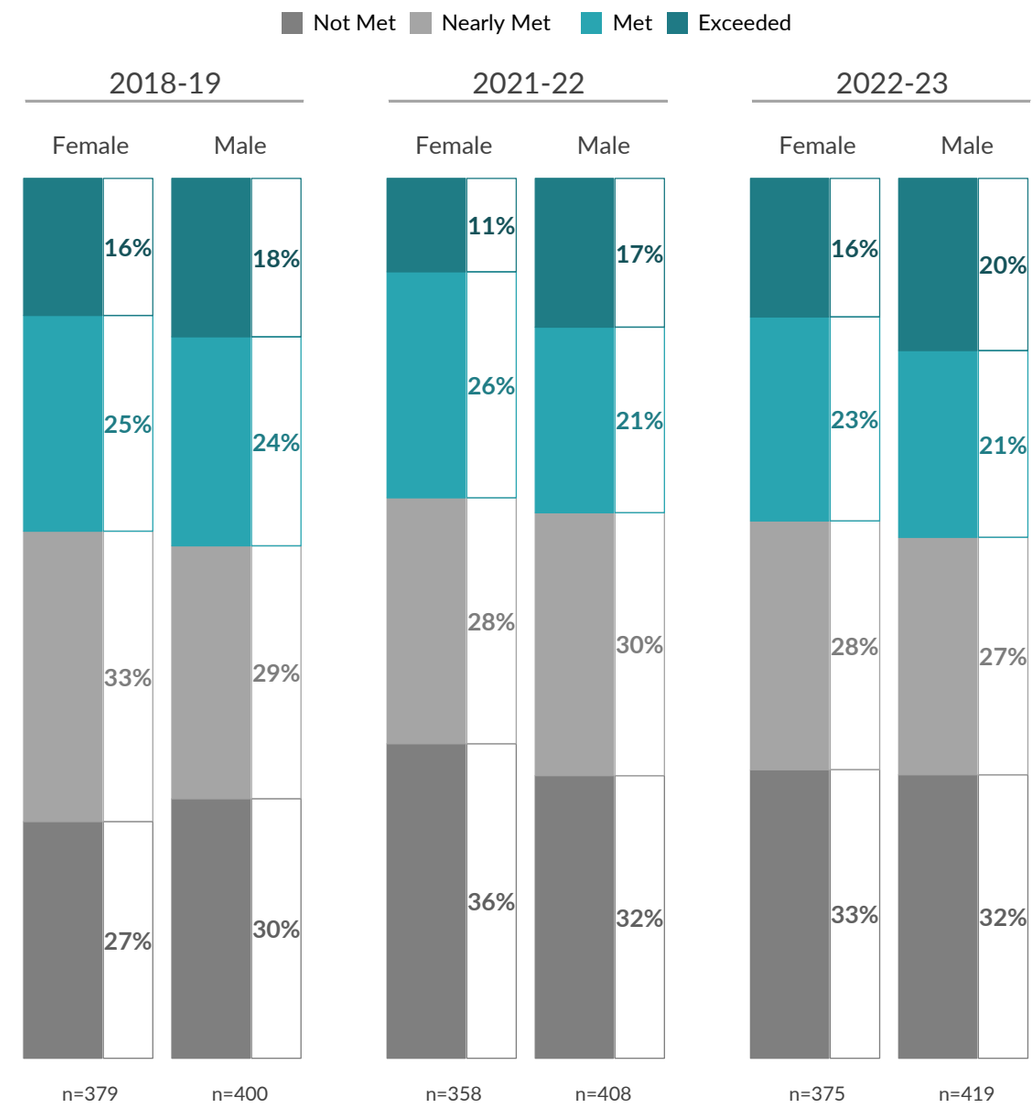
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

GENDER

ENGLISH & LANGUAGE ARTS



MATHEMATICS



*n = number of students with scores

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

COHORT

ENGLISH & LANGUAGE ARTS

COHORT ANALYSIS

% Met + Exceeded

Grade	17-18	18-19	21-22	22-23	Avg. Change
4th			35% (3rd)	35% (4th)	0.8% ▲
5th		-	50% (4th)	57% (5th)	7.4% ▲
6th	-	-	44% (5th)	50% (6th)	6.5% ▲
7th	-	50% (3rd)	53% (6th)	59% (7th)	4.6% ▲
8th	40% (3rd)	55% (4th)	60% (7th)	62% (8th)	7.3% ▲

MATHEMATICS

COHORT ANALYSIS

% Met + Exceeded

Grade	17-18	18-19	21-22	22-23	Avg. Change
4th			44% (3rd)	36% (4th)	-7.9% ▼
5th		-	45% (4th)	44% (5th)	-0.8% ▼
6th	-	-	40% (5th)	42% (6th)	1.7% ▲
7th	-	46% (3rd)	32% (6th)	39% (7th)	-3.8% ▼
8th	39% (3rd)	40% (4th)	32% (7th)	35% (8th)	-1.2% ▼

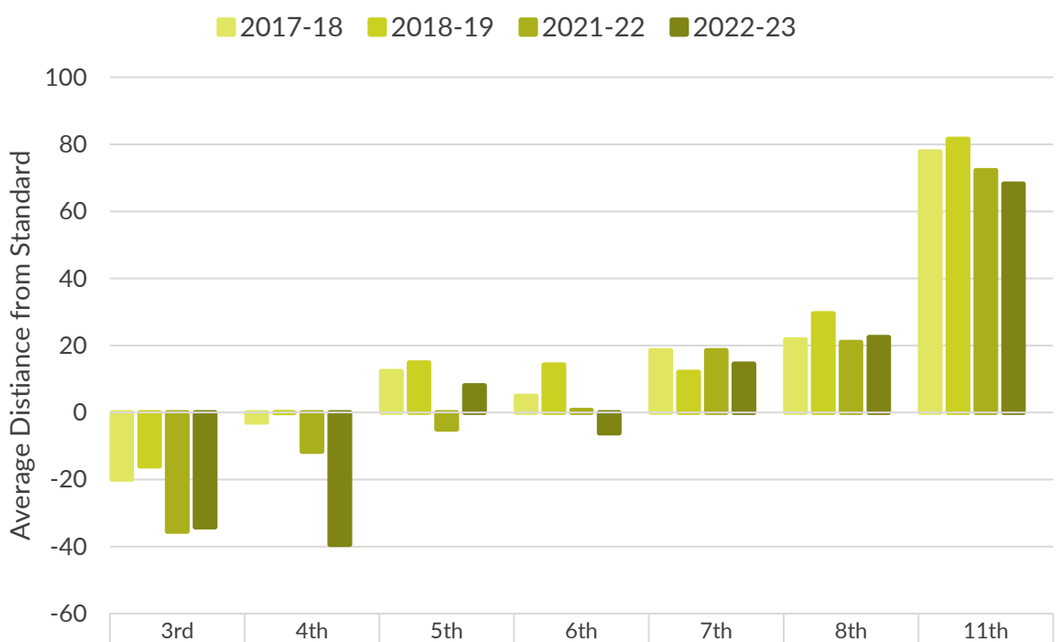
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

AVERAGE DISTANCE FROM STANDARD BY GRADE LEVEL

ENGLISH & LANGUAGE ARTS

PIPELINE ANALYSIS

Distance from Standard

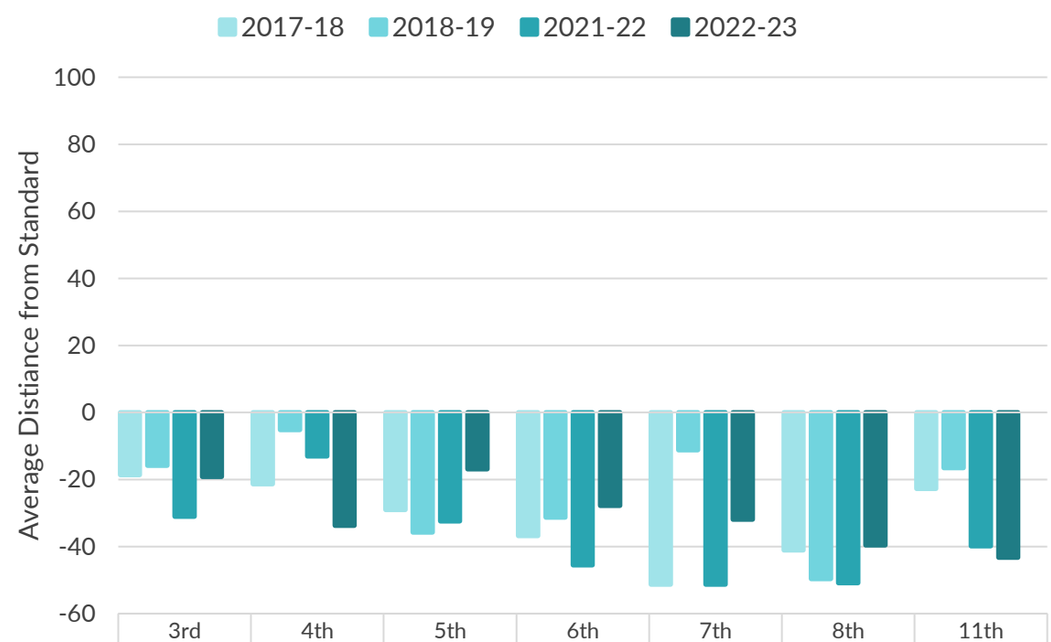


	3rd	4th	5th	6th	7th	8th	11th
2017-18	-20	-3	12	5	19	22	78
2018-19	-16	0	15	14	12	30	82
2021-22	-36	-12	-5	1	19	21	72
2022-23	-34	-39	8	-6	15	22	68

MATHEMATICS

PIPELINE ANALYSIS

Distance from Standard



	3rd	4th	5th	6th	7th	8th	11th
2017-18	-19	-21	-29	-37	-51	-41	-23
2018-19	-16	-5	-36	-31	-11	-50	-17
2021-22	-31	-13	-32	-46	-51	-51	-40
2022-23	-19	-34	-17	-28	-32	-40	-43

The grade-specific average distance from standard (DFS) is calculated using the mean scale score from the CAASPP research file. The distance from standard is how far above or below a student's scale score is from the minimum scale scale needed to achieve "Standard Met" in English language arts and mathematics. This minimum scale score threshold differs by grade level.

Note: The CA School Dashboard Academic Indicator inclusion and exclusion rules are not applied to the DFS calculation.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

ENGLISH & LANGUAGE ARTS

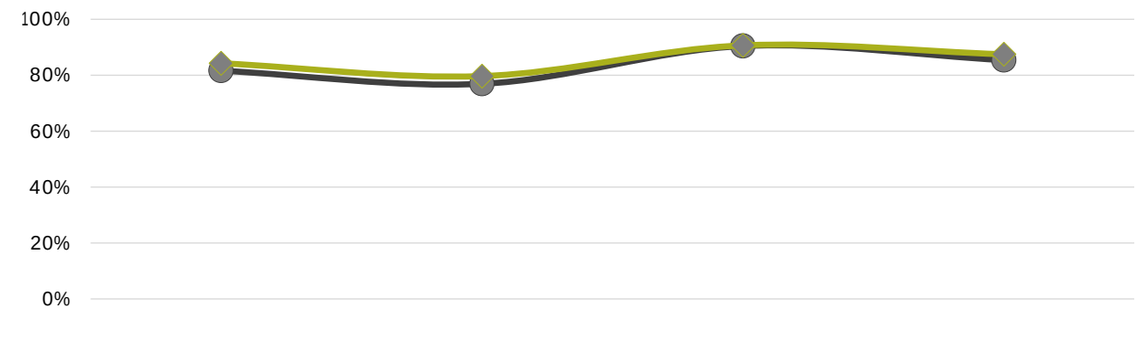
FEMALE

	Tested	Local	County	State
21-22	57%	25%	17%	23%
		33%	27%	28%
		21%	25%	22%
		22%	31%	27%
Change	0.4%			
Scores	375			

22-23 Met + Exceeded	
3rd	39%
4th	36%
5th	60%
6th	56%
7th	58%
8th	78%
11th	87%

ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

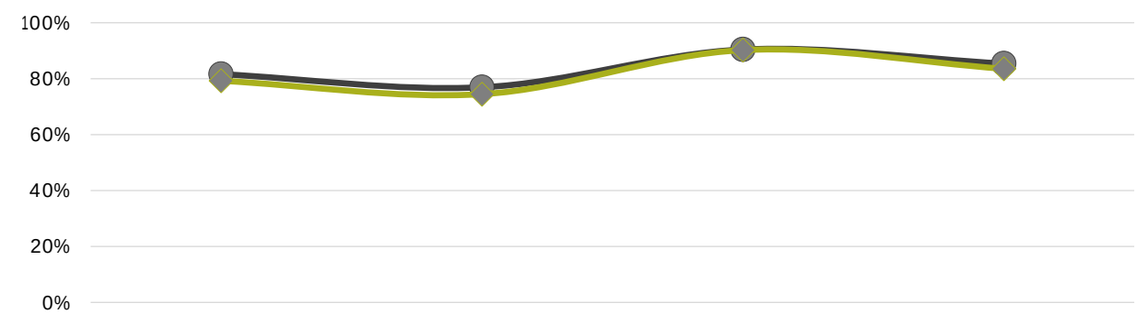


	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
FEMALE	84% ▼ -3.1%	80% ▼ -3.5%	91% ▲ 1.6%	87% ▲ 2.9%

MALE

	Tested	Local	County	State
21-22	52%	19%	13%	18%
		32%	23%	24%
		23%	24%	22%
		26%	40%	35%
Change	-0.6%			
Scores	419			

22-23 Met + Exceeded	
3rd	38%
4th	35%
5th	55%
6th	45%
7th	59%
8th	51%
11th	72%



	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
MALE	79% ▼ -3.9%	74% ▲ 0.9%	90% ▲ 0.3%	84% ▼ 0.0%

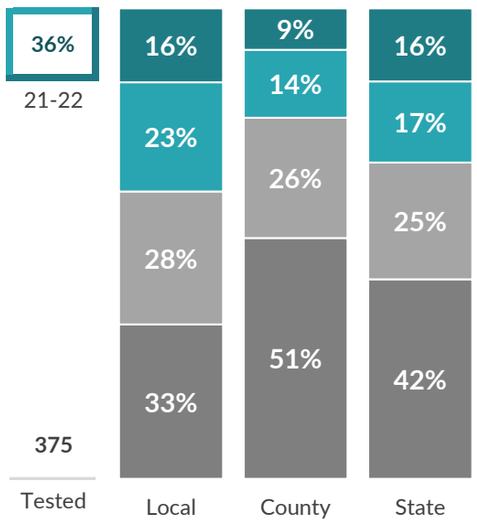
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

MATHEMATICS

FEMALE



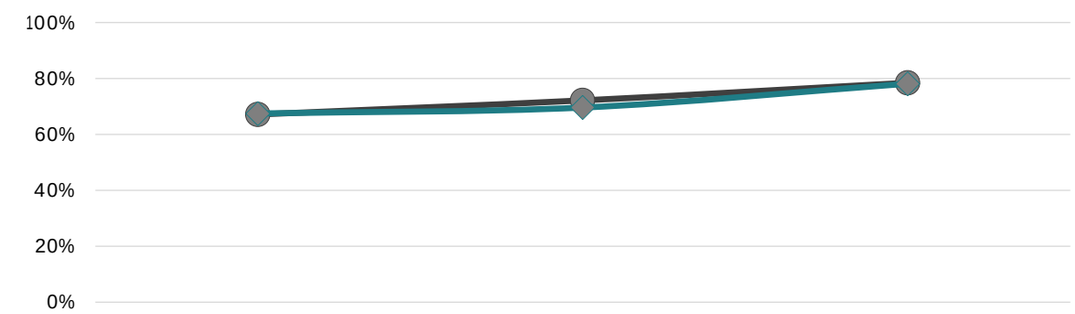
2.6% Change

375 Scores

22-23 Met + Exceeded	
3rd	39%
4th	31%
5th	40%
6th	47%
7th	35%
8th	35%
11th	47%

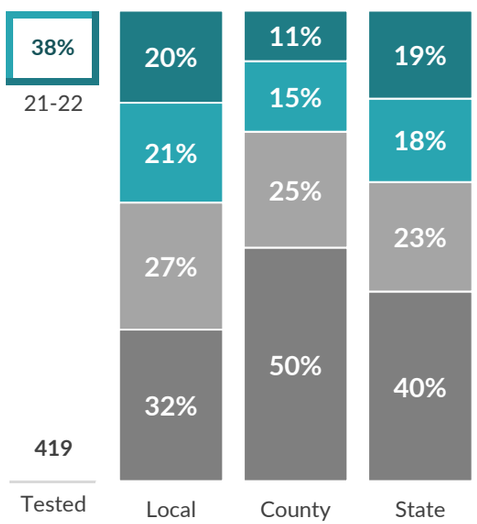
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above



	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
● ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
◆ FEMALE	67% ▲ 2.7%	70% ▼ -0.2%	78% ▲ 0.8%

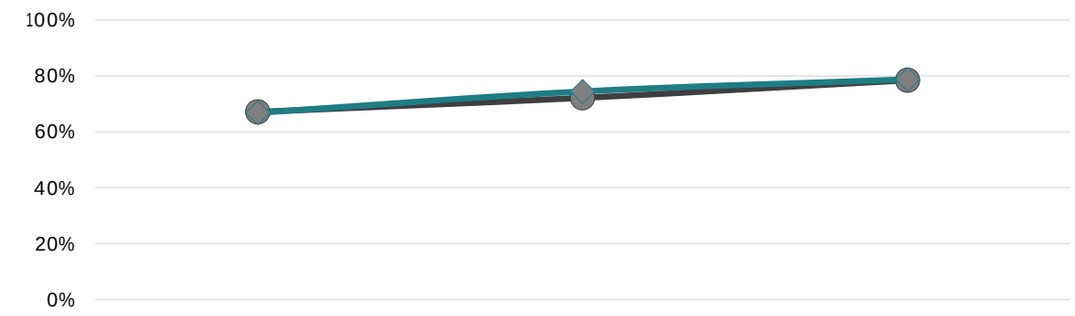
MALE



2.8% Change

419 Scores

22-23 Met + Exceeded	
3rd	45%
4th	42%
5th	47%
6th	37%
7th	42%
8th	35%
11th	38%



● ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
◆ MALE	67% ▼ -0.8%	74% ▲ 1.2%	79% ▲ 3.3%

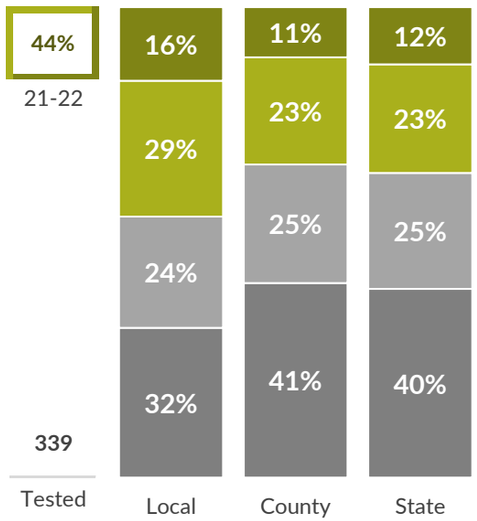
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

ENGLISH & LANGUAGE ARTS

ECONOMICALLY DISADVANTAGED (ECD)

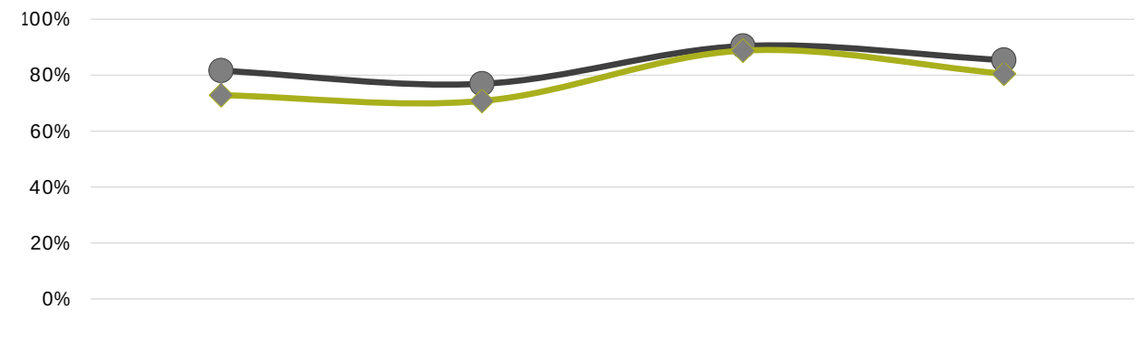


0.4%
Change
339
Scores

22-23 Met + Exceeded	
3rd	23%
4th	32%
5th	47%
6th	39%
7th	50%
8th	46%
11th	71%

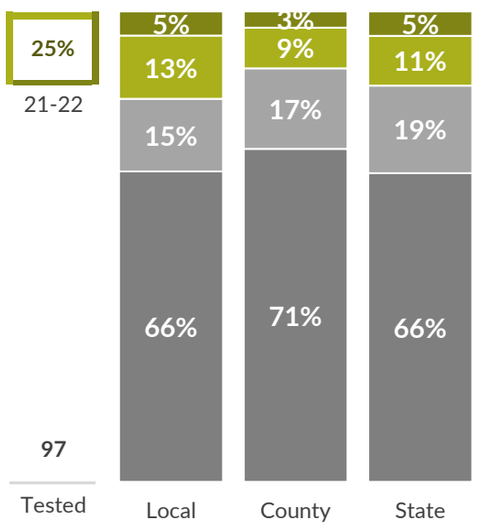
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above



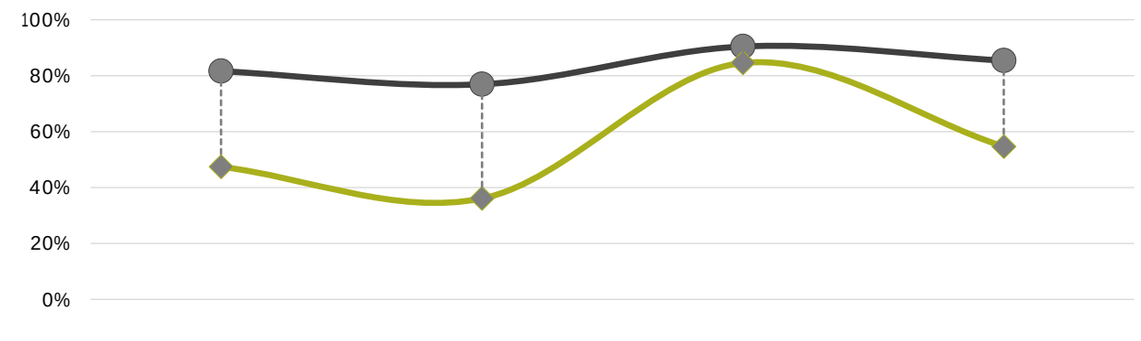
	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
ECD	73% ▼ -7.5%	71% ▼ -4.3%	89% ▲ 0.4%	81% ▲ 3.4%

STUDENTS WITH DISABILITIES (SWD)



-6.1%
Change
97
Scores

22-23 Met + Exceeded	
3rd	15%
4th	15%
5th	38%
6th	0%
7th	20%
8th	-
11th	-



	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
SWD	47% ▼ -22.4%	36% ▼ -10.5%	85% ▲ 10.6%	55% ▼ -2.9%

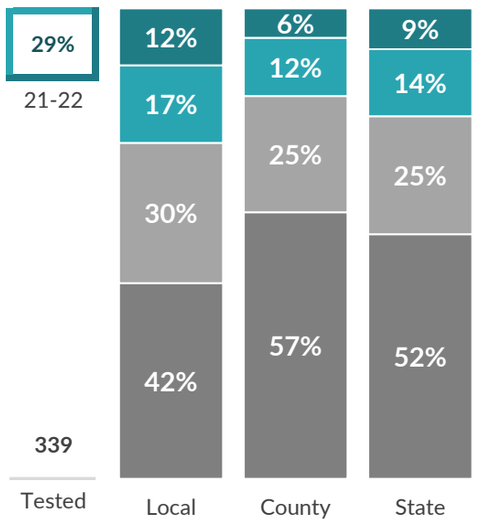
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

MATHEMATICS

ECONOMICALLY DISADVANTAGED (ECD)



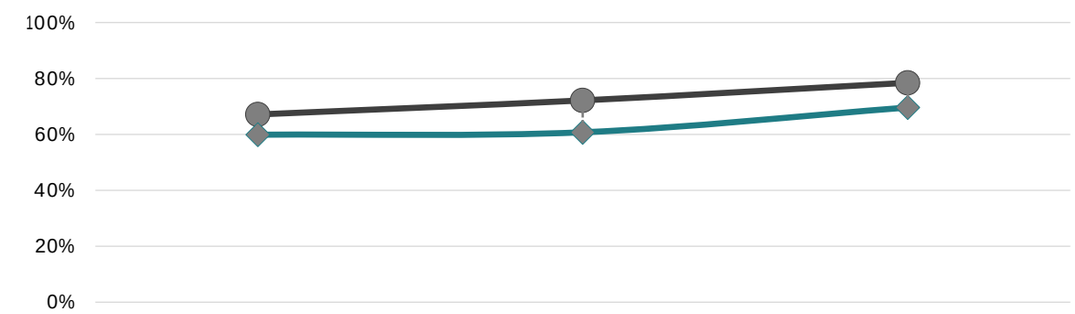
-0.3%
Change

339
Scores

22-23 Met + Exceeded	
3rd	20%
4th	34%
5th	31%
6th	33%
7th	30%
8th	17%
11th	36%

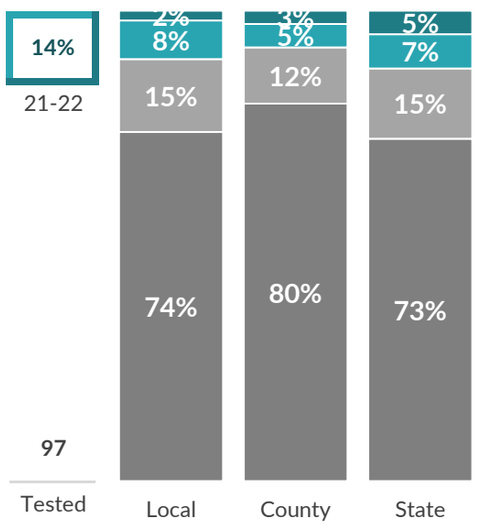
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above



	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
ECD	60% ▲ 1.7%	61% ▼ -6.4%	70% ▼ -1.8%

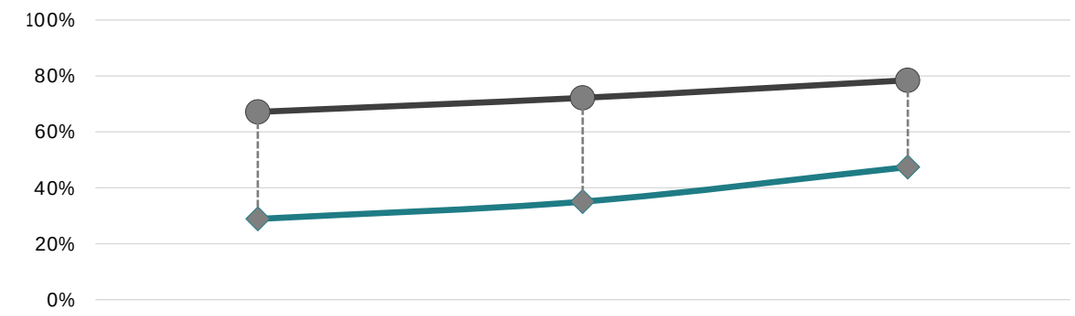
STUDENTS WITH DISABILITIES (SWD)



-3.4%
Change

97
Scores

22-23 Met + Exceeded	
3rd	15%
4th	8%
5th	19%
6th	0%
7th	20%
8th	-
11th	-



ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
SWD	29% ▼ -2.7%	35% ▼ -0.6%	47% ▼ -8.7%

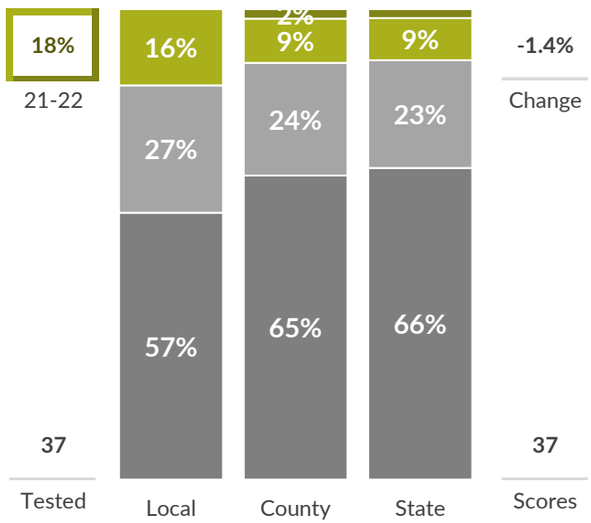
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

ENGLISH & LANGUAGE ARTS

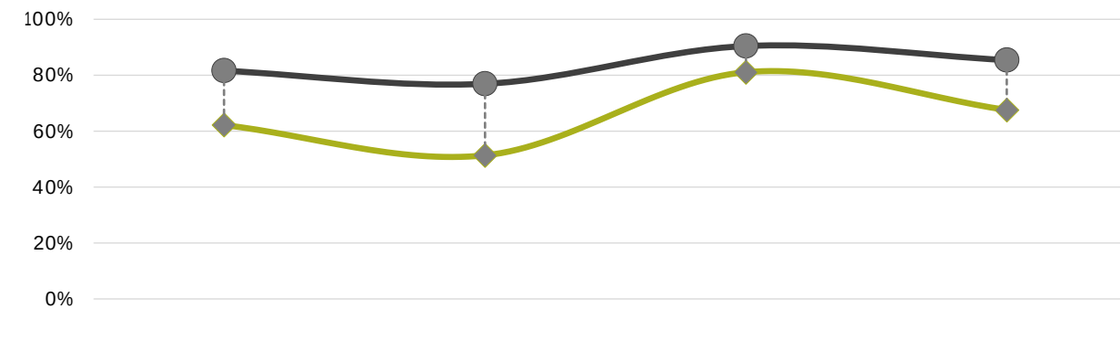
ENGLISH LEARNER (EL)



22-23 Met + Exceeded	
3rd	-
4th	9%
5th	-
6th	-
7th	-
8th	-
11th	-

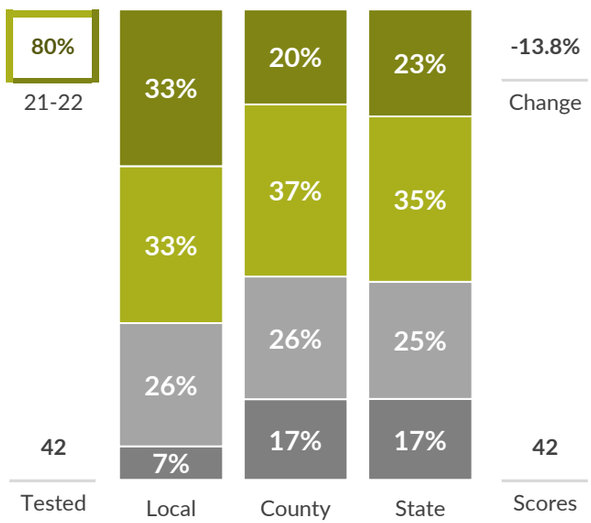
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

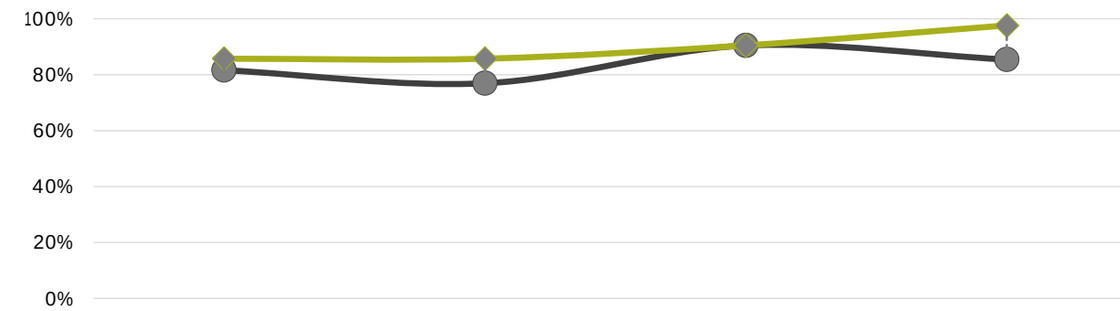


	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
EL	62% ▲ 0.4%	51% ▼ -16.3%	81% ▼ -10.1%	68% ▼ -3.0%

RECLASSIFIED FLUENT ENGLISH PROFICIENT (RFEP)



22-23 Met + Exceeded	
3rd	-
4th	-
5th	-
6th	-
7th	-
8th	-
11th	77%



	Reading	Writing	Listening	Research & Inquiry
ALL	82% ▼ -3.5%	77% ▼ -1.1%	90% ▲ 0.9%	85% ▲ 1.3%
RFEP	86% ▼ -9.9%	86% ▼ -5.6%	90% ▼ -7.4%	98% ▲ 2.0%

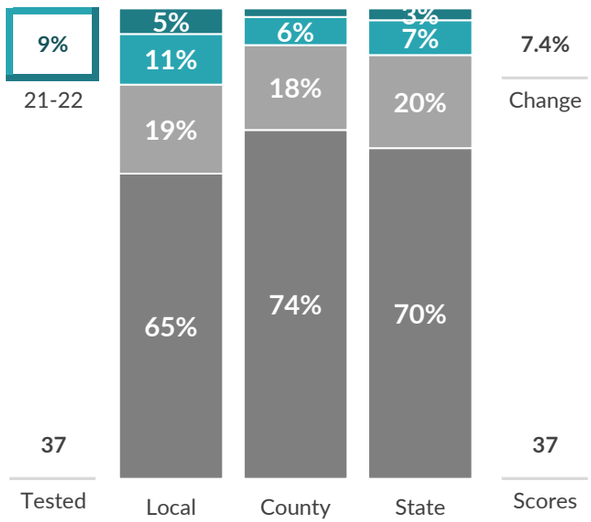
Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

STUDENT GROUP ANALYSIS

Apple Valley Unified Academy for Academic Excellence (San Bernardino)

MATHEMATICS

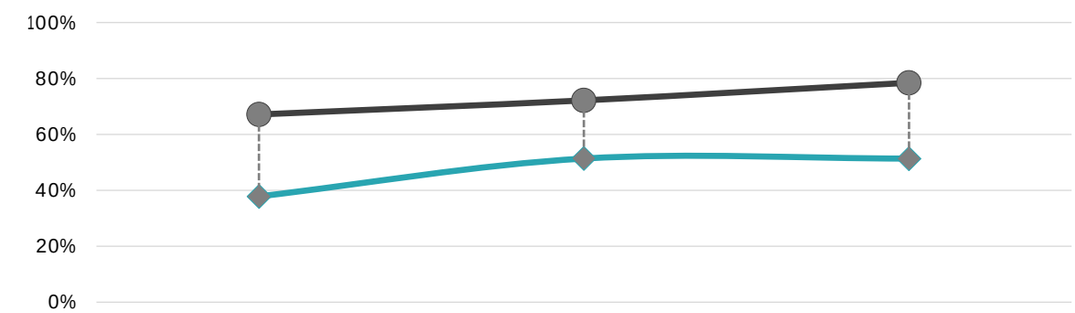
ENGLISH LEARNER (EL)



22-23 Met + Exceeded	
3rd	-
4th	18%
5th	-
6th	-
7th	-
8th	-
11th	-

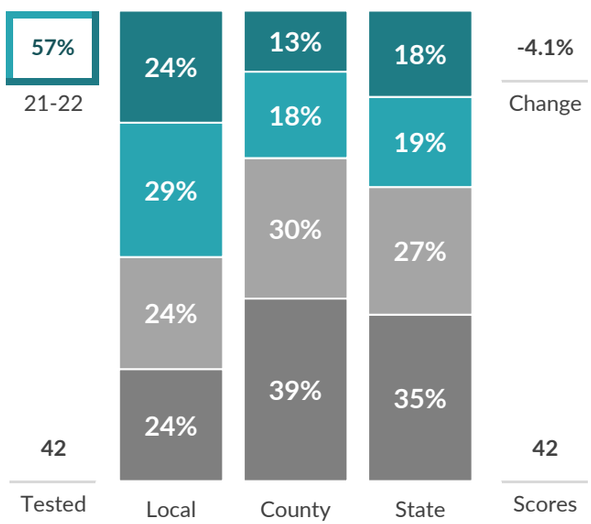
ACHIEVEMENT GAP ANALYSIS BY CLAIM AREA

22-23 % Near + Above

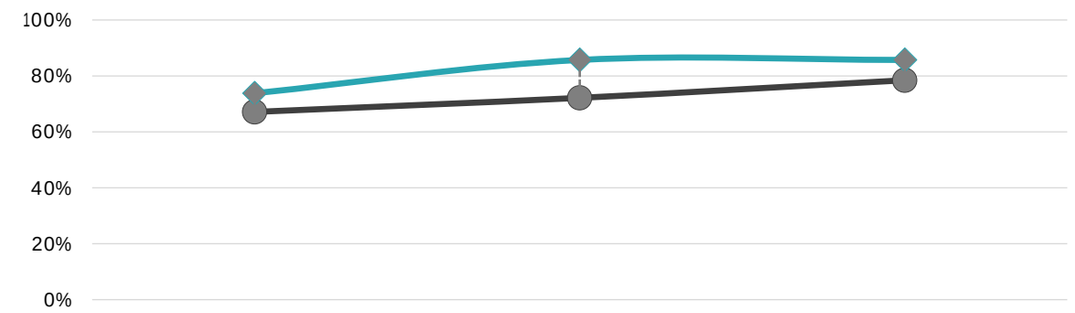


	Concepts & Procedures	Problem Solving and Modeling & Data Analysis	Communicating Reasoning
ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
EL	38% ▲ 2.6%	51% ▲ 1.4%	51% ▼ -10.4%

RECLASSIFIED FLUENT ENGLISH PROFICIENT (RFEP)



22-23 Met + Exceeded	
3rd	-
4th	-
5th	-
6th	-
7th	-
8th	-
11th	38%



ALL	67% ▲ 0.8%	72% ▲ 0.5%	78% ▲ 2.1%
RFEP	74% ▼ -0.1%	86% ▲ 5.3%	86% ▼ -1.2%

Note: Aggregate results are not available for groups of students where 10 or fewer students had tested.

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Unified School District

Minutes for Regular Meeting of the Lewis Center for Educational Research Board
August 19, 2024

1. **CALL TO ORDER AND PLEDGE OF ALLEGIANCE**: Chairman Caldwell called the meeting to order at 4:30 p.m.

2. **ROLL CALL**: LCER Board Members Pat Caldwell, Yolanda Carlos, Sharon Page, David Rib, Jessica Rodriguez, Marisol Sanchez and Pat Schlosser were in attendance. LCER Board Members Steve Levin and Omari Onyango were absent.

3. **PUBLIC COMMENTS**: None.

4. **SPECIAL PRESENTATIONS**:

.01 LCER Ambassadors Student Update - Ambassadors Mosiah Gonzalez and Ward Halwani updated the Board on AAE student activities, such as the girl's volleyball game on Thursday at 5:30 p.m. ASB is having their first pep rally 8/30 and are preparing for the fall festival and winter formal. ROTC is preparing for their unit evaluation on 10/23. Officer training school and leadership training school were held over summer. There will be a 9/11 ceremony at AAE. Ambassadors worked with the Taiwanese students over the summer, held a blood drive and are holding another blood drive on 8/28. Ambassadors also attend National Night Out at the Town of Apple Valley. Mock Trial is beginning with a new advisor this year. The National Honor Society will be holding their induction ceremony and band will be participating in upcoming parades. Ambassadors Corey Zaman and Korian Maldonado updated the Board on NSLA student activities. Chile Club is holding fundraisers, and ASB is hosting their first dance on 9/27. NSLA's first senior class had a senior sunrise the first day of school. NSLA will be playing AAE in volleyball on Thursday at 5:30 p.m. Ambassadors held the first NSLA blood drive and also participated with the Taiwanese students over the summer.

.02 AAE Principal Update – Vice Principal Varteni Krikorian updated the Board that Back to School night was very successful. We are working towards getting more parents involved. The Board is invited to the 9/11 ceremony at 8:45 in the gym. Admin has been discussing improving the dress code. New uniforms were ordered as loaners. We will be partnering with NSLA regarding Ethnic Studies. Attendance is a focus, as well as tardies. Lisa reported that we now are able to do attendance recovery as well, such as Saturday school. We are having students come in on Tuesdays and Thursdays to complete assignments and discuss their behavior, rather than be suspended at home for the day. This program has been successful. We have a new CTE computer science teacher and may be adding a video game design class as well. Pat C. asked if any parents have commented on students not having phones in class. They have seemed supportive and we have not heard any complaints. Lisa reported that the State has been putting this message out as well and we are following our Board policy.

.03 NSLA Principal Update – Erika Agosto reported that Back to School was very successful. A new mural was painted and everyone loves it. Orientations were held prior to school and student ID pictures were taken and information was updated. With a senior class, there are now student drivers on campus. Parents are happy about the increased communication and web calendar. Family Voices is popular and they will be discussing the LCAP, bullying, safety, curriculum, etc. Parsec Real is a new system that will be providing us a lot of feedback. There are several new teachers that have started and students are connecting with them. A new Athletic Director has started well and he is starting an elementary sports program. Erika thanked Chet for helping her connect new teachers with mentors. Amanda Casillas is the new VP for elementary. Ethnic Studies is a new graduation requirement starting in 2025-26. We are gathering input from our stakeholders. A new social emotional program, Navigate 360, is being implemented with pertinent lessons for their in-house suspension program. We will be staring the Saturday attendance recovery program as well.

.04 Follow up on Field Trip Funding Board Comment – Lisa Lamb reported that she met with the principals this month to develop an overview of field trip funding. Prior to COVID, most field trips

were funded by parent donations and PTO/PTC. After COVID, a large emphasis was placed on field trips by the State and funding was provided to support field trips without having to do as much fundraising. We have the following funding sources for field trips: PTO/PTC raised grade level and club funds, parent donations, outside donations and grants. The Lewis Center Foundation has also supported a couple field trips. Additionally, AAE has $30K designated out of general funds for TK-12 field trips and NSLA has $65K designated out of general funds. NSLA has more funds available due to their demographics. The 6th grade science camp ranges from $45 - $50K. By reference, a paraprofessional is $35K. There have been changes to our general funding we have to tie all of our resources to metrics with student learning outcomes. This year, NSLA's Pali Trip had been written into their ESSER III funding plan and we have to spend that funding by December. Obstacles we face for field trips include nursing care funding for students that have special medical needs, and labor laws for hourly employees that may get into double pay time. Our budgets are getting tighter and we are being conservative fiscal stewards. We also want to protect our supplemental services. We may not be able to sustain these trips in the long term. We value field trips, but regulations have encroached on us. Sharon reported that the report was eye opening that we would need to bring an hourly employee on trips as California doesn't have a mechanism for overnight employment. Pat C. asked Pat S. about AVUSD field trips and he echoed the constraints. Sometimes there are special funds that may be used, but those are limited as well. David Rib thanked Administration for the report and the funding sources. He also reported that Lucerne Valley has a foundation that specifically funds science camp.

5. <u>CONSENT AGENDA</u>:

.01 Approve Minutes of June 10, 2024 Regular Meeting
.02 Approve NSLA Chile Club Field Trip to Chile October 2-9, 2024
.03 Approve NSLA 8th Grade Field Trip to Pali Institute October 28-30, 2024
.04 Approve AAE ASB and Club Spending Plans
.05 Approve NSLA Comprehensive Support and Improvement (CSI) Funding Plan

Items .02 and .04 were pulled by Pat Schlosser. On a motion by David Rib, seconded by Pat Schlosser, vote 7-0, the LCER Board approved Consent Agenda Items .01, .03 and .05 by roll call vote.

Item .02 - Lisa Lamb wanted to bring it to the attention of the Board that the chaperones for this field trip are all female. The students will be lodging with host families, so male chaperones are not needed for lodging purposes. We have a strong partnership with the school there and there will be male/female staff on excursions. Pat S. asked if our insurance would have any issues that. Lisa reported that it is not a requirement. The host families will take the students to/from school, provide breakfast, and coordinate events. The host families are vetted by the school. The families will connect with each other prior to the trip. The chaperones are available at any time if needed. David Rib asked about the funding designated in the Foundation. The designated funds are from a major donor and fundraising. The Chilean students were hosted here last year and know the students that are going there this year. On a motion by Yolanda Carlos, seconded by Marisol Sanchez, vote 7-0, the LCER Board approved Consent Agenda Item .02 by roll call vote.

Item .04 - Pat S. wanted to clarify that it should read $14K on the Board Cover sheet. On a motion by Pat Schlosser, seconded by Jessica Rodriguez, vote 7-0, the LCER Board approved Consent Agenda Item .04 by roll call vote with the correction on the cover sheet.

6. <u>DISCUSSION/ACTION ITEMS</u>

.01 Approve LCER Strategic Plan 2024-2029 – Lisa Lamb noted that the Board report ties directly to the goals and objectives in the Strategic Plan. The goals and objectives were reviewed for content. Yolanda brought up a survey that the Exec Team will review. Pat C. asked to add tardies and Saturday school statistics. Pat C. asked for this item to be tabled to the next meeting to be sure all

goals and objectives in the Strategic Plan match the Board Report. Lisa will work on these revisions and bring the Strategic Plan back to Board at the next meeting as a Consent Agenda Item.

.02 Approve Request for approval of Kayleen Ascenath Malcolm to serve as a Full-time Elementary Teacher (Kindergarten) for the Academy for Academic Excellence during the 2024/2025 school year on a Multiple Subject Provisional Internship Permit (PIP) – Stacy Newman reported that Kayleen was our Transitional Life Skills coordinator, and has finished her degree. On a motion by Sharon Page, seconded by Yolanda Carlos, vote 7-0, the LCER Board approved Kayleen Ascenath Malcolm to serve as a Full-time Elementary Teacher (Kindergarten) for the Academy for Academic Excellence during the 2024/2025 school year on a Multiple Subject Provisional Internship Permit (PIP) by roll call vote.

.03 Nominating Committee – Pat Caldwell reported that our Bylaws allow us to have between 5-9 Board members. The suggestion is to fill 2 open spots in December and 2 at a later time, such as the following year. This will allow the terms to more staggered, and not have 4 terms come up at the same time again. Sharon reported that this makes sense. David Rib has a verbal commitment for someone to apply from Mitsubishi. The Board agreed to fill only 2 LCER Board positions for 2025.

.04 Lewis Center Foundation Board Update – Marisol Sanchez reported that the Foundation has been working on the gala. We currently have $9,300 secured in sponsorships, and the goal is $15K. Please buy raffle tickets if you can't attend.

7. <u>INFORMATION INCLUDED IN PACKET</u>:

.01 President/CEO Report

.02 Grant Tracking Report

.03 LCER Financial Reports

- Checks Over $10K
- Budget Comparisons
- Lewis Center Foundation Financial Reports
- NSLA and AAE Federal Cash Management Data Reports

.04 LCER Board Attendance Log

.05 LCER Board/Lewis Center Foundation Give and Get

8. <u>BOARD/STAFF COMMENTS</u>:

.01 Ask a question for clarification

.02 Make a brief announcement or a brief report on his or her own activities - Pat S. reported that the CSI plan should be added into the LCAP and reposted. We are working with the County and will get it reposted.

.03 Future agenda items

9. <u>ADJOURNMENT:</u> Chairman Caldwell adjourned the meeting at 6.07 p.m.

Lewis Center for Educational Research Board
Agenda Item Cover Sheet

Date of meeting: 9-16-24

Title: USS IOWA Filed Trip (Overnight Stay)

Presentation:_____ Consent:__x___ Action:_____ Discussion:_____ Information:_____

Background: Cadets will be visiting the USS IOWA Battleship in San Pedro. They will be having a battleship tour to learn about the history of the USS IOWA.

Fiscal Implications (if any): n/a

Impact on Mission, Vision or Goals (if any): n/a

Recommendation: Please review the itinerary and objective of the field trip.

Submitted by: MSgt Padua

LEWIS CENTER FOR EDUCATIONAL RESEARCH
FIELD TRIP REQUEST FORM

Office Use Only
Date/Time Submitted:
Initials:
Transportation Booked:
Initials:
Calendared:
Initials:

Date Submitted: 8/15/24

Requested by: MSGT PADUA

Phone: 9518504715

Overnight, Out of State or Water Activities? ☒ Yes ☐ No → If yes, Board Approval is Required 3 months prior to the trip. Submit This Form with a Board Cover Sheet and Itinerary or List of Activities*

Date(s) of Trip: 1/25/25

Destination: USS IOWA

Number of: Students 40 Staff ~~2~~ 3 Adult

Grade Level(s): 9-12

Estimated Number of Volunteers** 3

School Departure Time: 1400

Destination Arrival Time: 1630

Destination Departure Time: 1/26/25 1030

School Return Time: 1230

Specific Learning Objectives of Trip: TOUR USS IOWA AND TO LEARN HISTORY AND MISSION OF NAVY OPERATIONS.

Funding Source (check all that apply)

☐ ASB/Club Funds Name of Club:
☐ Grade Level Funds What Grade Level:
☐ Fundraising/Donations
☐ Budget Code: SFJROTC

Transportation (check all that apply)

☐ Private Vehicle*** ☐ Public Transportation ☐ Plane ☐ Train ☐ Boat ☐ Other: EBMEYER

☒ Bus Number of buses 1 If bus, Student Activities Coordinator has been informed bus is needed ☐

Lodging (check all that apply)

☐ On Campus ☐ Hotel ☐ AirBnB ☐ Other: USS IOWA BATTLESHIP

I have followed the Checklist and read BP and AR 6153 prior to submitting this form: [signature]
Requestor Signature

Approved? ☐ Yes ☐ No [signature] Date: 8-21-24
Principal Signature

* *Itinerary or List of Activities must be attached if overnight, out of state or water activities*
** *Non-staff chaperones must be approved volunteers*
*** *Drivers must be on the Approved Drivers List and Complete an Off Site Event Form*

Updated 1/16/24

USS IOWA ITINERARY / ACTIVITIES

1/25/25 (SATURDAY)
ARRIVE AAE CIRCLE: 1330
DEPART AAE: 1400
ARRIVE USS IOWA: 1630

SAFETY INBRIEF
BUNK ASSIGNMENT
TOUR USS IOWA
DINNER
HYGIENE
LIGHTS OUT

1/26/25 (SUNDAY)
HYGIENE
BREAKFAST
PACK UP BAGS
GIFT SHOP VISIT

DEPART USS IOWA: 1030
ARRIVE AAE CIRCLE: 1230

Lewis Center for Educational Research Board
Agenda Item Cover Sheet

Date of meeting: 9-16-24

Title: LEADERSHIP CAMP SY24-25 (Overnight Stay) March 24 – 28, 2025

Presentation:_____ Consent:__x___ Action:_____ Discussion:_____ Information:_____

Background: Cadets will be attending leadership camp OPERATION ZENITH at Fawnskin (Big Bear) to develop teamwork building and leadership training.

Fiscal Implications (if any): n/a

Impact on Mission, Vision or Goals (if any): n/a

Recommendation: Please review the itinerary and objective of the field trip.

Submitted by: MSgt Padua

Office Use Only
Date/Time Submitted:
Initials:
Transportation Booked:
Initials:
Calendared:
Initials:

LEWIS CENTER FOR EDUCATIONAL RESEARCH
FIELD TRIP REQUEST FORM

Date Submitted: 8/15/24

Requested by: MISAT PAHUJA

Phone: 9518504715

Overnight, Out of State or Water Activities? [X] Yes [ ] No → If yes, Board Approval is Required 3 months prior to the trip. Submit This Form with a Board Cover Sheet and Itinerary or List of Activities*

Date(s) of Trip: 3-24-25 / 3-28-25

Destination: FAWNSKIN (BIG BEAR)

Number of: Students 100 Staff 5

Grade Level(s): 9-12

Estimated Number of Volunteers** 15

School Departure Time: 0830

Destination Arrival Time: 1030

Destination Departure Time: 1130

School Return Time: 1330

Specific Learning Objectives of Trip: DEVELOPING TEAMWORK AND ADVANCED LEADERSHIP TRAINING.

Funding Source (check all that apply)

[ ] ASB/Club Funds — Name of Club: _____

[ ] Grade Level Funds — What Grade Level: _____

[ ] Fundraising/Donations

[ ] Budget Code: SFJROTC

Transportation (check all that apply)

[ ] Private Vehicle*** [ ] Public Transportation [ ] Plane [ ] Train [ ] Boat [ ] Other: EBMEYER

[ ] Bus Number of buses _____ If bus, Student Activities Coordinator has been informed bus is needed [ ]

Lodging (check all that apply)

[ ] On Campus [ ] Hotel [ ] AirBnB [X] Other: YMCA CAMP WHITTLE

I have followed the Checklist and read BP and AR 6153 prior to submitting this form: _____ Requestor Signature

Approved? [ ] Yes [ ] No _____ Principal Signature Date: 8-27-24

* *Itinerary or List of Activities must be attached if overnight, out of state or water activities*

** *Non-staff chaperones must be approved volunteers*

*** *Drivers must be on the Approved Drivers List and Complete an Off Site Event Form*

Updated 1/16/24

LEADERSHIP CAMP (FAWNSKIN) ITINERARY / ACTIVITIES

3/24/25 (MONDAY)	3/25/25 (TUESDAY)	3/26/25 (WEDNESDAY)	3/27/25 (THURSDAY)	3/28/25 (FRIDAY)
ARRIVE AAE CIRCLE: 0430 DEPART AAE: 0830 ARRIVE FAWNSKIN: 1000 CHECK IN CABINS LUNCH BRIEFINGS INSPECTIONS DINNER HYGIENE LIGHTS OUT	HYGIENE PHYSICAL TRAINING BREAKFAST BRIEFINGS DRILL PRACTICE TEAMWORK BUILDING EXERCISE LUNCH BRIEFINGS DINNER HYGIENE LIGHTS OUT	HYGIENE PHYSICAL TRAINING BREAKFAST BRIEFINGS DRILL PRACTICE TEAMWORK BUILDING EXERCISE LUNCH BRIEFINGS DINNER HYGIENE LIGHTS OUT	HYGIENE PHYSICAL TRAINING BREAKFAST BRIEFINGS DRILL PRACTICE TEAMWORK BUILDING EXERCISE LUNCH BRIEFINGS DINNER HYGIENE LIGHTS OUT	HYGIENE BREAKFAST GRADUATION PACK UP BAGS DEPART FAWNKSIN: 1200 ARRIVE AAE CIRCLE: 1330

LEWIS CENTER FOR EDUCATIONAL RESEARCH

STRATEGIC PLAN
July 1, 2024 – June 30, 2029

The plan for our future

Adopted

September 16, 2024

Lewis Center for Educational Research
STRATEGIC PLAN

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Lewis Center for Educational Research
STRATEGIC PLAN
The plan for our future

Introduction: Our Plan

Our plan charts a course that is bold yet attainable. Our vision calls for the Lewis Center and its schools to be nationally recognized as successful role models for others wishing to provide relevant education and unlimited opportunity to those they serve – as we do. The plan lays out how we, an operator of two uniquely different charter schools serving two distinctly different demographics, will align our efforts over the next years to achieve the goals our students, parents and communities have a right to expect and enjoy.

We recognize our responsibility and the leadership we have been entrusted to provide. We also recognize the value and impact of what becoming a model institution of our kind can mean. The stakes are high, but so is the opportunity when our vision is achieved.

MISSION
Why we exist

The mission of the Lewis Center for Educational Research is to ensure student success in a global society through data driven and research-based schools and programs that are safe, innovative and culturally inclusive.

VISION
What we want to be known for

The Lewis Center for Educational Research, along with its award-winning TK-12 charter schools, is internationally recognized as a leader in education due in part to its unique, long-term partnership with NASA/JPL. The Lewis Center and its schools are model programs for STEM and World Languages.

The Lewis Center is deeply involved in serving its two communities — the High Desert and San Bernardino, as well as the greater educational community — through its local and global programs.

The Lewis Center's excellent reputation can be attributed to its highly qualified, enthusiastic staff who — with the support of engaged parents, Board members and community partners — ensure students achieve at the highest academic levels.

VALUES

Ethical priorities to guide our decision-making and our treatment of one another

Integrity: We strive to engender trust in our intentions and abilities by acting courageously and adhering to a strong moral compass.

Excellence: We aspire to excellence through supporting our community of learners in the practice of continuous innovation, collaboration and growth.

Leadership: Being forerunners, pace-setters and cultivators, we demonstrate strong leadership rooted in principles of integrity, accountability, respect, and communication.

Inclusiveness: We will leverage our diverse and inclusive community to achieve superior results in the field of education.

Lewis Center for Educational Research
STRATEGIC PLAN

GOALS
Goals to achieve our vision
(Updated Annually)

Student Success

Goal 1: Enhance all school programs and enrichment opportunities at both schools to promote student success in academics, behavior, and social-emotional wellness.~~Strengthen all school programs and enrichment opportunities at both schools resulting in student success in the areas of academic, behavioral, and social emotional wellness.~~

Business/Fiscal

Goal 2: Ensure fiscal stability and pursue diverse external funding sources to support innovation.~~Maintain fiscal stability and seek diversified outside funding that allows us to be innovative.~~

Staffing

Goal 3: Provide support and onboarding for new and incoming staff, enhance staff performance, and align observations with desired student outcomes.~~Supporting and onboarding new and incoming staff; staff performance; targeted correlation of observation to student outcomes; "look fors"; allocating staff release time to support new teachers.~~

Organizational Effectiveness

Goal 4: Enhance the Lewis Center's brand development and marketing by expanding outreach, education, communication, and targeting a more diverse audience.~~Brand and marketing of brand: outreach, educating, communicating, targeting more diverse audience.~~

Lewis Center for Educational Research
STRATEGIC PLAN

OBJECTIVES
The outcomes we expect

Student Success

Goal 1: Enhance all school programs and enrichment opportunities at both schools to promote student success in academics, behavior, and social-emotional wellness.~~Strengthen all school programs and enrichment at both schools resulting in measuring, communicating and celebrating student success by sub groups in the areas of academic, behavioral and social emotional wellness.~~

1.1 Objective: Academic – Demonstrate academic progress as measured by the California Dashboard, site-~~-~~level assessments, and verifiable data.
Strategy: Through School Administrative Meetings (SAM), TK-12 Professional Learning Communities (PLC) will continually analyze multiple measures of student mastery to inform instructional decision making. (i.e. CAASPP, LAS Links, iReady, AP, etc.)

1.2 Objective: Behavior – Demonstrate behavioral improvement as measured by system reporting (i.e. Infinite Campus, California Dashboard, Average Daily Attendance (ADA), etc.)
Strategy: Decrease absenteeism as compared to prior year through initiatives such as incentives, School Attendance Review Team (SART), s~~S~~aturday s~~S~~chool/("What I Need")WIN, short-~~-~~term i~~I~~ndependent s~~S~~tudy and increased parent communication.
Strategy: Decrease Academic Learning Center (ALC), suspensions, and expulsions as compared to prior year through PLC-~~-~~driven student supports based on data (Parsec REAL, Infinite Campus, etc.)

1.3 Objective: Behavioral and social emotional wellness – Demonstrate SEL progress as measured through multiple individual and group measures, counseling statistics, mental health referrals, etc. (i.e. Infinite Campus, Parsec REAL, etc.)
Strategy: Implement Capturing Kids Hearts, a program focused on SEL and building relationships.
Strategy: Administer student c~~C~~limate s~~S~~urvey and analyze results through PLCs.
Strategy: Schools will provide direct services and ongoing socio-emotional supports through LCER's full-time school counselors and school psychologists, including clinicians from the Desert Mountain Children's Center (DMCC) and the San Bernardino County Superintendent of Schools (SBCSS).

1.4 Objective: Increase communication and celebrations of success.
Strategy: Highlighting staff and student achievements at Board meetings.
Strategy: Plan student celebrations at the site-~~-~~level that encourage~~s~~ family participation.

Strategy: Highlight staff and student achievements with community partners through channels such as the LCER Post, social media, website, press releases, Foundation events, etc.

Business/Fiscal

Goal 2: Ensure fiscal stability and pursue diverse external funding sources to support innovation.~~Maintain fiscal stability and see diversified funding in light of funding instabilities that allows us to be innovative.~~

2.1 Objective: Expenditures will be aligned with LCAP goals and designated fund plans required by CDE/US Department of Education using restricted dollars first.
Strategy: Finance has implemented a new accounting code in the account structure to support proper tracking and identification of expenses in relation to the LCAP. The LCAP process will include community partner engagement via PLCs, School Site Council, English Language Advisory Council, Family Voices/Town Halls, Academic Leadership Teams, etc.
Strategy: Principals and budget managers will ensure that resources are allocated and spent according to the adopted LCAP.
Strategy: Budget Managers, Coordinators, and Finance staff will utilize LCAP and ~~a shared document~~the budget encumberance report to track all restricted ~~fund plans~~and general ~~and~~ expenditures. This ~~document~~ report will ~~track~~ provide up-to-date activity for all ~~restrictive~~ dollars, the total amount of each designated fund. The budget managers will work with Finance and the Coordinator of Programs and Assessments to ensure that ~~,~~ allowable and planned expenses, ~~and~~ reporting requirements, and timelines are met.

2.2 Objective: Identify and seek new funding opportunities to support student learning and enrichment outcomes.
Strategy: The Finance Department will monitor funding opportunities as information is released from the State and Federal government and apply for those that meet LCAP goals and ~~student~~ LCER needs.
~~Stragegy~~Strategy: LCER staff will apply for grants to support student learning and enrichment outcomes.

2.3 Objective: The Foundation Board will raise funds annually to support the identified needs of LCER schools and programs.
Strategy: The Foundation will continue to host the annual gala to raise funds for identified needs.
Strategy: The Foundation will host an additional event each year that will cultivate our community partner/donors and raise additional funds.
Strategy: Foundation Board members will work to cultivate donors throughout our communities by attending local events and promoting the Lewis Center.

Strategy: Community partners will receive regular updates on Foundation-supported activities to build awareness and increase support for future fundraising efforts through ongoing public relations and outreach efforts.
Strategy: Recruit additional Foundation Board Members to assist in these fund development efforts.

Staffing

Goal 3: Provide support and onboarding for new and incoming staff, enhance staff performance, and align observations with desired student outcomes.~~Supporting and onboarding new and incoming staff; staff performance; targeted correlation of observation to student outcomes; "look fors"; allocating staff release time to support new teachers.~~

3.1 Objective: Provide and monitor intentional and targeted support for new and experienced incoming staff. Some targeted support systems will include induction, professional development, mentoring, Capturing Kids Hearts, etc.
3.2 Objective: Both school a~~A~~dministration teams will conduct regular classroom walk throughs. Walk through data will be monitored by all levels of the professional learning community.
Strategy: Professional Learning Community (PLC) teams will measure the effectiveness of instructional strategies by their impact on student learning outcomes. This data will be shared with a~~A~~dministration and teaching teams regularly to guide implementation.
3.3 Objective: Decrease staff vacancies at NSLA as compared to the prior year.

Organizational Effectiveness

Goal 4: Enhance the Lewis Center's brand development and marketing by expanding outreach, education, communication, and targeting a more diverse audience.

~~Brand and marketing of brand: outreach, educating, communicating, targeting more diverse audience.~~

4.1 Objective: Board and Executive Team will actively communicate LCER's mission to the community partners that we serve.
Strategy: Implement Parsec Real (a software designed to enable staff to collect feedback with actionable insights) to improve community partner engagement at both schools.
Strategy: Each director will be engaged in key organizations within their area of expertise and will continue to seek opportunities to network, lead, and present.

Strategy: Under the direction of the LCER Public Information Officer, marketing and branding will increase through social media, print media, conference and community participation, and diversified recruitment efforts.
Strategy: Communicate with parents of the school sites through School Site Councils, Parents and Pastries/Cafecito, Parent/Teacher Groups, English Learner Advisory Councils, Principal's Cabinets, school events, and ongoing communication to ensure that our reputation is strong (with the goal to measure increased attendance at these events or committees).
Strategy: Executive Team and LCER Support Staff will maintain an active presence on both campuses.

4.2 Objective: Increase ongoing communication with LCER stakeholders as evidenced by staff, parent and student satisfaction on annual surveys.
Strategy: Give progress updates at All Staff Meetings.
Strategy: Hold LCAP meetings and Family Voices/Town Halls to report annual progress toward goals and seek feedback for new goals and needs.
Strategy: Add virtual attendance options to meetings whenever feasible to increase engagement and attendance.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX A

Historical Background of Strategic Plan

The Lewis Center for Educational Research (LCER) is in a transitional period in its life cycle. With the retirement of our charismatic, visionary founder, the Board of Directors and Executive Team determined that we are facing a challenging future. To plan for that future, and to assure that it is the future we want it to be, we decided to engage in strategic planning. Board members and senior administrators became the planning team. This team convened several times over a two-month period in the spring of 2016, and spent many hours examining issues and concerns, and to share thoughts, ideas and suggestions on the future of LCER and its two charter schools. The results of those sessions are contained in this strategic plan.

Process

In order to address immediate concerns, the planning team first held a five hour "strategic issues" session. Administrative staff presented update reports on issues identified at an earlier board retreat held in November, 2015. Staff asked for and received direction from the Board on most of these issues which are presented in Appendix B.

The strategic issues session was followed by a full day planning meeting. During the morning session, discussion continued on issues where, due to time constraints at the earlier meeting, direction was still desired by staff. The results of these discussions are presented in Appendix C. Meeting minutes from 2017 are presented in Appendix D, meeting minutes from 2018 are presented in Appendix D and meeting minutes from 2019 are presented in Appendix F.

The afternoon session was devoted to reviewing and modifying the LCER mission statement, developing a set of values, and completing a S.W.O.T. analysis. Statements to accompany the values were developed by a small volunteer task force who met a few days later. Those values and value statements are included in the body of the plan. The 2016 S.W.O.T. analysis is presented in Appendix G, the 2017 S.W.O.T. analysis is presented in Appendix H, the 2018 S.W.O.T. analysis is presented in Appendix I and the 2019 S.W.O.T. analysis is presented in Appendix J.

The third session was devoted to determining any remaining critical issues and developing strategic goals and objectives. Additionally, strategies for strategic management were discussed and responsibilities for developing and implementing action plans were assigned.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX B

Summary of Issues Discussed at February 25, 2016 Session
(More Detail in Board Minutes)

Issues	**Board's Concerns/Direction**
Finances	1. Policies and procedures need revision. 2. Some new policies and procedures need to be written. 3. Restructuring of debt need to be completed. 4. Tetra contract should be reviewed by legal counsel. 5. Concern that staff is not on top of these issues
Staffing	1. Grant writer position/person needs review. 2. Do we need a PR/Community relations position? Can we afford it? 3. Consulting contracts/position/expenditures need review. 4. Concern that staff is not on top of these issues
Parity	1. What is the cost of offering step or stipend for hard-to-fill positions such as BCLAD. Can we afford it? Stacy was given direction to cost out this option. 2. Stacy was also given direction to cost out other options such as help with repaying student loans, improving leave and benefit package, absorbing health care cost increases, adding additional years to the salary schedule. Stacy to report costs with recommendations to Finance Committee. Finance Committee to bring recommendations to the full Board. 3. Recruiting teachers is difficult due to salary schedule. Board member suggestion: what if we offered to pay for the last year or two of college in exchange for a multi-year commitment to LCER?
Revenues opportunities	1. Board directed staff to pursue offering one TK class at each school starting fall 2016. 2. Board agreed with staff recommendation to try to fill grade levels, thus increasing ADA. 3. Staff floated several other ideas for increasing revenues. The three that the Board seemed most interested in were cell tower, selling surplus land, and fundraising.

Norton

1. Difficulty in filling upper grades because students must be bilingual and biliterate. Enrollment in upper grades will increase as students in lower grades move up.
2. Low test scores – student must answer questions by writing in English – no exceptions for English learners. No similar schools to use for comparison in California.
This is a concern for charter renewal.
3. Lease – needs to be renegotiated. Who is responsible? Current lease requires LCER to provide facilities for Head Start – current requirement for a new parking lot.
4. Relocation/expansion – CSUSB not an option. Could expand on current property. Could apply for Prop 39 and/or SB 740 funds. Who's responsible?

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX C

Summary of Issues Discussed at February 29, 2016 Session
(More Detail in Board Minutes)

Issue	Board's Concerns/Direction
Use of Thunderbird	1. Board straw vote provided direction to Gordon to pursue after-school, joint program with AVUSD; keep Board informed of progress. 2. Board expressed desire to explore option of selling TBC building, but only with consideration for improvements made by LCER. Can we sell if we don't own the land? Do we need AVUSD's approval to sell? Who's responsible for doing this?
Norton	1. Board decided to have charter renewed as a TK-12 school; strengthen TK-8 program while high school being developed; explore alternative models for high school; to be implemented by next charter renewal; bring plan and timeline for implementation with cost analysis for both the high school and the planning effort to the Board; put timeline in the current charter renewal application; should someone be hired to lead the planning effort? 2. Board agreed NSAA's name needs to be changed to reflect what is actually happening. The School Board committee, staff and parents should discuss and recommend name change to the full Board. Some suggested name changes included: • Norton Language and Science Academy • Norton Science and Language Academy • Norton Academy • Norton Academy for Academic Excellence 3. Should Norton have an English Only strand for 5-8? NSAA School Board committee and staff should bring recommendation to the full Board along with implementation plan and cost analysis if recommendation is "yes."

Organizational issues

Should LCER change its name?	Board consensus was to keep the LCER name. Some of the reasons given were: • Too costly to rebrand • The community knows us as LCER; to change the name would confuse the community. • The name gives us a priority (research), and we should develop more university partnerships to do research. (Who is responsible?) • The name reflects our desire to try new things, innovate
Should there be more emphasis on fundraising?	Board consensus was "yes," and to explore the option of pulling the Fundraising Committee from the Board and make it a separate fundraising foundation. Who will be responsible for this?

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX D

Special Meeting of the
Lewis Center for Educational Research Board of Directors

Minutes
September 11, 2017

1.0 Call to Order

Chairman Bud Biggs called the meeting to order at 12:10 .m.

2.0 Roll Call

LCER Board Members Bud Biggs, Buck Goodspeed, Kirt Mahlum, Kevin Porter, Russell Stringham, Peter Torres, Marcia Vargas and Rick Wolf were present.

LCER Board Members Duberly Beck, Andy Jaramillo, Jose Palafox and Regina Weatherspoon-Bell were absent.

Staff members Valli Andreasen, Fausto Barragan, Ryan Dorcey, Teresa Dowd, Jim Foley, Wes Kanawyer, Lisa Lamb, Stacy Newman, Toni Preciado, Jim Quinn and Paul Rosell were also present.

3.0 Public Comments: None

4.0 Discussion/Action Items on Strategic Planning
.01 Consultant Pat Caldwell Reviewed/Updated LCER Strategic Plan Mission, Vision and Values with the Board and staff.

- Mission: It was discussed and confirmed that we are using data driven and research proven practices at both schools, and the LCER is improving in this area. It was confirmed that we are innovative by using technology at both schools and seek opportunities that prepare our students. It was suggested to interview and get feedback on how we're doing from our graduates (college, trade, business, military), and from our teachers and parents as well. We feel the need to be innovative moving forward - being innovative is what makes us different. We need to balance innovation with legislation/day to day duties. Do we have a

safe and inclusive culture? At NSLA the location, facilities and traffic flow are unsafe, and traffic will increase with the additional warehouses. Upset parents are unsafe to the campus. Lisa noted that surveys show a positive response for safe campuses. Buck asked if safety should be moved up within the mission statement. At AAE outdoor facilities pose a safety hazard. Students feel safe per the student advisory council. It was asked if there is there diversity on the AAE student advisory council and if AAE has a real or perceived issue with diversity. We need to seek advice on how to increase diversity within the boundaries of a lottery enrollment. The Board needs diversity also.

- Vision: Are we exceeding needs? We are not "meeting" CAASP, let alone exceeding. What we're doing needs to be known. We need to tell our story and we need someone to tell it. Paul discussed how special ed students are included. We need to come up with a definition of "a focus on science". We are leading the way in NGSS. Kevin noted we need more science emphasis at both schools. GAVRT doesn't touch our students. A dual immersion high school at NSLA was discussed. Is it a reality fiscally? Marcia feels it is possible. It should definitely be a language focus high school - teaching through the language. Paul asked if the goal is innovation or to prepare students for a global society. We will keep dual immersion high school in the vision. The Board can modify the strategic plan anytime. Marcia noted the need to develop a task force to decide secondary plans for NSLA. Community engagement can be better.
- Values: Last year our focus wasn't innovation. We can now move forward with it as a focus. Kevin felt things were handled in an excellent manner and we have had tremendous collaboration and growth. Lisa thanked Pat and Board for staying focused on plan over the last year.

.02 Consultant Pat Caldwell reviewed/updated LCER Strategic Plan strengths, weaknesses, opportunities and threats with Board and staff, and will incorporate them in the updated LCER Strategic Plan.

.03 Consultant Pat Caldwell reviewed/updated LCER Strategic Plan Existing Goals and Objectives. The goals are our highest priorities. Lisa Lamb provided an update on accomplishments towards the current goals.

Goal 1: "Improve the financial condition of the LCER, including key provisions for sustainability" - we are still working on this goal. Under Objective 1.2 – the budget needs to be more understandable for Board and staff. The date to accomplish this by was updated to December 2017. Kevin would like us to be proactive in looking at figures. Under Objective 1.3 - a 3% reserve is standard. The objective to have no less than two months of total payroll and costs in reserves is over and above the 3%.

Goal 2: "Renew Norton's charter in December 2016 and continually strengthen the academic program" – the charter was renewed and we are in lease negotiations with the City and County of San Bernardino regarding the campus. We need to determine our final option and our budget. Lisa has been able to tell NSLA's story to many during this process.

Goal 3: "The Lewis Center for Educational Research will be unified under a common vision, mission, goals and objectives" – we are still working on trust and transparency and will review the objectives.

.04 Consultant Pat Caldwell lead a discussion on identifying any new critical issues and goals and objectives. Lisa Lamb presented information on a new goal of academics that will be included in the updated LCER Strategic Plan.

Kirt asked that more information on what's being done in math, robotics, etc. be included in the Board packets/meetings. Russ asked about coding and measureable results.

Lisa and Pat will make the revisions to the LCER Strategic Plan, and the Exec Team will review the objectives, and then bring the revised plan to the LCER Board for approval.

5.0 Adjournment

Chairman Bud Biggs adjourned the meeting at 3:30 p.m.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX E

Special Meeting of the
Lewis Center for Educational Research Board of Directors

Minutes
October 19, 2018

1. **CALL TO ORDER**: Chairman Kevin Porter called the meeting to order at 8:35 a.m.

2. **ROLL CALL**: LCER Board Members Duberly Beck, Kirt Mahlum (arrived at 9:00 a.m.), Jim Morris, Omari Onyango (left at 2:30 p.m.), Kevin Porter, David Rib and Marcia Vargas were in attendance.

   LCER Board Members Sharon Page and Rick Wolf were absent.

   Staff members Valli Andreasen, Fausto Barragan, Ryan Dorcey, Teresa Dowd, David Gruber, Lisa Lamb and Stacy Newman and Paul Rosell were also in attendance.

   Pat Caldwell facilitated the Strategic Planning.

3. **PUBLIC COMMENTS**: None

4. **DISCUSSION/ACTION ITEMS ON STRATEGIC PLANNING**:
   .01 LCER Organizational Structure/Board and Staff Roles: Pat Caldwell led an activity on the structure of the LCER. David Gruber also presented information on how LCER is funded.
   .02 Review/Update LCER Strategic Plan S.W.O.T. Analysis: Strengths, weaknesses, opportunities and threats were identified.
   .03 Review/Update LCER Strategic Plan Existing Goals: Pat Caldwell instructed the Board that strategic planning is visionary. The Board sets goals, which give direction for staff and the organization. Staff then develops objectives and strategies for how to implement the goals. Strategies can change throughout the year. Existing goals were reworded to the following:
   Goal 1 – Build the financial capacity of the LCER, including key provisions for sustainability.
   Goal 2 – Develop and maintain facilities to meet the TK-12 needs at both campuses.

Goal 3 - Strengthen the academic programs at both schools resulting in increased student mastery.
Goal 5 – (formerly Goal 4) The Lewis Center for Educational Research will communicate and operate under a common vision, mission, goals and objectives.

.04 Identify any New Critical Issues and Goals: The top 3 critical issues identified were: Successful NSLA expansion, financial stability/capacity, and maintain a high quality staff.

The following new goal was numbered as Goal 4 – Recruit, develop and retain a highly qualified staff.

The Executive Team will develop new objectives and strategies for implementing the goals, and the Strategic Plan will be revised and brought back to the Board for approval in February.

5. **ADJOURNMENT:** Chairman Kevin Porter adjourned the meeting at 3:30 p.m.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX F

Special Meeting of the
Lewis Center for Educational Research Board of Directors

Minutes
August 9, 2019

1. **CALL TO ORDER**: Chairman Duberly Beck called the meeting to order at 8:25 a.m.

2. **ROLL CALL**: LCER Board Members Duberly Beck, Pat Caldwell, Jim Morris, Sharon Page, and Jessica Rodriguez (left at 1:00 pm.), Marcia Vargas and Rick Wolf were in attendance.

   LCER Board Members David Rib and Omari Onyango were absent.

   Staff members Valli Andreasen, Fausto Barragan, Matthew Cabe, Marcelo Congo, Ryan Dorcey, Teresa Dowd, David Gruber, Lisa Lamb and Stacy Newman were also in attendance.

   Heather Kinney attended the afternoon session on behalf of SBCSS.

3. **PUBLIC COMMENTS**: None

4. **DISCUSSION/ACTION ITEMS**:
   .01 Review and Update LCER Mission and Vision – the LCER Board stated they would like to be more informed verbally about data driven results. They would like to add Global Society into the objectives. The LCER Board and LCER staff divided into 4 groups to work on the mission and vision, and then had a discussion as a whole. There was a discussion whether "student success" or "school and programs" should be first in the mission statement. The new mission statement developed for approval within the updated Strategic Plan is: "To ensure student success in a global society through data driven and research based schools and programs that are safe, innovative and culturally inclusive." A committee was developed to work on the vision – Lisa Lamb, Sharon Page, Matt Cabe and Fausto Barragan.

They will bring the vision forward for approval by the LCER Board. Information from the groups will be shared with the committee.

.02 Complete S.W.O.T. Analysis for 2019-20 School Year -

Strengths - NASA, passion, leadership, longevity, culture, safe, language, model-exemplary, campuses-facilities, student services, broadly supportive, different expectations, well-known, community, partnerships, diversity, committed board, parents, staff & faculty, Special Ed, inclusive, unique programs, STEAM, extra-curricular, diverse community, best practices, data driven, research based, PLCs, camaraderie, big wait list, curiosity, relationship with authorizers, relationships with elected officials, finances, stability, reputation, WASC accreditation, dual language, award winning programs, well established, back office structure, innovation, partnerships world wide, PR person, Lewis Center Foundation

Weaknesses - Internal marketing, student participation in GAVRT and space science classes, visibility, external marketing, local outreach needs to be reimagined, nobody knows our current story, not visionary, two schools working together to share best practices - still feels like forced play, branding, fundraising, energy of science teachers - no passion, competition for teachers, science isn't a fundamental part of our culture, salaries for teachers and administration, lack of science labs and resources, lack of team development in science programs, facilities a challenge, budgeting management of facilities, management of facilities - not enough special types of classrooms, maintenance and upkeep of grounds, not enough space, student recruitment at NSLA and AAE HS, grading policy no D, rigor, lack of fiscal and staffing to innovate, need more thinking outside of the box, challenge to meet the basics while enhancing ability to innovate, sports facilities at NSLA, stipends for sports staff, lack of school spirit, not enough onsite facilities for sports

Opportunities - NASA is cool right now, grant $ for languages/STEM/low economic populations, college partnerships, optical telescope at CSUSB, parent connection, partnership opportunities, fundraising opportunities, artificial intelligence, leverage partnerships with business community, industry internships, cyber security program at CSUSB, free camp for ms girls, informal education partnerships (i.e. Discovery Cube), expand global exchanges, alumni involvement, local elected officials

Threats - political, California, litigious society, legislative, unfunded mandates, rules, compliance, CTA, other district compensation, other dual immersion programs, magnet schools, anti-immigration, tariffs, teacher shortage, city of SB disfunction, special ed law and litigation, vaping, social media, social-emotional trauma, mental health, cost of providing services, school safety, hard to keep up with changes - esp in technology, cost of doing it, home school charters/other educational opportunities, screen

time, cell phones, lack of human interaction, irrational parents, teachers who come with bad habits, cyber hacking

.03 Review Goals and Progress Made in 2018-2019 School Year – Lisa Lamb handed out progress on the goals and reviewed the current goals which she feels are still relevant.

.04 Finance Presentation – John Phan, Urban Futures Incorporated - Jim Morris recused himself for this presentation. John Phan reported that we interviewed and hired a new development team and the reasons for the change. He talked about the structure options for financing including concepts and terms. A tax exempt bond is the number one way for charters to finance. For the underwriter selection, two firms were chosen. Cross collateralization will not be required. We will need to establish two special purpose entities (LLC). This also allows an opportunity to refinance current bonds and separate additional financing to build AAE a multipurpose room as well as the NSLA new campus. The LCER Board would like a breakdown of how AAE can afford a higher loan amount. John will provide this.

.05 Norton Campus Expansion Development – Larry Rieder, Charter School Property Solutions

Larry Rieder presented on the Norton campus expansion development and provided an entitlement approval schedule. Final approval is expected February 15. Financing doesn't close until that process is completed. He also showed a new site plan that was reviewed.

.06 Critical Issues were not discussed as the current goals are still relevant.

.07 Updated and Revise LCER Goals as Needed - Goal 3 was updated to be titled "Student Success" instead of "Academics" to reflect the new mission statement. "Diversity" will be added to Goal 4. New objectives will be created by the Exec Team based on today's conversations.

5. **ADJOURNMENT:** Chairman Duberly Beck adjourned the meeting at 3:53 p.m.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX G

Special Meeting of the
Lewis Center for Educational Research Board of Directors

Minutes
April 15, 2022

1. **CALL TO ORDER AND PLEDGE OF ALLEGIENCE**: Chairman Rodriguez called the meeting to order at 8:00 a.m.

2. **ROLL CALL**: LCER Board members Pat Caldwell, Jim Morris, Sharon Page, Kevin Porter, David Rib, Jessica Rodriguez, and Pat Schlosser were in attendance.

   Staff members Valli Andreasen, Fausto Barragan, Marcelo Congo, Jisela Corona, Ryan Dorcey, Teresa Dowd, David Gruber, Lisa Lamb and Stacy Newman were also in attendance.

3. **DISCUSSION ITEMS**:

   .01 Revisions to the LCER Strategic Plan were discussed, including identifying strengths, weaknesses, opportunities and threats. Goals and objectives were reviewed to see if they were still needed, had been completed, should be reworded or if new goals were needed. The top issues identified were:

   - Staffing/management partnership/flexibility
   - Mental Health: student, staff, family
   - Communication/engagement
   - Student success to include SEL, Critical Thinking, Academics, Career Guidance

   Revised goals that will be included in the new plan are:

   - Goal 1: Maintain fiscal stability and seek diversified outside funding that allows us to be innovative.
   - Goal 2: Strengthen all school programs and enrichment opportunities at both schools resulting in student success in the areas of academic, behavioral, and social emotional wellness.
   - Goal 3: Recruit, develop, and retain a highly-qualified, innovative, flexible, and diversified staff.
   - Goal 4: The LCER will communicate and engage our students, staff, families, and community partners to drive a shared commitment to our common vision, mission and goals.

   The goals may be reworded slightly during development of strategies and objectives by Exec Team.

   .02 Kevin Porter provided a presentation on Conflict of Interest.

.03 Pat Caldwell went over the structure of the Lewis Center and the various arms of the organization. She reviewed the new goals with Foundation Board members. Possible fundraising opportunities related to the goals discussed were:

- Increase capital campaign funds
- Rent out facilities when not in use
- Look into county programs for community outreach
- Training for teachers in student issues
- Advertise educational activity grants
- Tell our stories
- STEM funding
- Grant writing support staff
- Employee recognition program, all staff gifts
- Compensation for activities after school or during breaks, help with recruitment
- Help get our name out there with a flyer to share with contacts
- Identify new partners and what we want them to do, get parents involved, survey alumni

4. <u>INFORMATION INCLUDED IN PACKET</u>:

.04 LCER Strategic Plan 2020-2025 with Notes Added on Progress

5. <u>ADJOURNMENT:</u> Chairman Rodriguez adjourned the meeting at 2:00 p.m.

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX H

Special Meeting of the
Lewis Center for Educational Research Board of Directors

Minutes
April 5, 2024

1. **CALL TO ORDER AND PLEDGE OF ALLEGIENCE**: The meeting was called to order at 8:05 a.m.

2. **ROLL CALL**: LCER Board members Yolanda Carlos, Steve Levin, Omari Onyango, Sharon Page, David Rib, Jessica Rodriguez, Marisol Sanchez and Pat Schlosser were in attendance. Member Pat Caldwell was absent.

3. **DISCUSSION/ACTION ITEM**:
   - **.01** Brown Act and Conflict of Interest Training – Jerry Simmons, YM&C, went over roles and responsibilities of Board Members and Management. He reminded the Board to ask questions of Admin as their duty includes fiscal oversight. It is best to ask questions during the Board meeting, in case someone else has the same question and then can hear the answer. If asked beforehand, the CEO can share in their comments. Attendance at meetings is very important to be sure members are knowledgeable about what is going on. He covered how to avoid conflicts of interest and annual disclosure requirements. Brown Act rules and Public Records were covered as well. He discussed charter renewal criteria and how to make the best case for renewal. Board members should review the charters to be sure the schools are doing what they said they would.
   - **.02** Discuss Revisions to LCER Strategic Plan to Include S.W.O.T. Analysis, Review of Goals and Objectives, and Develop New Goals if Necessary – The LCER Board and Exec Team divided into groups to review data from the dashboard as well as survey feedback from students, parents and staff. Strengths, weaknesses, opportunities and threats were identified from the data. Goals were reviewed and new objectives will be developed by the Exec Team.

4. **INFORMATION INCLUDED IN PACKET**:
   - **.01** LCER Strategic Plan 2022-2027

5. **ADJOURNMENT:** The meeting was adjourned at 3:30 p.m.

APPENDIX I

S.W.O.T. ANALYSIS (2016)

At the second planning session, planning team members engaged in a "mini" environmental analysis by brainstorming the organization's strengths and weaknesses (internal) and opportunities and threats (external). Their determination of strengths that might be enhanced and weaknesses that might be corrected, along with opportunities and threats presented by the external environment, helped guide them when deciding what critical issues must be addressed. Their brainstormed S.W.O.T. follows:

Strengths

- Highly dedicated staff
- Parent support
- Engaged students
- Motivated Board
- Outside the box thinking
- Culture
- Safe environment
- Small class sizes
- Caring staff
- Private school environment
- Less bureaucracy
- Passionate about learning
- Tight community feel
- Non-negotiation
- Successful K-12 program
- Technology rich
- Partnerships
- Enrichment programs
- Well-balanced education
- Parents that care
- Facilities
- Locations
- Relationships with chartering agencies
- Relationships with other agencies
- Pride
- GAVRT, Bridge, Local Outreach, HiDas,
- Successful alumni
- AFROTC
- Political connections
- Media connections
- Bi-literacy

- Chinese partnerships
- Board connections

Weaknesses

- Lack of planning
- GAVRT
- Lack of transparency
- Communication
- Facilities & Norton
- Lack of marketing
- Detailed budget planning
- No football team
- Weak in developing new partnerships
- Teacher turnover at NSAA
- Relationships between board & exec team
- Student attrition
- Fund development
- Low salaries
- No multi-year budget
- Lack of capital investment
- Current policies
- Lack of leadership transition planning
- Lack of stakeholder involvement
- Tracking alumni
- NSAA treated like stepchild
- Lack of proactive recruitment of teachers
- Lack of student recruitment
- Broken promises
- Weak Board
- Uninformed Board
- Lack of Board participation at Festival of Arts at AAE

Opportunities

- Business partnerships
- University partnerships
- Developing real estate at AAE & NSAA
- STEM partnerships
- Fund development
- Relationship with alliance for education
- Internships
- Political relationships
- Alumni
- Low interest rates, rising economy
- Partnership with community service agencies

- 740 program & Prop 39

Threats

- Other salary schedules elsewhere
- Competing dual immersion programs
- Shortage of teachers
- Uncertain revenues
- Common core vs. the unknown
- County/city involvement in our lease
- Anti-charter movement
- Negotiation
- Teacher training institutions have bad impression of charter schools
- More legislation coming
- Needing more legal advice due to regulations
- Security
- LCAPS more regulated
- Charter renewals
- Desert Trails controversy

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX J

S.W.O.T. ANALYSIS (2017)

Strengths

- After School Program
- At will
- Board of Directors
- Branding
- Chinese partnerships
- Communication
- Culture
- Engaged students
- Enrichment opportunities
- Jim Foley
- Leadership
- Low staff attrition
- Non-negotiation
- Parent support
- Partnerships
- Political connections
- Potential
- Private school environment
- Relationships
- Safe environment
- Salary flexibility
- Sports
- Strong administration
- Strong relationships with authorizers
- Teachers
- Technology rich
- Transparancy

Weaknesses

- Data analysis
- Doing business in California
- Gathering data from stakeholders
- GAVRT in classrooms
- Facilities
- Financial responsibilities
- Financial resources

- Financial understanding
- Lack of marketing
- Low salaries
- Online presence – social media
- Policy revisions
- Standard operating procedures for support departments
- Tracking alumni
- Visibility

Opportunities

- Advocacy
- Alumni
- Conference presentations
- Corporate partnerships
- Educational association connections
- Environmental land trust
- Friendraising
- Funding opportunities
- Partnerships
- Political connections
- Speaker's bureau – former board members
- STEM partnerships
- Student internships
- University and community college partnerships

Threats

- Lease with SB County/City
- Legislation
- Natural disasters
- Other salary schedules elsewhere
- Security – cyber and campus
- Shortage of teachers and subs
- Negotiation
- Well-funded anti-charter movement

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX K

S.W.O.T. ANALYSIS (2018)

Strengths

- Board
- People
- Supportive arents
- Great reputation
- Innovation
- Diversity
- Partnerships
- GAVRT
- Relationship with authorizers
- Longevity
- History
- Wait list
- Strong & unique academic programs
- Dual immersion
- Fiscal stability
- Fiscal process
- Technology
- Location of schools
- Reach – global, national
- Discussing, not attacking
- Dedication
- Transparency of budget process
- Strategic Planning
- Bylaws revisions
- General morale
- More trust
- Leadership
- Communication
- Students first
- Retention
- High quality staff
- Retention of students
- Professional development
- Flexibility
- Utilize best practices
- Integrity

- Loyalty
- Respect
- Exemplary Systems
- Safe schools
- School uniforms
- Small class sizes
- TK-12 schools
- Nurturing Culture
- Fiduciary oversight
- Blank slate for Norton facilities
- Risk tolerance
- Risk takers
- Small schools
- Small CMO
- High level of volunteers
- Parents Involved
- Legacy

Weaknesses

- Financial uncertainty
- Growth – how to successfully grow Norton
- PR/marketing
- Fund development
- Compensation levels
- Communication
- Facility planning
- Facility maintenance
- Board knowledge of programs
- Goofy lease terms
- Historical decisions/mistakes
- Legacy
- Updating policies
- STEM/STEAM at Norton
- Board visibility
- Exec team presence
- Perception of inequities between Norton and AAE
- Succession plan
- Budget inflexibility
- Support for new employees
- High supervisor ratio
- Math test results
- Academic achievement at Norton and AAE
- Labs at both schools
- Complacency

- Lack of resources compared to non-charter public schools
- Lack of participation in activities for special needs students
- Special ed culture at Norton
- Geographical distance between schools
- Lack of understanding of the uniqueness of each school
- Challenge of writing IEPs for English speaking student in dual immersion program
- Lack of waiting list at Norton
- Stability/strength of middle school at Norton
- High school waiting list at AAE
- Lack of charitable giving
- LCER reputation and presence in Inland Empire
- Number of Board members from Inland Empire
- Small athletic program
- Overburdened leadership
- Lack of transitional planning

Opportunities

- NGSS standards
- NASA partnership
- Informal education
- Address local or regional educational needs
- Attract students because of graduation rates and college going numbers
- Lack of other high performing charter schools
- Magnet focus to fill the void in world languages
- Build a high school with an end in mind
- Align classroom experience with unique extracurricular programs
- Can put interns into the classroom
- Stay ahead of next cutting edge trend
- Become role model for other dual language schools
- Tough challenge to always be out in front
- Become known as the leading charter schools
- Can gain more community support
- Growth at Norton
- Land trust
- University partnerships for staff recruitment and PD

Threats

- Attack on charter schools
- Negotiation
- PERS/STRS
- Comparable salaries/compensation
- State funding for charter schools
- Anti-charter governor

- Economy
- Teacher shortage
- Competition for bilingual teachers
- Socio-economic status of demographics in region
- Growth of special ed needs
- Perception of bloated admin and fiscal mismanagement
- Declining prospective student population
- Technological demand of education in 21st century
- Litigation
- Security threats – cyber attack, terrorism, etc.
- Opposition to our program expansion
- AVUSD board election
- Increasing regulatory requirements
- No appeal rights with county authorizer
- Students overuse of technology/language skills dropping, etc., less interaction
- Diminishing social skills
- Ghost charters
- Substitute shortage

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX L

S.W.O.T. ANALYSIS (2019)

Strengths

- NASA
- Passion
- Leadership
- Longevity
- Culture
- Safe
- Language
- Model-exemplary
- Campuses-facilities
- Student services
- Broadly supportive
- Different expectations
- Well-known
- Community
- Partnerships
- Diversity
- Committed board, parents, staff & faculty
- Special Ed
- Inclusive
- Unique programs
- STEAM
- Extra-curriculars
- Diverse community
- Best practices
- Data driven
- Research based
- PLCs
- Camaraderie
- Big wait list
- Curiosity
- Relationship with authorizers
- Relationships with elected officials
- Finances
- Stability

- Reputation
- WASC accreditation
- Dual language
- Award winning programs
- Well established
- Back office structure
- Innovation
- Partnerships world wide
- PR person
- Lewis Center Foundation

Weaknesses

- Internal marketing
- Student participation in GAVRT and space science classes
- Visibility
- External marketing
- Local outreach needs to be reimagined
- Nobody knows our current story
- Not visionary
- Two schools working together to share best practices - still feels like forced play
- Branding
- Fundraising
- Energy of science teachers - no passion
- Competition for teachers
- Science isn't a fundamental part of our culture
- Salaries for teachers and administration
- Lack of science labs and resources
- Lack of team development in science programs
- Facilities a challenge
- Budgeting management of facilities
- Management of facilities - not enough special types of classrooms
- Maintenance and upkeep of grounds
- Not enough space
- Student recruitment at NSLA and AAE HS
- Grading policy no Ds
- Rigor
- Lack of fiscal and staffing to innovate
- Need more thinking outside of the box
- Challenge to meet the basics while enhancing ability to innovate
- Sports facilities at NSLA
- Stipends for sports staff

- Lack of school spirit
- Not enough onsite facilities for sports

Opportunities
NASA is cool right now
Grant $ for languages/STEM/low economic populations
College partnerships
Optical telescope at CSUSB
Parent connections
Partnership opportunities
Fundraising opportunities
Artificial intelligence
Leverage partnerships with business community
Industry internships
Cyber security program at CSUSB
Free camp for ms girls
Informal education partnerships (i.e. Discovery Cube)
Expand global exchanges
Alumni involvement
Local elected officials

Threats
Political
California
Litigious society
Legislation
Unfunded mandate
Rules
Compliance
CTA
Other district compensation
Other dual immersion programs
Magnet schools
Anti-immigration
Tariffs
Teacher shortage
City of SB disfunction
Special ed law and litigation
Vaping
Social media
Social-emotional trauma

Mental health
Cost of providing services
School safety
Hard to keep up with changes - esp in technology
Cost of doing it
Home school charters/other educational opportunities
Screen time
Cell phones
Lack of human interaction
Irrational parents
Teachers who come with bad habits
Cyber hacking

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX M

S.W.O.T. ANALYSIS (2020)

Strengths

- Professional organization for 30 years
- Academic record
- Financially stable
- Parent engagement
- Strong community
- Partnerships
- Innovation
- Unique programs
- Board
- Leadership
- Facilities/buildings
- Ineresting story
- Inclusive
- Our people
- Staff stability
- Experience
- Committed staff
- Special education
- History
- Reputation
- We are global
- Alumni excel
- Student perspective
- Student leadership opportunities
- AFJROTC
- Field trips
- ASB
- Ambassadors
- Chilean delegation
- Global travel
- Advocacy
- Fundraising
- Research
- Data driven

- Financial discipline
- Safe
- Desired schools
- Vigor
- Strong professional development
- Bilingual
- Connections because we are TK-12
- Waitlist
- GAVRT
- Small schools
- Family feel
- Personal relationships
- Strong relationship with authorizers
- Strong technology
- Relationship builders
- Pride of students and staff
- Multi-cultural
- Diversity
- Student supports
- Lewis Center Foundation
- Exec/Board Collaboration
- Social emotional learning (SEL)
- Shared leadership
- Parents
- Volunteers
- How we have weathered COVID
- Locations of our 3 campuses
- Distinguished/honors
- WASC
- Enrichment

Weaknesses

- Dont recognize strengths
- Don't self promote (e.g. ordering banners and completing applications for recognition)
- Distance between campuses
- Aligning practices across organization/schools
- Branding
- Recruitment for students
- Staff diversity
- Salary schedules

- Building leadership succession
- Online presence
- Consistency in communication using different platforms
- Lack of tech training for parents
- Lack of intentional outreach to students of higher need
- AAE reputation of not being a diverse population
- Reality vs. Reputation
- Being one, sharing opportunities with all students (e.g. GAVRT)
- Staff don't know GAVRT
- Staff doesn't understand charters
- We don't tell our story
- Feel too established, not hungry, like a District
- Waitlist at NSLA
- Not taking advantage of recruitment opportunities
- GAVRT not benefitting our own students
- Lack of teacher enthusiasm for programs
- Strenth of HS sports (facilities, transportation)

Opportunities

- To become involved in IE groups
- Partner w/SBCUSD
- Voice in chambers
- Shine as a charter compared to districts
- Alumni
- Socail injustice
- Share courses between our high school or with local community colleges
- Space Force
- New NSLA campus
- COVID silver linings
- NSLA as a demonstration school for dual immersion
- MPR at AAE
- Bias training
- Bringing more science to NSLA
- STEM programs
- Grants – 3 NSF, ROSES, NASA
- Marketing LCER Program
- Math – build out strength
- Aviation licensing/career pathway (much to develop)
- Apple Valley train station
- Outreach
- Together United

- Diversification

Threats

- COVID-19
- Closures imact on students
- Unlearn unhealthy habits from pandemic
- Learning loss
- Negotiation
- California budget
- Political landscape/climate
- Reliable sources
- Biases
- Fears
- Election results
- Litigation (e.g. SPED)
- SB City political instability/chaos
- AVUSD school board changes
- County-wide benefit lacks appeal process
- Changing nature of delivering education – online programs/charters
- Media (e.g. COVID-19)
- Social media
- Competive salaries in local districts

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX N

S.W.O.T. ANALYSIS (2022)

Strengths

- strategic planning
- great reputation
- leadership
- collaboration with authorizer
- staff
- families
- facilities
- leadership
- ROTC
- Technology
- community interest
- longevity of staff
- leadership opportunities for students
- STEM opportunities for students
- Partnerships, i.e. NASA/JPL
- professional development
- 2 very different schools
- nationally recognized special education program
- talented teachers (including bilingual)
- dual immersion program
- our board (caliber, attendance, support, longevity)
- reputation within charter community
- finances
- sound fiduciary oversight
- scientific and educational research
- global organization
- transparency
- positive publicity
- Foundation fundraising
- alumni (returning to work at LCER)
- athletics program
- sportsmanship/character
- academic rigor
- preparing students for college and career
- SEL support
- advocacy

- LCER general admin support of schools
- waiting list at both schools
- AAE endangered species on campus: tui chub and desert tortoise
- AP capstone diploma
- Volunteers
- TK-12

Weaknesses

- distance between schools
- LCER/AAE/NSLA relationship/location
- secondary science program
- science facilities/labs at AAE
- communication and perception from parents
- school meals (vendor for two schools, scale of purchasing, administration, quality)
- diversity of staff (gender, race)
- staff response to changing student demographics and needs
- transportation
- developing staff leadership and admin capacity
- communicating GAVRT
- internal GAVRT offerings
- economic uncertainty
- major student discipline and ability to handle
- math assessment scores
- became traditional district/model
- communicating research,
- $$$
- need more space at AAE
- athletic facilities

Opportunities

- external funding
- STEM ecosystems
- growing our Inland Empire partnerships
- community outreach
- partnering between both schools
- cutting edge educational research
- technology
- bring in professionals
- engineering
- increase community use of facilities
- increase outside field trips
- MEEC
- NSLA gym/athletics

- non-traditional elective offerings
- non-negotiation
- parents
- volunteers

Threats

- risk adverse
- litigation
- economic
- negative charter environment
- negotiation
- social media
- technology
- charter school funding
- homeless
- special ed due process
- great resignation
- teacher shortage
- external culture
- anti-authority/education
- entitlement
- over protective labor laws
- increasing sp ed population
- political battles impacting education
- pandemic – endemic
- school safety/violence
- environment – theft/homeless
- future not stable
- uncertainty
- increasing mental health concerns

Lewis Center for Educational Research
STRATEGIC PLAN

APPENDIX O

S.W.O.T. ANALYSIS (2024)

Strengths – students feel safe, clear rules (2/3rds), facilities/buildings, students feel support and respected by staff, lots of opportunity for involvement (students), communication, high support at home (parent), students are safe (according to parents), admin creates an environment for students to grow, supportive admin, professional development, restorative practices are working across campuses, strong school culture, board decisions are based on LCER goals, SEL, IT is strong, EL progress is moving upwards, broad course of study, implementation of academics, grade rate at AAE and college/career readiness, partnerships – local and global, GAVRT, best practices, Board, AAE WASC 6 year renewal, SPED recognition, charter school recognition, community outreach by students and staff, Foundation, Ambassador program, longevity and experience of staff, retention of staff and students, school culture, extracurricular opportunities, financial stability and fiscal stewardship, dual enrollment, dual immersion (NSLA)

Weaknesses – ½ of students on both sites report bullying, students felt that other are misbehaving (50%), AAE parking/drop off, student drivers, students don't like uniform policy, parents want more tutoring, parents want volunteer opportunities to be better communicated, bathrooms – monitoring, cleanliness (at both schools), still building programs at NSLA, NSLA drop off/pick up, achievement gaps by subgroup at both schools, low motivation by some students, science labs, AAE's demographic doesn't reflect the neighborhood population, dual immersion re-seating, distance between 2 campuses, staff didn't understand how student supports improve outcomes, not enough restrooms (staff), staff feel that more Tier II supports are available for need, staff want more PD for class management or job-specific, NSLA open positions, dashboard (both schools) – ELA decreased at both schools, math overall, chronic absenteeism, high suspension rates, staff knowing/understanding dashboard

Opportunities – elementary sports, new curriculum, many partners are eager to work with our schools/classrooms (currently lack staff capacity/bandwidth to implement, allocate more resources to close the academic gap for students in need, evaluate/redesign current DLI program at NSLA, to communicate who we are as schools to public, families, staff

Threats – food – compliance vs. taste (looking at vendors), home influence on learning, attendance and behavior, dashboard, charter renewal (especially at NSLA), charter attack laws, labor law – stipends, apathy/low motivation of families/society, lottery is blind – hard to recruit/target populations, public perception that we are private, social media trends/cell phones, substance abuse on campuses, litigation – SPED and personnel, state budget deficit, ADA

Stakeholder Group S.W.O.T.

Group 1 – Student Feedback

- Strengths – Strong sense of safety (AAE/NSLA), facilities and buildings, clear rules (both), students feel supported especially from teachers (both), students feel respected by teachers (both), lots of opportunities for involvement (both)
- Weaknesses – Bullying (both), food (both), student perceived weakness – dress code (both), misbehavior (both), parking/drop off (AAE), student voice not heard (AAE 48% NSLA 33%)
- Opportunities – Give students voice and some control over dress code (NSLA), elementary sports – soccer, baseball, etc. (NSLA)
- Threats – food (both)

Group 2 – Parent Feedback

AAE – MS bathrooms, more tutoring, volunteering – more communication needed, school safety – bathroom monitoring/cameras, 58% communicate weekly or monthly, 62% parent-high support at home, 18% weekly – helping in class, 77% confident – support at home, respectful, enough options for students, 68% students feel safe, 47% admin creates environment that helps students grow

NSLA – Librarian, marquee, tutoring/intervention, school lunches – options & nutrition, multi-cultural events, parent liaison to help with communication, school safety officer, cell phone policy, 67% communicate weekly/monthly, 86% frequently help in the classroom, 17% help weekly in the classroom, 85% confident-support at home, 90% feels discipline is working for their child, 80% child feels safe at school, 90% school values diversity, 85% admin creates environment that helps students grow

Group 3 – Staff Feedback

- Strengths – Admin is supportive, facilities, professional development, culture, safe, experience, small school/great supports, SEL, behavior, supported by supervisors, Exec/Board makes decisions based on LCER goals
- Weaknesses – Inexperience – incoming coaching/modeling, new teachers need support in the classroom, LCER staff doesn't understand how student supports improve student learning outcomes, participation and capacity, perception that grades don't affect participation, perceived consequence doesn't improve behavior, staff restrooms, limited academic supports
- Opportunities – differentiated learning, training, paid internships at our school vs. others, coaching, staffing
- Threats – Home environment affecting performance and behaviors, legislation, perception i.e. funding/raises

Group 4 - Dashboard Data

NSLA

- Strengths - EL Progress, parent & family engagement, implementation of academic, access to broad course of study

- Weaknesses – ELA and math in multiple subgroups, suspension rate, chronic absenteeism
- Opportunities – All staff knowing and understanding data, college and career opportunities, new curriculum
- Threats – charter renewal

AAE

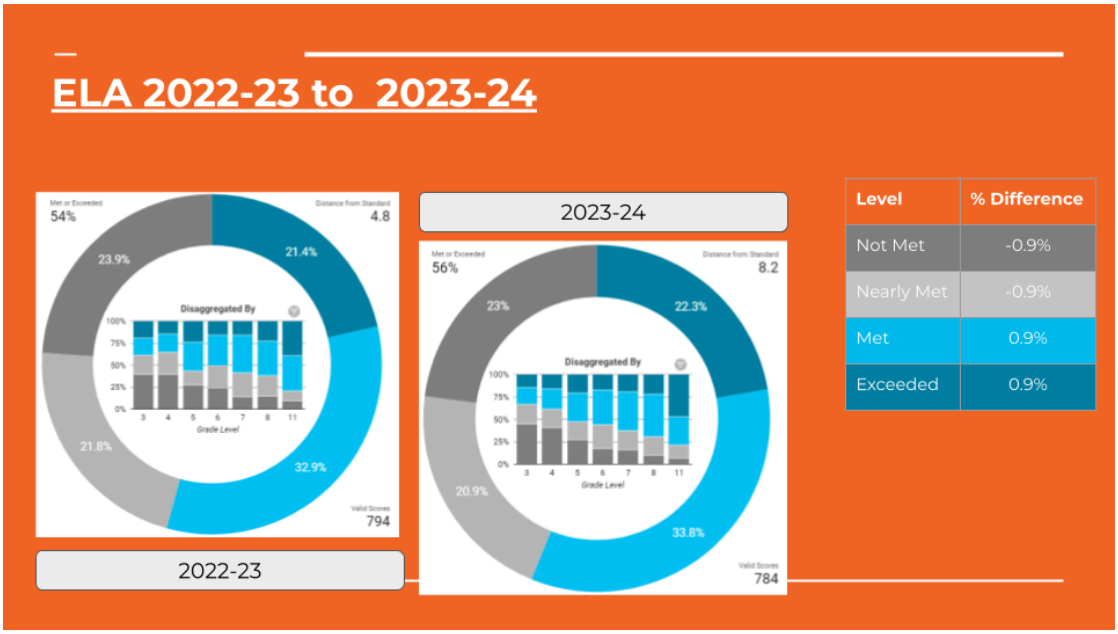
- Strengths – Grad rate, EL progress moving up, college and career readiness, parent and family engagement, implementation of academics, access to broad course of study
- Weaknesses – ELA low even though it's above standard based on subgroups, math, students with disabilities, chronic absenteeism, suspension rate
- Opportunities – All staff knowing and understanding data, new curriculum
- Threats – charter renewal

Both

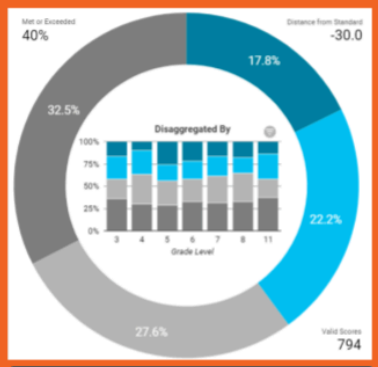
- Strengths - EL Progress (AAE grade rate)
- Weaknesses – Chronic absenteeism, suspension, students with disabilities
- Opportunities – ALC implementation

Lewis Center for Educational Research
STAFF REPORT

Date: September 16, 2024
To: LCER Board of Directors
From: Lisa Lamb
Re: President/CEO Report

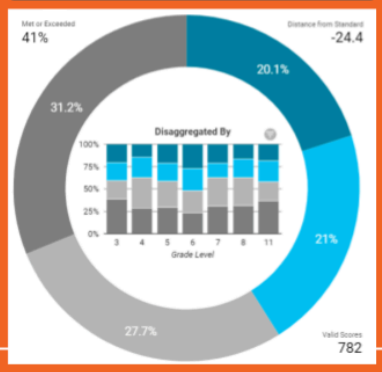
Goal 1: Enhance all school programs and enrichment opportunities at both schools to promote student success in academics, behavior, and social-emotional wellness.	
1.1 Objective: Academic – Demonstrate academic progress as measured by the California Dashboard, site-level assessments, and verifiable data.	

Math 2022-23 to 2023-24



2022-23

2023-24



Level	% Difference
Not Met	-1.3%
Nearly Met	0.1%
Met	-1.2%
Exceeded	2.3%

SCHOOL PERFORMANCE OVERVIEW

Norton Science and Language Academy

Generate PDF Report

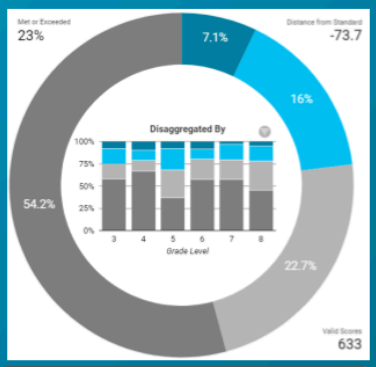
View Additional Reports

2023

Explore the performance of Norton Science and Language Academy under California's Accountability System.

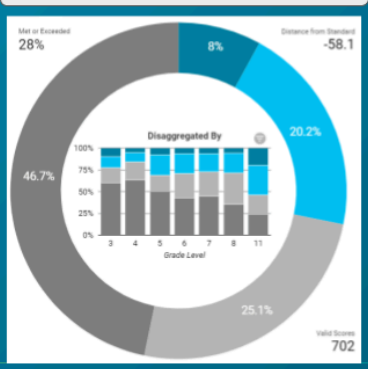
Chronic Absenteeism: Yellow	Suspension Rate: Red	English Learner Progress: Green	English Language Arts: Red
Mathematics: Red	Basics: Teachers, Instructional Materials, Facilities: STANDARD MET	Implementation of Academic Standards: STANDARD MET	Parent and Family Engagement: STANDARD MET
Local Climate Survey: STANDARD MET	Access to a Broad Course of Study: STANDARD MET		

Reading 2022-23 to 2023-24



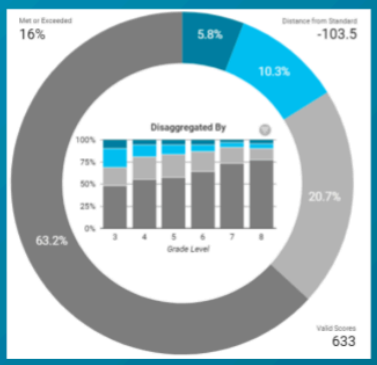
2022-23

2023-24



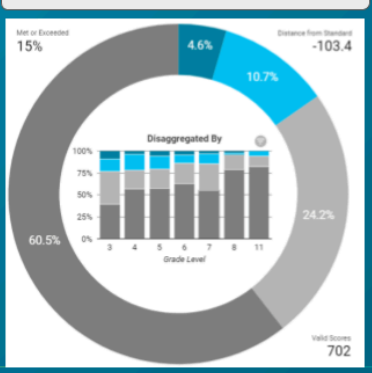
Level	% Difference
Not Met	-7.5%
Nearly Met	2.4%
Met	4.2%
Exceeded	0.9%

Math 2022-23 to 2023-24



2022-23

2023-24



Level	% Difference
Not Met	-2.7%
Nearly Met	3.5%
Met	0.4%
Exceeded	-1.2%

1.2 Objective: Behavior – Demonstrate behavioral improvement as measured by system reporting (i.e. Infinite Campus, California Dashboard, Average Daily Attendance (ADA), etc.)

AAE Data

	EOY	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Secondary Attendance	94.79	96.78							
Secondary Tardies (all periods)		428							
Elementary Attendance	94.36	96.23							

Secondary Enrollment	797	801							
Elementary Enrollment	673	679							
Total Enrollment	1470	1480							
ALC's	176	0							
Suspensions	31	7							
Walk Thrus (Progressive)	501	187							

NSLA Data

	EOY	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Secondary Attendance	92.39								
Secondary Tardies (all periods)									
Elementary Attendance	92.43								
Elementary Tardies (Beginning of day only)									
Secondary Enrollment	525								
Elementary Enrollment	640								
Total Enrollment	1165								
ALCs									
Suspensions	87 (53% drop)								

1.3 Objective: Behavioral and social emotional wellness – Demonstrate SEL progress as measured through multiple individual and group measures,

AAE

Socioemotional Counselor Caseload:

- Individual Counseling:
  - 26 total clients

counseling statistics, mental health referrals, etc. (i.e. Infinite Campus, Parsec REAL, etc.)	■ 14 Elementary ■ 6 Middle School ■ 7 High School ● Group Counseling: ○ 56 referrals Tk-12 ○ Groups will be divided into Anxiety and Self-control categories ● 1 School Psychologist Collaborating with Special Education and General Education students ○ 10 students (SPED and GENED) **Other Socioemotional Learning (SEL) Supports:** ● 4 Desert Mountain Children's Center Counselors supporting students under the Student Assistance Program, the Screening Assessment Referral and Treatment program (SART), and the School-Aged Treatment Services (SATS) program **<u>NSLA</u>** **Socioemotional Counselor Caseload:** ● Individual Counseling: ○ 40 students ● Group Counseling: ○ Worries - 9 students invited (elementary) ○ Social Skills-3 students invited (elementary) ○ Friendship skills/Social Skills - 5 students invited (elementary) ○ Changing Families - 4 students invited (elementary) ○ Positive Interactions/Decision Making Small Group - 2 MS students invited ● Crisis Assessment/ Interventions Total: 4 ● NSLA- Walking on the Moon - shoe donations ○ No updates ● 1 NSLA School Psychologist: ● Supporting 25 cases (General Education / SPED) **Other Socioemotional Learning (SEL) Supports:** Desert Mountain Children's Center: ● 1 Clinical Counselor ○ Supporting 25 cases at the TK -12 level San Bernardino County Superintendent of Schools: ● 1 Clinical Counselor providing ○ Supporting 30 cases at the TK-12 level **GoBeacon Lewis Center Data 8/5 - 9/2:** ● AAE: 153 Incoming Alerts - All Cleared ● NSLA: 38 Incoming Alerts - All cleared **Care Solace Lewis Center Data 8/5 - 9/2:** ● AAE: 0 referrals to date ● NSLA: 3 referrals processed **StopIt Reports AAE:** ● 11 reports processed

1.4 Objective: Increase communication and celebrations of success.	**AAE** ● Parent Communication Forums held ○ Parents and Pastries 9/13 ○ Ethnic Studies Community Voice on 9/24 ○ IC messages weekly to parents ● Principal Preview weekly to staff ● Starting Capturing Kids Hearts Process Champions ● Parsec PD at TK - 12 staff meeting **NSLA** ● 25+ students will be celebrated on September 19 as they have achieved their goal of being "Reclassified Fluent English Proficient."
Goal 2: Ensure fiscal stability and pursue diverse external funding sources to support innovation.	
2.1 Objective: Expenditures will be aligned with LCAP goals and designated fund plans required by CDE/US Department of Education using restricted dollars first.	Finance has been working on closing the 23/24 school year budget. As the budget closing is finalized, we can identify what carryover is available for restricted programs. Budget managers are working through the plan and following the plan and submitting purchase requests for many items expressed in the LCAP. Finance worked with budget managers and their assistants to have access to our financial system to support their planning and implementation by being able to run financial reports when they are working with their teams and reviewing requests that are being requested by staff.
2.2 Objective: Identify and seek new funding opportunities to support student learning and enrichment outcomes. .	Finance continues to seek new funding opportunities with different grants. Finance also maintains proper reporting practices to ensure that we] meet the necessary requirements to continue receiving our State and Federal Categorical Funds. The GAVRT team continues to explore funding opportunities through NASA solicitations and other federal sources. Recently, the GAVRT project was awarded over $100,000 for the grant entitled "Monitoring Solar Activity During Solar Cycle 25 with the GAVRT Solar Patrol Science and Education Program."
2.3 Objective: The Foundation Board will raise funds annually to support the identified needs of LCER schools and programs.	The LCER Foundation is hosting its annual gala on September 28, 2024. The Golden Age Gala will be held at Fox Theater in Redlands. As of 8/30/24, we have secured $19,800 in sponsorships and ads. Our budgeted goal is $15K. Raffle items and baskets are also being collected. The event is officially sold out.
Goal 3: Provide support and onboarding for new and incoming staff, enhance staff performance, and align observations with desired student outcomes.	
3.1 Objective: Provide and monitor intentional and targeted support for new and experienced incoming staff. Some targeted support systems will include induction, professional development, mentoring, Capturing Kids Hearts, etc.	**AAE** ● The Multi-Tiered Systems of Support (MTSS) Team's focus has been on supporting teachers who need additional support. The TOA, Coordinators and Administration are offering individualized support for specific teachers and high-needs students. ● Administration and HR are in the process of setting up mentors and Induction coaches for beginning teachers ● The Academic Leadership Team (ALT) has continued to focus on teacher support ● The Curriculum, Instruction and Assessment (CIA) Team is now meeting twice a month. The effectiveness of summer professional development, new teacher support, and instructional support services were discussed this month.

	● MTSS has been focusing on supporting individual students and their teachers. ● Capturing Kids Hearts is having a huge impact on our teaching staff **NSLA** ● 1st new teacher check-in completed ○ California Standard for the Teaching Profession #2. Specific topics included: ■ Progressive discipline ■ Capturing Kids Hearts Integration **LCER** ● Both schools hosted Capturing Kids Hearts Level 1 training. LCER schools are going through the Campus by Design for Sustainability this school year for full CKH implementation. This process includes the following support: ● Process Champions: Both principals, Coordinator of Assessments and Programs, and CEO attended their monthly coaching calls. These coaching opportunities allow the principals to engage with other CKH principals across the nation to share best practices. The individual call with the CEO and Coordinator of Assessments and Programs allows time and space to ask questions about LCER's specific implementation and any issues we are experiencing. ● The 1st Traction Visits from our CKH coach is scheduled October 31st. The CKH Coach will work with the leadership team from both schools to discuss the status of implementation and plan the next steps. ● The second monthly newsletters will be sent to families and staff which included tips and additional resources. ● Both schools are relaunching Professional Learning Communities with their staff. The focus will be to improve communication across the organization and to have a greater emphasis on student learning outcomes. This should also improve engagement in ongoing school accountability efforts such as charter renewal, WASC, LCAP, etc. ● Induction Orientations scheduled for coaches and new teachers working to clear their credentials Sept 4, Sept 25, and Oct 15
3.2 Objective: Both school administration teams will conduct regular classroom walk throughs. Walk through data will be monitored by all levels of the professional learning community.	**AAE** ● 3 minute walk-throughs have been aligned to the California Standards of the Teaching Profession (CSTP standards) ○ 202 current walk-throughs have been completed **NSLA** ● The Curriculum, Instruction and Assessment (CIA) Team has continued to focus on refining the walk-through form and targeted feedback to our teachers.
3.3 Objective: Decrease staff vacancies at NSLA as compared to the prior year.	**2023-24 Vacancies at beginning of School Year** 7 Certificated, 13 Classified **2024-25 Vacancies at beginning of School Year** 2 Certificated, 3 Classified
Goal 4: Enhance the Lewis Center's brand development and marketing by expanding outreach, education, communication, and targeting a more diverse audience.	
4.1 Objective: Board and Executive Team will actively communicate	The Executive Team continues to be involved in multiple groups outside of LCER. David Gruber completed the statewide Chief Business Official certification course with California Charter School Development Center. Marcelo Congo serves on D/M SELPA's Steering

LCER's mission to the community partners that we serve.	Committee. He also participates in CASBO Small District CBO Roundtable and SBCSS Financial Managers group. Ryan Dorcey participates in the California IT in Education network. Ryan is also a member of San Bernardino County Superintendent of Schools Digital Learning Services communities including the Technology Leadership Network, EdTech Coaches Network, and Computer Science Equity Network. Stacy Newman is a member of CalChamber and participates in the SBCSS credentialing network. Lisa Lamb completed her term as the Board President for Greater High Desert Chamber of Commerce in June and continues to serve as Past President. She also serves on the CAHELP JPA Board with other high desert superintendents, the CSDC Advocacy Council, and SB County Sheriff Community Workgroup. She continues to facilitate the partnership between San Bernardino County Superintendent of Schools, Lewis Center and our sister school in Taiwan.
4.2 Objective: Increase ongoing communication with LCER stakeholders as evidenced by staff, parent and student satisfaction on annual surveys.	LCER has partnered with Parsec Real this year. This new service through Parsec will allow stakeholders (staff, students, families, and community members) to provide feedback via text, audio or video formats. The platform is easily accessible on any mobile device. Parsec's software will compile the feedback into themes that can be used by administration or PLC teams to make decisions on next steps. The first survey will be launched for students and staff in early August. NSLA is also partnering with World Savvy, a nonprofit education group focused on building global competencies for students across the U.S. They will be facilitating a number of stakeholder engagement sessions. The results of these sessions will be compiled into a Portrait of a Graduate. As this will be NSLA's first graduating class, the timing is critical to clearly define the school community's vision for the skills/competencies for each senior. The session outcomes will also be used to inform NSLA's WASC Self-Study, LCAP, and charter renewal.
Accomplishments and Highlights	We are sold out for the first time for our Annual Lewis Center Foundation Gala! We look forward to highlighting our Distinguished Award Honorees. Lisa Lamb and Erika Agosto are taking 8 LCER Ambassadors to World Savvy's "AI in Education" event at Google in San Jose on September 12.
Facilities Projects	**AAE** ● P-Restroom Remodel ○ We have signed a contract with Omega Design to be the Architect over the project ○ 3 weeks away to have a rough set of plans for the use of bidding ● Exterior Fitness Center ○ The concrete slab has been poured ○ Fitness equipment is 6 weeks on back order. Scheduled to be installed early October ● B-Bldg Remodel ○ We now have our C of O ● Install for the Kinder Playground is completed ● N-Bldg remodel is completed ● Scheduled to replace the flooring in the Art room from VCT to LVT over Fall break ● Remodeling the storage room behind the art room to be a new snack bar for food services. ○ Completed task ■ Added a rollup door and passenger door,hvac,lighting, and flooring ○ Still in progress ■ Water heater and sink, adding electrical outlets, installing appliances **NSLA** ● Projects completed over the summer break

	○ Installed artificial grass in the elementary play area ○ Exterior Fitness for Elementary ○ Exterior Fitness Center for MS & HS ○ Added exterior drains around the Admin office ○ Repairs for all the flood damage for the Admin office ● Building a new snack bar and storage room, from the ground up for Food Services ○ Currently working with Omega Design to create a set of plans
AAE Upcoming Dates	9/11 9/11 Ceremony 9/18 State of the County 9/20 Parents and Pastries 9/24 Ethnic Studies Zoom Community Voice with NSLA 9/25 NASA in Your Neighborhood in AAE Gym 9/28 Lewis Center Foundation's "Golden Age" Gala
NSLA Upcoming Dates	9/4 Active Shooter Training for Staff 9/6 PTOs Family Night at 66ers game 9/11 Cafecito 9/13 High School Spirit Rally 9/17 English Learners Advisory Committee meeting 9/18 School Site Council meeting 9/18 State of the County address 9/19 English Learners Reclassification Celebration 9/24 Lewis Center Ethnic Studies Community Input meeting via Zoom 9/25 Family Voices Safety Summit 9/27 High School Homecoming Dance 9/28 Lewis Center Foundation's "Golden Age" Gala
LCER Upcoming Dates	9/25/24 - NASA In Your Neighborhood, Jen Garrahy NASA SCaN Management 9/28/24 - Lewis Center Foundation's "Golden Age" Gala 11/09/24 - Noche de las Estrellas

2024-2025 GRANT TRACKING SHEET								
Grant	**Purpose/Description**	**Total Grant Amount**	**Direct Amount**	**Due Date**	**Date Submitted**	**Awarded?**	**Award Date**	**Grant Manager**
Monitoring Solar Activity during Solar Cycle '25 w/ the GAVRT Solar Patrol	Science and Ed. Program	$400,000.00	$40,000.00	NA	1/25/24	Yes		Dr. Marin Anderson, JPL
Burlington Grant	For ambassadors' trip to DC	$5,000.00	$5,000.00	8/27/24	8/22/24			Jisela Corona
US Bank	Field Trip - NSLA?			NA				Jisela Corona

The High Desert Partnership in Academic Excellence Foundation, Inc.
Check/Voucher Register - Board Report - 10K
From 8/1/2024 Through 8/31/2024

Effective Date	Check #	Vendor Name	Check Amount	Transaction Description
8/5/2024	52684	Carpet Corral	10,100.00	PO 2324-1864-AAE
8/5/2024	52694	SBCSS	31,826.78	NSAA PERS contributions for July
8/5/2024		SBCSS	89,837.38	LCER/AAE - PERS contributions for July
8/5/2024	52696	SISC	325,194.75	Health Coverage for August 2024
8/5/2024	52698	Top Notch Lunches	30,989.90	Lunch Program - June 2024
8/5/2024	52700	SBCSS	25,987.11	NSAA STRS contributions for July
8/5/2024		SBCSS	50,103.50	LCER/AAE - STRS contributions for July
8/8/2024	52706	US Bank	26,536.74	Account #4148-4400-7955-5648
8/15/2024	213		402,985.82	Group: 11mo Payroll; Pay Date: 8/15/2024
8/15/2024	214		270,637.53	Group: Payroll; Pay Date: 8/15/2024
8/15/2024	52727	SchoolsFirst Federal Credit	12,070.63	Employee TSA contributions - August 15,
8/16/2024	52733	AMT Systems	89,175.99	PO 2324-1805-NSLA
8/16/2024	52735	Blue Ally	38,160.00	PO 2425-0350-LCER
8/16/2024	52740	Capturing Kids Hearts	45,800.00	PO 2425-0030-LCER
8/20/2024	52764	Global CTI Group Inc.	21,360.19	PO 2324-1802-AAE
8/20/2024	52767	Illuminate Education, Inc	20,703.96	PO 2425-0374-LCER
8/20/2024	52769	Infinite Campus	60,507.80	PO 2425-0268-LCER
8/20/2024	52772	JAMF Software	20,040.00	PO 2425-0300-LCER
8/20/2024	52786	Parsec Education Inc.	14,055.00	PO 2425-0301-LCER
8/20/2024		Parsec Education Inc.	14,850.00	PO 2425-0302-NSLA
8/20/2024	52789	Rockley Family Foundation	12,324.64	PO 2324-1998-NSLA
8/20/2024	52798	Waxie Sanitary Supply	10,069.22	Account #19979 3
8/20/2024	52799	Wells Fargo Vendor Fin Serv	10,608.27	Contract #450-0004712-000
8/21/2024	52804	Southern California Edison	19,651.60	Account #700119778270
8/21/2024		Southern California Edison	19,983.50	Account #700281016926
8/23/2024	52829	Data Recognition Corp.	301,599.50	PO 2425-0377-NSLA
8/23/2024	52830	Dave Bang Associates, Inc.	11,110.90	PO 21324-1721-AAE
8/23/2024	52834	Dr. Jose Medina Educational So	14,000.00	PO 2425-0500-NSLA
8/27/2024	52857	Liberty Utilities	12,579.70	Account #200006543934
8/27/2024	52858	CharterSAFE	70,997.00	Insurance Premium - September
8/29/2024	52897	Liberty Utilities	10,434.49	Account #200006543900
8/29/2024	52910	S.W. Roberts Construction	18,880.00	Final Payment, Snack Bar Door
8/29/2024	52918	Wells Fargo Vendor Fin Serv	11,113.72	Contract #450-0004712-000
8/30/2024	215		331,715.50	Group: Payroll; Pay Date: 8/30/2024
8/30/2024	216		375,183.81	Group: 11mo Payroll; Pay Date: 8/30/2024
8/30/2024	52924	Conco Construction	51,573.32	PO 2324-1313-AAE Final
Report Total			2,882,748.25	

All Funds - Budget Comparison 2023/24 to 2024/25

2023-2024

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Revised	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	46,022,881	7,670,480	38,352,401	83.33%
Expense				
Certificated Salaries	16,036,227	1,624,369	14,411,858	89.87%
Classified Salaries	6,630,642	826,891	5,803,751	87.53%
Benefits	9,074,174	960,379	8,113,795	89.42%
Books and Supplies	3,750,636	680,190	3,070,446	81.86%
Services & Other	8,480,569	1,021,445	7,459,124	87.96%
Capital Outlay	1,185,000	293,723	891,277	75.21%
Other Outgo	0	0	0	N/A
Share of LCER	0	0	0	N/A
Total Expense	**45,157,248**	**5,406,997**	**39,750,251**	**88.03%**
Add (Subtract) to Reserves	**865,633**	**2,263,484**	**(1,397,851)**	
Total Revenue	**46,022,881**	**7,670,480**	**38,352,401**	16.67%
Total Expense	**45,157,248**	**5,406,997**	**39,750,251**	11.97%
Add (Subtract) to Reserves	865,633	2,263,484	-1,397,851	

2024-2025

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Original	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	46,010,580	5,137,571	40,873,009	88.83%
Expense				
Certificated Salaries	9,707,097	1,727,106	7,979,991	82.21%
Classified Salaries	6,489,834	878,869	5,610,965	86.46%
Benefits	9,265,444	1,027,657	8,237,787	88.91%
Books and Supplies	3,048,615	749,670	2,298,945	75.41%
Services & Other	13,885,419	1,058,717	12,826,702	92.38%
Capital Outlay	485,000	256,016	228,984	47.21%
Other Outgo	0	0	0	N/A
Share of LCER	0	0	0	N/A
Total Expense	**42,881,409**	**5,698,034**	**37,183,375**	**86.71%**
Add (Subtract) to Reserves	**3,129,171**	**(560,463)**	**3,689,634**	
Total Revenue	**46,010,580**	**5,137,571**	**40,873,009**	11.17%
Total Expense	**42,881,409**	**5,698,034**	**37,183,375**	13.29%
Add (Subtract) to Reserves	3,129,171	-560,463	3,689,634	

AAE - Budget Comparison 2021/22 to 2022/23

2023-2024

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Revised	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	21,546,156	594,726	20,951,430	97.24%
Expense				
Certificated Salaries	7,814,721	770,825	7,043,896	90.14%
Classified Salaries	2,129,781	258,263	1,871,518	87.87%
Benefits	3,888,061	391,399	3,496,662	89.93%
Books and Supplies	1,414,361	439,725	974,636	68.91%
Services & Other	2,462,212	272,540	2,189,672	88.93%
Capital Outlay	900,000	293,723	606,277	67.36%
Other Outgo	0	0	0	N/A
Share of LCER	2,797,290	466,215	2,331,075	83.33%
Total Expense	**21,406,426**	**2,892,691**	**18,513,735**	**86.49%**
Add (Subtract) to Reserves	**139,730**	**(2,297,965)**	**2,437,695**	
Total Revenue	**21,546,156**	**594,726**	**20,951,430**	2.76%
Total Expense	**21,406,426**	**2,892,691**	**18,513,735**	13.51%
Add (Subtract) to Reserves	139,730	-2,297,965	2,437,695	

2024-2025

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Original	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	21,538,855	2,703,578	18,835,277	87.45%
Expense				
Certificated Salaries	7,982,661	799,605	7,183,056	89.98%
Classified Salaries	2,157,986	260,585	1,897,401	87.92%
Benefits	3,981,689	408,141	3,573,548	89.75%
Books and Supplies	1,377,811	229,413	1,148,399	83.35%
Services & Other	4,757,450	370,626	4,386,824	92.21%
Capital Outlay	440,000	140,981	299,019	67.96%
Other Outgo	0	0	0	N/A
Share of LCER	2,797,290	466,215	2,331,075	83.33%
Total Expense	**23,494,887**	**2,675,566**	**20,819,321**	**88.61%**
Add (Subtract) to Reserves	**(1,956,032)**	**28,012**	**(1,984,044)**	
Total Revenue	**21,538,855**	**2,703,578**	**18,835,277**	12.55%
Total Expense	**23,494,887**	**2,675,566**	**20,819,321**	11.39%
Add (Subtract) to Reserves	-1,956,032	28,012	-1,984,044	

NSLA - Budget Comparison 2021/22 to 2022/23

2023-2024

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Revised	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	24,279,735	706,045	23,573,690	97.09%
Expense				
Certificated Salaries	7,257,142	691,016	6,566,126	90.48%
Classified Salaries	2,225,732	239,487	1,986,245	89.24%
Benefits	3,622,851	337,796	3,285,055	90.68%
Books and Supplies	2,158,775	198,051	1,960,724	90.83%
Services & Other	5,491,254	679,873	4,811,381	87.62%
Capital Outlay	265,000	0	265,000	100.00%
Other Outgo	0	0	0	N/A
Share of LCER	2,624,019	437,337	2,186,683	83.33%
Total Expense	**23,644,773**	**2,583,559**	**21,061,214**	**89.07%**
Add (Subtract) to Reserves	**634,962**	**(1,877,514)**	**2,512,476**	
Total Revenue	**24,279,735**	**706,045**	**23,573,690**	2.91%
Total Expense	**23,644,773**	**2,583,559**	**21,061,214**	10.93%
Add (Subtract) to Reserves	634,962	-1,877,514	2,512,476	

2024-2025

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Original	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	24,279,735	2,405,034	21,874,701	90.09%
Expense				
Certificated Salaries	758,960	762,288	(3,328)	-0.44%
Classified Salaries	1,988,367	270,052	1,718,315	86.42%
Benefits	3,696,289	380,389	3,315,900	89.71%
Books and Supplies	1,610,765	517,167	1,093,598	67.89%
Services & Other	8,486,450	589,522	7,896,928	93.05%
Capital Outlay	25,000	115,035	(90,035)	-360.14%
Other Outgo	0	0	0	N/A
Share of LCER	2,624,019	437,337	2,186,683	83.33%
Total Expense	**19,189,850**	**3,071,790**	**16,118,060**	**83.99%**
Add (Subtract) to Reserves	**5,089,885**	**(666,756)**	**5,756,641**	
Total Revenue	**24,279,735**	**2,405,034**	**21,874,701**	9.91%
Total Expense	**19,189,850**	**3,071,790**	**16,118,060**	16.01%
Add (Subtract) to Reserves	5,089,885	-666,756	5,756,641	

LCER - Budget Comparison 2021/22 to 2022/23

2023-2024

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Revised	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	196,990	17,434	179,556	91.15%
Expense				
Certificated Salaries	964,364	162,528	801,836	83.15%
Classified Salaries	2,275,129	329,141	1,945,988	85.53%
Benefits	1,563,262	231,184	1,332,078	85.21%
Books and Supplies	177,500	42,414	135,086	76.11%
Services & Other	527,103	69,032	458,071	86.90%
Capital Outlay	20,000	0	20,000	100.00%
Other Outgo	0	0	0	N/A
Share of LCER	(5,421,309)	(903,552)	(4,517,758)	
Total Expense	**106,049**	**(69,253)**	**175,302**	**165.30%**
Add (Subtract) to Reserves	**90,941**	**86,687**	**4,254**	
Total Revenue	**196,990**	**17,434**	**179,556**	8.85%
Total Expense	**106,049**	**-69,253**	**175,302**	-65.30%
Add (Subtract) to Reserves	90,941	86,687	4,254	

2024-2025

Note - Revenue Reported is % of Budgeted Revenue Earned	Total Budget $ - Original	Current Period Actual thru August	Remaining Budget	Percent Remaining
Revenue		Annual Budgeted Revenue		
Revenue	191,990	28,960	163,030	84.92%
Expense				
Certificated Salaries	965,476	165,213	800,263	82.89%
Classified Salaries	2,343,481	348,232	1,995,249	85.14%
Benefits	1,587,466	239,127	1,348,339	84.94%
Books and Supplies	60,039	3,091	56,948	94.85%
Services & Other	641,519	98,569	542,950	84.64%
Capital Outlay	20,000	0	20,000	100.00%
Other Outgo	0	0	0	N/A
Share of LCER	(5,421,309)	(903,552)	(4,517,758)	83.33%
Total Expense	**196,672**	**(49,321)**	**245,993**	**125.08%**
Add (Subtract) to Reserves	**(4,682)**	**78,281**	**(82,963)**	
Total Revenue	**191,990**	**28,960**	**163,030**	15.08%
Total Expense	**196,672**	**-49,321**	**245,993**	-25.08%
Add (Subtract) to Reserves	-4,682	78,281	-82,963	

Foundation Savings - 4100005285
2023-24
As of 7/31/24

Description	Beginning Balance	Debit	Credit	Interest	Ending Balance
AAE Capital Campaign	$78,284.55			49.27	$ 78,333.82
NSLA Capital Campaign	$1,239.54			0.00	$ 1,239.54
Davis Scholarship Endowment	$13,169.92			7.88	$ 13,177.80
Global and Local Programs	$17,267.56			7.88	$ 17,275.44
HiDAS Endowment	$57,560.55			35.48	$ 57,596.02
Scholarships	$24,303.81			21.68	$ 24,325.49
Unrestricted	$120,194.96	$15,930.55		74.89	$ 104,339.31
TOTAL					**$ 296,287.42**

Restricted Scholarship Funds					
AAE Staff Scholarship	$0.00				$0.00
Bud Biggs Memorial Scholarship	$289.62				$289.62
GSA Club Scholarship	$1,450.00				$1,450.00
Mike Mangold Scholarship	$2,250.00				$2,250.00
Rick Piercy Scholarship	$270.00				$270.00
Sandra Perea Scholarship	$2,535.00				$2,535.00
Total Unrestricted Scholarship Funds	**$17,658.45**				**$17,530.87**

Restricted AAE Capital Campaign Funds					
High Desert Turtle and Tortoise Club	$2,500.00				$2,500.00
AAE Gym Weight Room	$2,150.00				$2,150.00
Watertower, Gristmill, Shade Structures	$25,060.39				$25,060.39
Total Unrestricted AAE Capital Campaign	**$49,040.60**				**$48,623.43**

Global and Local Program Funds					
Chile Exchange	$10,694.28			7.88	$10,702.16
Destination Imagination	$6,573.28				$6,573.28
Total Global and Local Programs	**17267.5604**				**$17,275.44**

LEWIS CENTER FOUNDATION
COMBINED BALANCE SHEET AND INCOME STATEMENT
July 1 - July 31 , 2024

CHECKING (LEWIS CENTER FOUNDATION)

Beginning Balance			**$16,766.33**
Revenue			
Transfer from Savings - Unrestricted	$14,162.37		
Gala Tickets and Sponsors	$2,810.09		
Online donation to AAE Staff Scholarship	$9.92		
Online donations to Unrestricted	$157.02		
Interest	$ 0.13		
Total	$17,139.53		
Expenditure			
VVC - Piercy Scholarships	$ 5,000.00		
Cal Baptist - Peacock/Casillas Scholarship	$ 500.00		
Visa - $332.73 Employee Recognition, $109.36 Gala, $162.15 Unrestricted + credit	$ 227.08		
The Master's University - Perea Scholarship	$ 1,000.00		
Total	$ 6,727.08		
Ending Balance		*Total*	**$27,178.78**

SAVINGS (LEWIS CENTER FOUNDATION)

Beginning Balance			
Restricted Funds - AAE Capital Campaign			$ 78,284.55
Restricted Funds - NSLA Capital Campaign			$ 1,239.54
Restricted Funds - Davis Endowment			$ 13,169.92
Restricted Funds - Global and Local Programs			$ 17,267.56
Restricted Funds - HiDAS Endowment			$ 57,560.54
Restricted Funds - Scholarships			$ 24,303.81
Unrestricted Funds			$ 120,194.97
			$ 312,020.88
Revenue			
Interest	$ 197.09		
Total	$197.09		
Expenditure			
Bloomerang Fee 2023-24	$ 1,768.18		
Transfer to Checking - Unrestricted	$ 14,162.37		
Total	$ 15,930.55		
Ending Balance			
Restricted Funds - AAE Capital Campaign			$ 78,333.82
Restricted Funds - NSLA Capital Campaign			$ 1,239.54
Restricted Funds - Davis Endowment			$ 13,177.80
Restricted Funds - Global and Local Programs			$ 17,275.44
Restricted Funds - HiDAS Endowment			$ 57,596.02
Restricted Funds - Scholarships			$ 24,325.49
Unrestricted Funds			$ 104,339.31
		Total	**$ 296,287.42**
Total Checking and Savings			**$323,466.20**

Lewis Center for Educational Research

$40,895,000
California Enterprise Development Authority
Charter School Revenue Bonds
(Norton Science and Language Academy Project)
Tax-Exempt Series 2020
CUSIP: 13069A AG3

$5,500,000
California Enterprise Development Authority
Charter School Revenue Bonds
(Norton Science and Language Academy Project)
Tax-Exempt Series 2021
CUSIP: 13069A AQ1

Quarterly Report – June 30, 2024

Campanile Group, Inc.

This report has been prepared by Campanile Group, Inc., at the direction of the Borrower. The information set forth herein has been furnished by the Borrower, along with other sources believed to be reliable, but no representation as to the accuracy or completeness of any such information is made by the Campanile Group, Inc.

1. Unaudited Financial Statements and Other Financial Information

Unaudited financial statements and other financial information, including a statement of revenues and expenses and a statement of revenues and expenses and a balance sheet, each in comparative form, to the extent practicable, with the financial figures from the corresponding period in the preceding Fiscal Year.

The unaudited financial statements and other financial information are provided in Appendix I.

2. Student Enrollment

The student enrollment number for the most recently completed quarter.

The student enrollment for the fiscal quarter ending June 30, 2024 is provided in Appendix II.

3. Budget (Required for June 30 Report)

The Quarterly Report for each quarter ending June 30 shall include a copy of the proposed annual operating budget for the School for the succeeding Fiscal Year as submitted to the California Department of Education.

The budget for fiscal year 2024-25 is provided in Appendix III.

4. Quarterly Report Certificate

A Quarterly Report Certificate in the form as Exhibit B.

The Quarterly Report Certificates are provided in Appendix IV.

5. Notice of Charter Non-Compliance

Unless previously disseminated, the next Quarterly Report to be disseminated shall contain a copy or complete description of any notice, report or communication with respect to charter non-compliance that would allow the Lessee's charter authorizer to begin any process or proceedings toward charter revocation or which indicate an intent not to renew any such charter.

None.

Appendix I

Unaudited Financial Statements and Other Financial Information

Norton Science and Language Academy

Statement of Financial Position
As Of June 30, 2024

	July 1, 2023	June 30, 2024
ASSETS		
Current Assets		
Cash and Cash Equivalents	$ 9,825,328	$ 9,777,510
Cash held in Trust	$ -	-
Accounts Receivable	3,533,334	4,187,555
Intracompany Receivable	-	-
Laptop Lease Receivable	-	-
Laptop Inventory	-	-
Prepaid Expenses	70,092	185,287
Total Current Assets	13,428,754	14,150,352
Non-Current Asset		
Lease Payment Receivable - Long Term	-	-
Right of Use, Operating Lease	157,555	157,555
Right of Use, Finance Lease	42,957,586	42,957,586
Unamortized Debt Issuance Costs	-	-
Total Non-Current Assets	43,115,141	43,115,141
Capital Assets		
Non-depreciable Assets	42,802	42,802
Depriciable Assets	351,742	1,033,852
Accumulated Depreciation	(118,996)	(141,750)
Total Capital Assets	275,548	934,903
TOTAL ASSETS	56,819,443	58,200,396
LIABILITIES AND NET ASSETS		
LIABILITIES		
Current Liabilities		
Current Portion of Long Term Liabilities	-	-
Accrued Payroll and Payroll Expenses	35,730	7,841
Line of Credit	-	-
Accounts Payable	291,654	605,843
Deferred Revenue	438,220	232,211
Due to Government Grantor	302,274	302,274
Operating lease libility, current portion	34,100	34,100
Finance lease liability, current portion	320,000	320,000
Due to Student Groups	-	-
Total Current Liabilities	1,421,978	1,502,269
Non-Current Liabilities		
Operating Lease Liability, Net Current portion		
Finance lease liability, net of current portion		
Long Term Liabilities		
Interest Rate Swap Agreement	-	-
Voluntery Retirement & OPEB, Less Current Portion	-	-
Laptop Capital Lease Payments Less Current Portion	-	-
Loans Payable, Less Current Portion	123,455	123,455
Finance lease liability, net of current portion	45,770,000	45,770,000
Total Long-Term Liabilities	45,893,455	45,893,455
TOTAL LIABILITIES	47,315,433	47,395,724
NET ASSETS		
Unrestricted	9,504,009	10,804,672
Temporarily Restricted	-	0
Permanently Restricted	-	-
TOTAL NET ASSETS	9,504,009	10,804,672
TOTAL LIABILITIES AND NET ASSETS	56,819,443	58,200,396

Norton Science and Language Academy

Statement of Activities
For the 4th Qtr June 30, 2024

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
REVENUES, GAINS, AND OTHER SUPPORT				
Federal Special Education		$ 241,226		$ 241,226
National School Lunch		$ 613,952		613,952
Other Federal Revenues	-	1,254,600		1,254,600
State General Purpose Apportionment	14,252,630			14,252,630
District In-Lieu Property Tax	35,620			35,620
Education Protection Account	1,648,832			1,648,832
Lottery	229,161	132,577		361,738
State Special Education		642,317		642,317
One Time Funding	24,173			24,173
Other State Revenues	2,027,386	1,331,849		3,359,235
Donations	1,102	-		1,102
Donations - In-Kind		-		-
Student Activities	-			-
Class Fees	-			-
Food Services	-	268,110		268,110
Other Local Revenues	116,005	-		116,005
Interest Earned	60,244	-	-	60,244
Transfers	(530,103)			(530,103)
Net Assets Released From Restrictions:				
	-	-		-
Other Federal Restricted Funds	1,254,600	(1,254,600)		-
Lottery	132,577	(132,577)		-
Other State Funds	1,331,849	(1,331,849)		-
Special Education	883,543	(883,543)		-
Food Services	882,062	(882,062)		-
Restricted Cash Donations	-	-		-
Restricted In-Kind Donations	-	-		-
REVENUES, GAINS, AND OTHER SUPPORT	22,349,680	0	-	22,349,680
EXPENSES				
Certificated Salaries	7,010,642			7,010,642
Classified Salaries	2,006,910			2,006,910
Benefits	3,188,647			3,188,647
Total Salaries and Benefits	12,206,199			12,206,199
Books and Supplies	1,803,772			1,803,772
Services, Other Operating Expenses	4,928,073			4,928,073
Management Fee	2,025,965			2,025,965
Free Use of Facilities - Apple Valley School District	-			-
Capital Outlay	62,255			62,255
Debt Service	-			-
Amortization of Bond Cost	-			-
Depreciation	22,754			22,754
Total Expenditures	21,049,017	-	-	21,049,017
Net Change in Assets from Operations	1,300,663	0	-	1,300,663
Net Assets Beginning of Year as originally stated	9,504,009	-	-	9,504,009
Unrealized gain/(loss) on Interest Rate Swap	-	-	-	-
Net Assets Beginning of Year, as restated	9,504,009	-	-	9,504,009
Net Assets End of Year	10,804,672	0	-	10,804,672

Norton Science & Language Academy

As of 4/1/2024 - 6/30/2024

		Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Revenue						
Revenue						
Revenue	4000	10,268,805.41	22,819,539.16	24,223,077.00	1,403,537.84	22,564,330.01
Revenue - Interest	4100	21,199.31	60,243.99	52,000.00	9,920.24	35,527.50
Transfers Received	4990	(530,103.46)	(530,103.46)	0.00	530,103.46	(313,416.45)
Total Revenue		9,759,901.26	22,349,679.69	24,275,077.00	1,943,561.54	22,286,441.06
Total Revenue		9,759,901.26	22,349,679.69	24,275,077.00	1,943,561.54	22,286,441.06
Expenditures						
Cert Salaries						
Foundation Bonus	5000	0.00	100.00	0.00	(100.00)	0.00
Certificated Salaries	5100	1,665,259.06	6,228,538.51	6,757,361.00	528,822.49	5,172,305.60
Cert - Hourly	5102	12,324.85	28,090.00	39,000.00	10,910.00	45.00
Cert - Subs	5103	151,244.00	422,499.89	430,550.00	8,050.11	372,681.34
Cert - Supplemental	5104	87,771.64	181,658.82	200,649.00	18,990.18	198,256.40
Cert - Stipend	5105	64,028.33	128,479.63	137,400.00	8,920.37	70,269.15
Cert - OT	5106	6,115.34	21,275.08	25,000.00	3,724.92	17,438.17
Total Cert Salaries		1,986,743.22	7,010,641.93	7,589,960.00	579,318.07	5,830,995.66
Class Salaries						
Classified Salaries	5110	135,781.93	551,041.48	551,085.00	43.52	482,190.97
Class - Hourly	5112	286,528.10	1,115,704.87	1,118,459.00	2,754.13	756,978.59
Class - Subs	5113	58,990.80	188,857.11	190,600.00	1,742.89	91,679.28
Class - Supplemental	5114	44,374.66	110,982.40	109,248.00	(1,734.40)	84,151.92
Class - Stipend	5115	1,053.82	5,084.80	0.00	(5,084.80)	7,934.40
Class - OT	5116	10,417.54	35,239.57	18,975.00	(16,264.57)	22,360.12
Total Class Salaries		537,146.85	2,006,910.23	1,988,367.00	(18,543.23)	1,445,295.28
Benefits						
Employee Benefits	5200	259,762.87	956,121.42	1,254,576.00	298,454.58	858,934.10
STRS	5201	339,017.67	1,197,625.49	1,382,631.00	185,005.51	999,369.05
PERS	5202	172,858.10	651,016.66	656,495.00	5,478.34	427,428.85
Apple Retirement	5203	2,426.30	7,242.05	8,000.00	757.95	4,900.99
SS Classified	5204	41,457.31	155,623.47	155,798.00	174.53	109,938.41
Medicare	5205	35,701.72	127,257.90	138,887.00	11,629.10	103,414.77
SUI Classified	5208	1,262.11	4,516.24	4,790.00	273.76	36,371.55
Workers Comp	5209	24,759.81	89,243.28	95,112.00	5,868.72	101,861.89
Total Benefits		877,245.89	3,188,646.51	3,696,289.00	507,642.49	2,642,219.61
Supplies						
Approved Text Books	5300	5,697.34	213,445.33	373,754.00	160,308.67	184,791.03
Classroom Books	5301	1,460.78	32,937.96	55,922.00	22,984.04	57,739.37
Class Supplies	5320	36,492.94	83,695.65	50,985.00	(32,710.65)	128,387.12
Other Supplies	5322	67,535.00	228,583.49	88,080.00	(140,503.49)	253,071.08
Equipment (under 5K)	5325	2,291.99	24,867.06	34,000.00	9,132.94	1,407.16
Reimbursables	5327	0.00	7,770.24	0.00	(7,770.24)	66,023.79
Food	5360	288,421.66	664,197.31	800,000.00	135,802.69	514,150.64
Office Supplies	5530	13,470.19	37,511.92	26,774.00	(10,737.92)	26,606.43
Postage	5540	2,290.79	5,601.68	0.00	(5,601.68)	0.00
Computers	6210	20,317.34	304,693.82	78,500.00	(226,193.82)	172,717.97
Software	6220	27,507.01	159,567.10	91,750.00	(67,817.10)	135,521.59
Furniture	6230	11,632.78	36,177.18	6,000.00	(30,177.18)	447,006.24
Books, Media, Library	6240	0.00	4,722.96	5,000.00	277.04	0.00

Norton Science & Language Academy

As of 4/1/2024 - 6/30/2024

	Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Total Supplies	477,117.82	1,803,771.70	1,610,765.00	(193,006.70)	1,987,422.42

Norton Science & Language Academy

As of 4/1/2024 - 6/30/2024

		Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Services						
Employee Admin	5220	1,055.60	2,886.60	1,500.00	(1,386.60)	2,560.92
Testing	5331	58.04	5,950.18	28,500.00	22,549.82	8,866.10
Referees	5340	2,000.00	10,845.00	12,500.00	1,655.00	4,444.00
Field Trip	5350	33,711.77	145,897.45	65,000.00	(80,897.45)	24,117.02
Travel	5400	1,156.41	3,411.72	2,500.00	(911.72)	5,136.01
Training and Conferences	5410	66,840.22	177,603.72	116,860.00	(60,743.72)	148,063.02
Other Services	5412	4,398.83	35,856.93	11,000.00	(24,856.93)	5,179.00
Dues and Memberships	5420	36,304.00	50,588.51	14,000.00	(36,588.51)	37,433.70
S B Co Fees	5422	253,012.02	255,162.02	275,609.00	20,446.98	143,179.64
LCER Management Fee	5423	2,025,615.00	2,025,965.00	2,136,050.00	110,085.00	1,754,982.00
Banking fees	5425	(0.07)	(0.07)	2,200.00	2,200.07	0.00
Insurance	5430	0.00	145,489.40	300,000.00	154,510.60	169,833.96
Legal Fees	5440	3,365.50	33,511.50	6,500.00	(27,011.50)	7,126.50
Consulting	5441	46,867.50	137,023.48	76,500.00	(60,523.48)	166,400.78
Consulting/Sub Agreements	5442	250,498.12	261,550.12	1,462,500.00		0.00
Trash-Sewer	5460	21,960.23	70,719.02	60,000.00	(10,719.02)	57,154.92
Gardening	5470	7,460.09	18,224.86	12,500.00	(5,724.86)	41,895.38
Janitorial	5480	23,484.09	96,023.67	107,500.00	11,476.33	70,558.31
Pest Control	5490	508.02	2,471.32	3,000.00	528.68	1,582.20
Security	5500	0.00	(2,150.06)	114,000.00	116,150.06	75,682.60
Telephone	5510	(30,884.28)	(5,826.59)	53,100.00	58,926.59	50,850.44
Utilities	5520	(162.40)	7,027.06	200,000.00	192,972.94	19,161.62
Copier	5531	16,683.55	58,766.64	48,256.00	(10,510.64)	21,590.72
Emergency-First Aid	5532	3,162.40	11,597.34	12,000.00	402.66	5,638.93
Bank Fees	5533	0.00	2,500.00	0.00	(2,500.00)	2,500.00
Rental - Leases	5550	785,379.30	3,122,081.46	3,096,875.00	(25,206.46)	(109,422.86)
Advertising - Marketing	5561	6,218.10	6,950.98	15,000.00	8,049.02	1,919.48
Public Relations	5562	4,515.57	11,727.56	15,000.00	3,272.44	7,521.16
Special Events	5563	4,476.53	7,018.52	25,000.00	17,981.48	16,692.01
Facilities - Maintenance	6010	38,324.06	83,735.23	100,000.00	16,264.77	60,200.58
Bus	6115	48,618.29	133,445.76	20,000.00	(113,445.76)	22,582.58
Equipment Repairs	6205	825.00	37,983.42	93,000.00	55,016.58	20,332.03
Total Services		3,655,451.49	6,954,037.75	8,486,450.00	331,462.37	2,843,762.75
Capital Exp						
Construction	5600	(62,254.86)	0.00	0.00	0.00	(128,995.27)
Sites - Improvements of Site	6000	(348,292.18)	0.00	0.00	0.00	0.00
Building -Improvements of Bldg	6100	(221,928.64)	0.00	0.00	0.00	0.00
Capital Equipment (over 5 K)	6200	(111,888.53)	0.00	0.00	0.00	0.00
Total Capital Exp		(744,364.21)	0.00	0.00	0.00	(128,995.27)
Debt Service						
Interest Expense	5571	0.00	0.00	0.00	0.00	2,777,117.00
Depreciation	6900	5,688.47	22,753.88	25,000.00	2,246.12	25,673.17
Amortization	6910	0.00	0.00	0.00	0.00	1,215,425.00
Total Debt Service		5,688.47	22,753.88	25,000.00	2,246.12	4,018,215.17
Total Expenditures		6,795,029.53	20,986,762.00	23,396,831.00	1,209,119.12	18,638,915.62
Revenue and Expense		2,964,871.73	1,362,917.69	878,246.00	734,442.42	3,647,525.44

Norton Science and Language Academy

Statement of Cash Flows
For the 4th Qtr June 30, 2024

CASH FLOWS FROM OPERATING ACTIVITIES	
Change in Net Assets	$ 1,300,663
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities	
Depreciation and Amortization	22,754
Unrealized loss/(gain) on interest rate swap	-
(Increase) Decrease in operating assets:	
Accounts Receivable	(654,221)
Stores Inventory	-
Prepaid Expense	(115,195)
Intercompany receivables	
Increase (Decrease) in operating lisbilities:	
Current portion of loans payable	
Accrued Payroll and Payroll Expenses	(27,889)
Accounts Payable	314,188
Deferred Revenue	(206,009)
Due to Government Grantor	-
Due to Student Groups	-
Net Cash Provided by Operating Activities	634,292
CASH FLOWS FROM INVESTING ACTIVITIES	
Purchase of Equipment, Furniture and Building Improvements	(682,109)
Net Cash Used by Investing Activities	(682,109)
CASH FLOWS FROM FINANCING ACTIVITIES	
Proceeds from Line of Credit	-
Additional Bond Issuance Cost	-
Additional Apple Lease	-
Payments on Outstanding Loans	-
Net Cash Used by Financing Activities	-
Net Increase in Cash	(47,818)
BEGINNING CASH	9,825,328
ENDING CASH	9,777,510
Days Cash on Hand	**187.60**

Appendix II

Student Enrollment

Norton Science & Language Academy

Enrollment
As of 6/30/2024

Grade Level	Count
TK	48
K	100
1	100
2	101
3	100
4	100
5	98
6	126
7	116
8	119
9	73
10	41
11	52
Total	1174

Appendix III

FY 2024-25 Budget

NSLA 2024-2025 Annual Budget

#	Title	Revenue Unrestricted	Restricted	Total
2000	ADA/LCFF	9,573,850.00	-	9,573,850.00
2000.1	Property Tax	-	-	-
2000.5	LCFF Supplemental	2,139,678.00	-	2,139,678.00
2000.7	LCFF Concentration	2,262,252.00	-	2,262,252.00
2001	Education Protection Act	3,681,629.00	-	3,681,629.00
2002	Lottery	220,348.00	-	220,348.00
2002.1	Lottery - Res. 6300	-	89,633.00	89,633.00
2003	Special Needs	-	680,018.00	680,018.00
	Special Needs-Mental Health Svc	-	89,035.00	89,035.00
20031	Special Needs-Fed	-	241,226.00	241,226.00
	Mandate Block Grant	27,989.00	-	27,989.00
	MAA	40,000.00	-	40,000.00
2009	Cafeteria - Local	-	-	-
2010	Cafeteria - Federal	-	730,852.00	730,852.00
2011	Cafeteria - State	-	291,603.00	291,603.00
2600	ELO - ASP/Summer Academy	-	1,620,892.00	1,620,892.00
	SB740	1,600,000.00	-	1,600,000.00
2505	Title I	-	288,371.00	288,371.00
2515	Title II	-	40,899.00	40,899.00
2520	Title III	-	43,595.00	43,595.00
2530	Title IV	-	23,006.00	23,006.00
7435	Learning Recovery Emergency	-	348,852.00	348,852.00
6770	Prop 28 Grant	-	189,349.00	189,349.00
	Interest	52,000.00	-	52,000.00
	Donations	-	-	-
	Class Funds	-	-	-
6800	ROTC	-	-	-
	Total Revenue	**19,597,746.00**	**4,677,331.00**	**24,275,077.00**

Set-asides/Transfers Title	Unrestricted	Restricted	Total
Reserves - 1.5%	267,861	-	267,861
SPED Contribution	-	225,373	225,373
Food Services Contribution	-	61,640	61,640
STEM ELOP	-	2,350	2,350
Contributing Support	291,848	-	291,848
Nursing Contribution	29,174	-	29,174
Grand Total Revenue	**19,008,863.00**	**4,387,968.00**	**23,396,831.00**
			21,260,781.00

NSLA Salaries

	Unrestricted Programs NSLA General	Stipends	Athletics	IT	Facilities	SPED	Restricted Programs LREBG	ELOP	Prop 28	Food Services	Title I	Title II/Class PD	Title III	Title IV	Total
Certificated	6,077,104.00	-	-	-	-	806,919.00	-	-	93,860.00	-	79,478.00	-	-	-	7,057,361.00
Certificated Hourly	25,000.00	-	-	-	-	-	-	-	-	-	14,000.00	-	-	-	39,000.00
Certificated Substitute	305,550.00	-	-	-	-	10,000.00	-	-	-	-	-	-	-	-	315,550.00
Certificated Suplemental	30,000.00	-	-	-	-	15,409.00	-	49,000.00	-	-	-	-	6,240.00	-	100,649.00
Certificated Stipends	4,000.00	40,000.00	3,500.00	-	-	-	-	-	-	-	4,000.00	25,900.00	-	-	77,400.00
Certificated OT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Classified	360,512.00	-	-	62,698.00	94,284.00	100,988.00	-	23,603.00	-	-	-	-	-	-	642,085.00
Classified Hourly	699,111.00	-	-	-	88,445.00	158,438.00	-	24,661.00	35,639.00	94,548.00	124,217.00	-	5,900.00	-	1,230,959.00
Classified Substitute	20,600.00	-	-	-	10,000.00	-	-	-	-	-	-	-	-	-	30,600.00
Classified Suplemental	23,400.00	-	-	-	-	5,848.00	-	-	-	-	-	-	-	-	29,248.00
Classified Stipend	-	-	47,500.00	-	-	-	-	-	-	-	-	-	-	-	47,500.00
Classified OT	3,000.00	-	-	-	4,975.00	-	-	-	-	-	-	-	-	-	7,975.00
Employee Benefits	1,071,624.00	-	-	8,157.00	30,076.00	142,306.00	-	10,923.00	21,847.00	-	21,643.00	-	-	-	1,306,576.00
STRS	1,173,304.00	7,640.00	669.00	-	-	158,975.00	-	9,359.00	17,927.00	-	18,618.00	4,947.00	1,192.00	-	1,392,631.00
PERS	379,329.00	-	12,849.00	16,960.00	52,133.00	71,757.00	-	13,055.00	9,640.00	25,575.00	33,601.00	-	1,596.00	-	616,495.00
Social Security	87,130.00	-	2,945.00	3,887.00	12,258.00	16,447.00	-	2,992.00	2,210.00	5,862.00	7,701.00	-	366.00	-	141,798.00
Medicare	109,450.00	580.00	740.00	909.00	2,867.00	15,915.00	-	1,410.00	1,878.00	1,371.00	3,215.00	376.00	176.00	-	138,887.00
State Unemployment Ins.	3,774.00	20.00	26.00	31.00	99.00	549.00	-	49.00	65.00	47.00	111.00	13.00	6.00	-	4,790.00
Workers Comp.	74,954.00	397.00	506.00	623.00	1,963.00	10,899.00	-	966.00	1,286.00	939.00	2,201.00	257.00	121.00	-	95,112.00
Supplies	205,965.00	-	23,700.00	159,500.00	27,750.00	11,500.00	348,852.00	5,024.00	4,997.00	821,973.00	500.00	-	498.00	506.00	1,610,765.00
Services	769,779.00	-	32,500.00	205,356.00	595,000.00	122,535.00	-	1,477,500.00	-	10,500.00	949.00	9,406.00	27,500.00	22,500.00	3,273,525.00
LCER Management Fee	2,136,050.00	-	-	-	-	-	-	-	-	-	-	-	-	-	2,136,050.00
Bond Rent	3,076,875.00	-	-	-	-	-	-	-	-	-	-	-	-	-	3,076,875.00
Capital Site Improvements	-	-	-	-	25,000.00	-	-	-	-	-	-	-	-	-	25,000.00
Total	16,636,511.00	48,637.00	124,935.00	458,121.00	944,850.00	1,648,485.00	348,852.00	1,618,542.00	189,349.00	960,815.00	310,234.00	40,899.00	43,595.00	23,006.00	23,396,831.00
Revenue-Expenditures						(863,579.00)	-	-	-	-	(21,863.00)	-	-	-	-

Appendix IV

Quarterly Report Certificates

EXHIBIT B

QUARTERLY REPORT CERTIFICATE

Name of Issuer:	California Enterprise Development Authority
Name of Issue:	Charter School Revenue Bonds (Norton Science and Language Academy Project) Tax-Exempt, Series 2020
Name of Borrower:	230 South Waterman Avenue LLC
Name of Lessee:	The High Desert "Partnership in Academic Excellence" Foundation, Incorporated
Date of Issuance:	June 16, 2020

Pursuant to the Continuing Disclosure Agreement, dated as of June 1, 2020, between the Lessee, the Borrower, and the Dissemination Agent, the undersigned representative of the Lessee and the Borrower does hereby certify that the enclosed unaudited financial statements of the Lessee and the Borrower for the quarter ended _June_, 2024, complies with the requirements of Section 3 of the Continuing Disclosure Agreement.

230 SOUTH WATERMAN AVENUE LLC, a California limited liability company

By: The High Desert "Partnership in Academic Excellence" Foundation, Incorporated, a California nonprofit public benefit corporation, its sole member

By: Lisa Lamb
Its: President/CEO

THE HIGH DESERT "PARTNERSHIP IN ACADEMIC EXCELLENCE" FOUNDATION, INCORPORATED, a California nonprofit public benefit corporation

By: Patricia Caldwell, Ph.D.
Its: Board Chair

EXHIBIT B

QUARTERLY REPORT CERTIFICATE

Name of Issuer:	California Enterprise Development Authority
Name of Issue:	Charter School Revenue Bonds (Norton Science and Language Academy Project) Tax-Exempt, Series 2021
Name of Borrower:	230 South Waterman Avenue LLC
Name of Lessee:	The High Desert "Partnership in Academic Excellence" Foundation, Incorporated
Date of Issuance:	December 21, 2021

Pursuant to the Continuing Disclosure Agreement, dated as of December 1, 2021, between the Lessee, the Borrower, and the Dissemination Agent, the undersigned representative of the Lessee and the Borrower does hereby certify that the enclosed unaudited financial statements of the Lessee and the Borrower for the quarter ended June, 2024, complies with the requirements of Section 3 of the Continuing Disclosure Agreement.

230 SOUTH WATERMAN AVENUE LLC, a California limited liability company

By: The High Desert "Partnership in Academic Excellence" Foundation, Incorporated, a California nonprofit public benefit corporation, its sole member

By: Lisa Lamb
Its: President | CEO

THE HIGH DESERT "PARTNERSHIP IN ACADEMIC EXCELLENCE" FOUNDATION, INCORPORATED, a California nonprofit public benefit corporation

By: Patricia Caldwell, Ph.D.
Its: Board Chair

$8,345,000
California Enterprise Development Authority
Charter School Revenue Bonds
(Academy for Academic Excellence Project)
Tax-Exempt Series 2020A

CUSIP
7/1/2040: 13069AAA6
7/1/2050: 13069AAB4
7/1/2055: 13069AAC2

$1,020,000
California Enterprise Development Authority
Charter School Revenue Bonds
(Academy for Academic Excellence Project)
Taxable Series 2020B

CUSIP
7/1/2028: 13069AAD0

Quarterly Report – June 30, 2024

Campanile
Group, Inc.

This report has been prepared by Campanile Group, Inc., at the direction of the Borrower. The information set forth herein has been furnished by the Borrower, along with other sources believed to be reliable, but no representation as to the accuracy or completeness of any such information is made by the Campanile Group, Inc.

1. Unaudited Financial Statements and Other Financial Information

Unaudited financial statements and other financial information, including a statement of revenues and expenses and a statement of revenues and expenses and a balance sheet, each in comparative form, to the extent practicable, with the financial figures from the corresponding period in the preceding Fiscal Year.

The unaudited financial statements and other financial information are provided in Appendix I.

2. Student Enrollment

The student enrollment number for the most recently completed quarter.

The student enrollment number is provided in Appendix II.

3. Capital Improvements Report

For each Quarterly Report, commencing with the report for the quarter ending March 31, 2020, through and including the month in which the Capital Improvements (as defined in the Limited Offering Memorandum) are completed, the Borrower, or upon delivery to the Dissemination Agent, the Dissemination Agent, shall provide to EMMA a report indicating the percentage of the Capital Improvements completed as of the end of the previous month, the then-contemplated timeline for completion of the Capital Improvements, and a description of any changes in anticipated timing or cost from the construction report for the prior month.

The capital improvements were completed on May 27, 2021.

4. Charter School Contract Changes

A description of any Charter School Contract renewal application submitted and expected timeline for a decision on such application, if any, and a description of a decision on any Charter School Contract renewal application received, if any, during such quarter.

None.

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5. Budget (For quarter ending June 30)

The Quarterly Report for each quarter ending June 30 shall include a copy of the proposed annual operating budget for the School for the succeeding Fiscal Year as submitted to the California Department of Education.

The budget for Fiscal Year 2024-25 is provided in Appendix III.

6. Notice of Charter Non-Compliance

Unless previously disseminated, the next Quarterly Report to be disseminated shall contain a copy or complete description of any notice, report or communication with respect to charter non-compliance that would allow the Lessee's charter authorizer to begin any process or proceedings toward charter revocation or which indicate an intent not to renew any such charter.

Not applicable.

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Appendix I

Unaudited Financial Statements

Academy for Academic Excellence

Statement of Financial Position
As Of June 30, 2024

	July 1, 2023	June 30, 2024
ASSETS		
Current Assets		
Cash and Cash Equivalents	$ 10,534,493	$ 9,893,372
Cash held in Trust	$ -	-
Accounts Receivable	3,623,915	2,964,481
Intracompany Receivable	-	-
Laptop Lease Receivable	-	-
Laptop Inventory	-	-
Prepaid Expenses	70,817	180,508
Total Current Assets	14,229,226	13,038,361
Non-Current Asset		
Lease Payment Receivable - Long Term	-	-
Right of Use, Operating Lease	157,555	157,555
Right of Use, Finance Lease	8,461,552	8,461,552
Unamortized Debt Issuance Costs	-	-
Total Non-Current Assets	8,619,107	8,619,107
Capital Assets		
Non-depreciable Assets	271,800	271,800
Depriciable Assets	1,093,088	2,958,979
Accumulated Depreciation	(172,501)	(239,969)
Total Capital Assets	1,192,387	2,990,811
TOTAL ASSETS	24,040,720	24,648,279
LIABILITIES AND NET ASSETS		
LIABILITIES		
Current Liabilities		
Current Portion of Long Term Liabilities	-	-
Accrued Payroll and Payroll Expenses	41,917	34,886
Line of Credit	-	-
Accounts Payable	375,185	764,038
Deferred Revenue	178,586	-
Due to Government Grantor	183,149	241,224
Operating lease libility, current portion	34,100	34,100
Finance lease liability, current portion	125,000	125,000
Due to Student Groups	-	-
Total Current Liabilities	937,936	1,199,248
Non-Current Liabilities		
Operating Lease Liability, Net Current portion		
Finance lease liability, net of current portion		
Long Term Liabilities		
Interest Rate Swap Agreement	-	-
Voluntery Retirement & OPEB, Less Current Portion	-	-
Laptop Capital Lease Payments Less Current Portion	-	-
Copier lease liability, Less Current Portion	123,455	123,455
Finance lease liability, net of current portion	8,895,000	8,895,000
Total Long-Term Liabilities	9,018,455	9,018,455
TOTAL LIABILITIES	9,956,391	10,217,703
NET ASSETS		
Unrestricted	14,084,329	14,430,576
Temporarily Restricted	-	(0)
Permanently Restricted	-	-
TOTAL NET ASSETS	14,084,329	14,430,576
TOTAL LIABILITIES AND NET ASSETS	24,040,720	24,648,279

Academy for Academic Excellence

Statement of Activities
For the 4th Qtr June 30, 2024

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
REVENUES, GAINS, AND OTHER SUPPORT				
Federal Special Education		$ 208,271		$ 208,271
National School Lunch		$ 307,200		307,200
Other Federal Revenues	151,200	727,929		879,129
State General Purpose Apportionment	12,983,885			12,983,885
District In-Lieu Property Tax	1,557,336			1,557,336
Education Protection Account	2,288,085			2,288,085
Lottery	304,786	158,722		463,508
State Special Education		1,031,468		1,031,468
One Time Funding	41,389			41,389
Other State Revenues	(58,496)	514,890		456,394
Donations	1,444	-		1,444
Donations - In-Kind		-		-
Student Activities	-			-
Class Fees	-			-
Food Services	-	576,182		576,182
Other Local Revenues	135,002	-		135,002
Interest Earned	60,244	-	-	60,244
Transfers	(607,843)			(607,843)
Net Assets Released From Restrictions:				
	-	-		-
Other Federal Restricted Funds	727,929	(727,929)		-
Lottery	158,722	(158,722)		-
Other State Funds	514,890	(514,890)		-
Special Education	1,239,739	(1,239,739)		-
Food Services	883,381	(883,381)		-
Restricted Cash Donations	-	-		-
Restricted In-Kind Donations	-	-		-
REVENUES, GAINS, AND OTHER SUPPORT	20,381,693	(0)	-	20,381,693
EXPENSES				
Certificated Salaries	7,779,207			7,779,207
Classified Salaries	2,135,920			2,135,920
Benefits	3,791,654			3,791,654
Total Salaries and Benefits	13,706,781			13,706,781
Books and Supplies	1,822,570			1,822,570
Services, Other Operating Expenses	2,220,870			2,220,870
Management Fee	2,159,059			2,159,059
Free Use of Facilities - Apple Valley School District	-			-
Capital Outlay	58,698			58,698
Debt Service	-			-
Amortization of Bond Cost	-			-
Depreciation	67,468			67,468
Total Expenditures	20,035,445	-	-	20,035,445
Net Change in Assets from Operations	346,247	(0)	-	346,247
Net Assets Beginning of Year as originally stated	14,084,329	-	-	14,084,329
Unrealized gain/(loss) on Interest Rate Swap	-	-	-	-
Net Assets Beginning of Year, as restated	14,084,329	-	-	14,084,329
Net Assets End of Year	14,430,576	(0)	-	14,430,576

Academy for Academic Excellence

As of 4/1/2024 - 6/30/2024

		Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Revenue						
Revenue						
Revenue	4000	8,545,361.33	20,929,292.01	21,486,855.00	557,562.99	22,427,487.75
Revenue - Interest	4100	21,199.31	60,243.98	52,000.00	(8,243.98)	35,527.57
Transfers Received	4990	(607,843.13)	(607,843.13)	0.00	607,843.13	(345,441.53)
Total Revenue		7,958,717.51	20,381,692.86	21,538,855.00	1,157,162.14	22,117,573.79
Total Revenue		7,958,717.51	20,381,692.86	21,538,855.00	1,157,162.14	22,117,573.79
Expenditures						
Cert Salaries						
Foundation Bonus	5000	0.00	49,302.00	0.00	(49,302.00)	0.00
Certificated Salaries	5100	1,877,906.60	7,082,279.44	7,323,299.00	241,019.56	6,392,203.10
Cert - Hourly	5102	10,395.38	39,071.18	53,234.00	14,162.82	53,594.13
Cert - Subs	5103	100,908.80	325,372.84	292,500.00	(32,872.84)	312,684.15
Cert - Supplemental	5104	67,114.90	133,118.74	85,000.00	(48,118.74)	184,882.54
Cert - Stipend	5105	54,851.62	149,136.28	130,375.00	(18,761.28)	133,035.61
Cert - OT	5106	146.26	926.27	1,500.00	573.73	995.01
Total Cert Salaries		2,111,323.56	7,779,206.75	7,885,908.00	106,701.25	7,077,394.54
Class Salaries						
Classified Salaries	5110	158,979.58	691,101.83	614,119.00	(76,982.83)	666,749.23
Class - Hourly	5112	322,066.41	1,227,687.11	1,326,911.00	99,223.89	998,509.00
Class - Subs	5113	58,739.53	166,167.12	80,000.00	(86,167.12)	48,457.03
Class - Supplemental	5114	12,208.96	22,777.49	25,000.00	2,222.51	25,681.29
Class - Stipend	5115	2,725.82	15,184.10	65,750.00	50,565.90	41,569.67
Class - OT	5116	2,611.13	13,002.74	18,000.00	4,997.26	9,308.80
Total Class Salaries		557,331.43	2,135,920.39	2,129,780.00	(6,140.39)	1,790,275.02
Benefits						
Employee Benefits	5200	424,829.37	1,366,164.05	1,340,068.00	(26,096.05)	1,264,745.84
STRS	5201	372,758.88	1,368,349.62	1,415,076.00	46,726.38	1,214,682.81
PERS	5202	162,606.94	631,572.51	684,041.00	52,468.49	544,340.36
Apple Retirement	5203	3,158.82	10,269.48	7,500.00	(2,769.48)	9,569.23
SS Classified	5204	39,366.46	150,794.37	134,453.00	(16,341.37)	130,780.00
Medicare	5205	37,427.46	138,483.82	145,828.00	7,344.18	124,607.69
SUI Classified	5208	1,333.75	4,933.18	5,026.00	92.82	44,367.21
Workers Comp	5209	26,414.12	98,469.30	140,798.00	42,328.70	124,030.73
Total Benefits		1,067,895.80	3,769,036.33	3,872,790.00	103,753.67	3,457,123.87
Supplies						
Approved Text Books	5300	44.68	191,054.07	200,000.00	8,945.93	217,576.44
Classroom Books	5301	407.01	10,598.72	16,000.00	5,401.28	27,073.14
Class Supplies	5320	77,198.58	197,359.85	185,700.00	(11,659.85)	84,587.95
Other Supplies	5322	24,635.30	95,151.04	109,234.00	14,082.96	222,842.88
Equipment (under 5K)	5325	7,140.02	20,382.20	21,000.00	617.80	10,866.26
Reimbursables	5327	1,595.73	58,759.46	35,000.00	(23,759.46)	48,473.63
Food	5360	263,843.12	630,435.94	522,500.00	(107,935.94)	516,350.08
Office Supplies	5530	10,997.83	30,457.35	28,050.00	(2,407.35)	37,844.26
Postage	5540	58.35	122.23	500.00	377.77	189.81
Computers	6210	95,965.05	447,197.44	475,000.00	27,802.56	310,494.72
Software	6220	2,459.11	124,313.75	120,000.00	(4,313.75)	109,239.31
Furniture	6230	4,965.86	9,035.15	126,000.00	116,964.85	40,393.84
Books, Media, Library	6240	365.37	7,702.38	7,500.00	(202.38)	4,582.76
Total Supplies		489,676.01	1,822,569.58	1,846,484.00	23,914.42	1,630,515.08

Academy for Academic Excellence

As of 4/1/2024 - 6/30/2024

		Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Services						
Employee Admin	5220	706.26	3,165.29	3,000.00	(165.29)	3,005.42
Testing	5331	116.06	5,384.50	22,626.00	17,241.50	21,153.83
Fundraising	5335	0.00	931.61	0.00	(931.61)	0.00
Referees	5340	3,000.00	17,100.00	17,500.00	400.00	14,000.00
Field Trip	5350	13,601.00	72,939.31	30,000.00	(42,939.31)	32,171.55
Travel	5400	6,818.57	9,964.96	9,500.00	(464.96)	3,469.65
Training and Conferences	5410	11,377.32	45,154.42	89,448.00	44,293.58	77,891.63
Other Services	5412	2,968.61	15,347.83	9,000.00	(6,347.83)	3,694.19
Dues and Memberships	5420	925.00	29,640.74	24,825.00	(4,815.74)	25,814.53
AVUSD Fees	5421	0.00	0.00	19,359.00	19,359.00	17,004.22
S B Co Fees	5422	115,550.00	118,025.00	10,000.00	(108,025.00)	6,750.00
LCER Management Fee	5423	2,158,744.00	2,159,059.00	2,209,492.00	50,433.00	1,957,907.00
Banking fees	5425	(49.93)	(48.87)	0.00	48.87	0.00
Insurance	5430	0.00	145,489.40	300,000.00	154,510.60	118,477.14
Legal Fees	5440	5,457.50	77,589.96	29,500.00	(48,089.96)	3,177.04
Consulting	5441	23,260.10	46,604.60	387,000.00	340,395.40	36,755.24
Consulting/Sub Agreements	5442	57,233.00	110,858.00	0.00	(110,858.00)	0.00
Trash-Sewer	5460	16,226.07	66,624.24	65,000.00	(1,624.24)	29,556.62
Gardening	5470	2,420.66	14,550.86	15,000.00	449.14	5,560.56
Janitorial	5480	14,194.23	70,219.90	92,000.00	21,780.10	68,128.71
Pest Control	5490	1,440.00	1,982.20	2,000.00	17.80	0.00
Security	5500	1,219.66	(251,381.77)	17,500.00	268,881.77	8,337.16
Telephone	5510	(34,474.28)	24,429.75	59,880.00	35,450.25	85,929.12
Utilities	5520	115,429.80	332,107.71	275,000.00	(57,107.71)	356,734.23
Copier	5531	17,112.21	69,312.72	48,256.00	(21,056.72)	23,882.50
Emergency-First Aid	5532	2,323.58	2,560.14	25,000.00	22,439.86	12,355.83
Bank Fees	5533	0.00	1,500.00	0.00	(1,500.00)	1,500.00
Rental - Leases	5550	149,329.17	797,584.57	583,000.00	(214,584.57)	5,977.73
Advertising - Marketing	5561	2,105.05	3,305.05	10,000.00	6,694.95	0.00
Public Relations	5562	809.30	1,525.00	15,000.00	13,475.00	2,688.93
Special Events	5563	13,360.45	22,731.45	20,000.00	(2,731.45)	50,540.36
Facilities - Maintenance	6010	39,555.61	182,049.47	175,000.00	(7,049.47)	112,787.71
Auto	6110	54.00	54.00	0.00	(54.00)	0.00
Bus	6115	44,183.24	140,582.24	95,078.00	(45,504.24)	113,730.98
Equipment Repairs	6205	825.00	42,985.76	98,486.00	55,500.24	21,710.21
Total Services		2,785,821.24	4,379,929.04	4,757,450.00	377,520.96	3,220,692.09
Capital Exp						
Construction	5600	48,898.00	58,698.00	0.00	(58,698.00)	(10,780.50)
Sites - Improvements of Site	6000	(807,511.10)	0.00	75,000.00	75,000.00	10,531.95
Building -Improvements of Bldg	6100	(197,968.02)	0.00	290,000.00	290,000.00	0.00
Capital Equipment (over 5 K)	6200	(30,832.60)	0.00	75,000.00	75,000.00	0.00
Total Capital Exp		(987,413.72)	58,698.00	440,000.00	381,302.00	(248.55)
Debt Service						
Interest Expense	5571	0.00	0.00	0.00	0.00	461,200.00
Depreciation	6900	16,867.02	67,468.08	0.00	(67,468.08)	63,276.63
Amortization	6910	0.00	0.00	0.00	0.00	264,424.00
Total Debt Service		16,867.02	67,468.08	0.00	(67,468.08)	788,900.63
Total Expenditures		6,041,501.34	20,012,828.17	20,932,412.00	919,583.83	17,964,652.68

Academy for Academic Excellence

As of 4/1/2024 - 6/30/2024

	Current Period	YTD Actual	Total Budget	Remaining Budget	PY Actual
Revenue and Expense	1,917,216.17	368,864.69	606,443.00	237,578.31	4,152,921.11

Academy for Academic Excellence

Statement of Cash Flows
For the 4th Qtr June 30, 2024

CASH FLOWS FROM OPERATING ACTIVITIES	
Change in Net Assets	$ 346,247
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities	
Depreciation and Amortization	67,468
Unrealized loss/(gain) on interest rate swap	-
(Increase) Decrease in operating assets:	
Accounts Receivable	659,435
Stores Inventory	-
Prepaid Expense	(109,691)
Intercompany receivables	
Increase (Decrease) in operating lisbilities:	
Current portion of loans payable	
Accrued Payroll and Payroll Expenses	(7,030)
Accounts Payable	388,853
Deferred Revenue	(178,586)
Due to Government Grantor	58,075
Due to Student Groups	-
Net Cash Provided by Operating Activities	1,224,771
CASH FLOWS FROM INVESTING ACTIVITIES	
Purchase of Equipment, Furniture and Building Improvements	(1,865,892)
Net Cash Used by Investing Activities	(1,865,892)
CASH FLOWS FROM FINANCING ACTIVITIES	
Proceeds from Line of Credit	-
Additional Bond Issuance Cost	-
Additional Apple Lease	-
Payments on Outstanding Loans	-
Net Cash Used by Financing Activities	-
Net Increase in Cash	(641,121)
BEGINNING CASH	10,534,493
ENDING CASH	9,893,372
Days Cash on Hand	**202.00**

Appendix II

Student Enrollment

Academy for Academic Excellence

Enrollment

As of 6/30/2024

Grade Level	As of 9/30/2021	As of 12/31/2021	As of 3/31/2022	As of 6/30/2022	As of 9/30/2022	As of 12/31/2022	As of 3/31/2023	As of 6/30/2023	As of 9/30/2023	As of 12/31/2023	As of 3/31/2024	As of 6/30/2024
TK	25	25	25	25	44	43	43	43	48	47	47	47
K	99	98	97	95	100	99	99	99	100	99	99	98
1	100	100	98	98	98	100	99	98	100	100	99	99
2	100	100	98	97	100	99	99	99	98	97	98	98
3	112	111	106	105	112	112	112	112	112	111	110	109
4	112	111	109	109	112	111	111	111	112	112	110	110
5	112	111	111	110	112	112	111	111	112	111	112	112
6	124	122	124	124	124	124	122	122	122	120	121	119
7	124	123	116	116	124	122	121	121	125	124	123	123
8	123	118	118	118	123	124	123	122	123	121	122	122
9	114	112	109	109	114	114	113	111	112	108	110	110
10	115	112	109	109	109	107	104	104	105	103	104	104
11	103	102	98	97	116	114	112	112	104	104	104	103
12	99	94	97	95	96	94	94	94	119	118	115	116
Total	1462	1439	1415	1407	1484	1475	1463	1459	1492	1475	1474	1470

Appendix III

FY 2024-25 Budget

AAE 2024-2025 Annual Budget

Revenue

	Title	Unrestricted	Restricted	Total
Source	ADA/LCFF	9,363,860.00	-	9,363,860.00
	Property Tax	1,935,880.00	-	1,935,880.00
	LCFF Supplemental	1,401,271.00	-	1,401,271.00
	LCFF Concentration	-	-	-
	Education Protection Act	4,711,798.00	-	4,711,798.00
	Lottery	263,130.00	-	263,130.00
	Lottery - Res. 6300	-	107,036.00	107,036.00
	Special Needs (AB602)	-	1,057,050.00	1,057,050.00
	Special Needs (Federal)	-	208,271.00	208,271.00
	Mandate Block Grant	43,191.00	-	43,191.00
	MAA	22,000.00	-	22,000.00
	Cafeteria - Local	-	-	-
	Cafeteria - Federal	-	335,000.00	335,000.00
	Cafeteria - State	-	625,000.00	625,000.00
2600	ELO - ASP/Summer Academy	-	583,392.00	583,392.00
7435	Learning Recovery Emergency	-	280,651.00	280,651.00
2505	Title I	-	187,736.00	187,736.00
2515	Title II	-	34,991.00	34,991.00
2530	Title IV	-	14,578.00	14,578.00
	Prop 28		214,172.00	214,172.00
	Interest	52,000.00	-	52,000.00
	ROTC	97,848.00	-	97,848.00
	Total Revenue	**17,890,978.00**	**3,647,877.00**	**21,538,855.00**

	Unrestricted	Restricted	Total
Reserves - 1.5%	271,192.00	-	271,192.00
Contributing Support Services	193,178.00	-	193,178.00
Direct Service Contribution to LCER - Nurse	87,523.00	-	87,523.00
STEM ELOP Programing	-	2,350.00	2,350.00
Direct Service Contribution to LCER - Food Services Admin	-	61,640.00	61,640.00
Direct Service Contribution to LCER - SPED Admin	-	225,373.00	225,373.00
Grand Total Revenue	**17,339,085.00**	**3,358,514.00**	**20,697,599.00**
			18,488,107.00

		Unrestricted Programs							Restricted Programs									
		AAE General	Stipends	Athletics	ROTC	Library	Facilities	IT	LREBG	SPED	VAPA	Food Services	ELOP	Title I	Title II/CL PD	Title IV	Total	
AAE Salaries	Certificated	5,920,509.00	-	-	224,590.00	-	-	-	206,077.00	802,172.00	99,847.00	-	-	79,478.00	-	-	7,332,674.00	
	Certificated Hourly	55,728.00	-	-	-	-	-	-	-	-	-	-	31,580.00	-	-	-	87,308.00	
	Certificated Substitute	330,750.00	-	-	-	-	-	-	-	12,500.00	-	-	-	-	-	-	343,250.00	
	Certificated Supplemental	45,000.00	-	-	-	-	-	-	-	15,409.00	-	-	-	-	-	-	60,409.00	
	Certificated Stipends	36,399.00	$44,000.00	10,000.00	12,000.00	-	-	-	-	-	11,922.00	-	-	4,000.00	40,700.00	-	159,021.00	7,982,662.00
	Classified	392,986.00	-	103,147.00	-	-	101,195.00	56,095.00	-	40,066.00	-	-	-	-	-	-	693,490.00	
	Classified Hourly	682,154.00	-	-	-	28,810.00	89,885.00	-	-	227,796.00	35,934.00	98,521.00	26,978.00	63,667.00	-	-	1,253,745.00	
	Classified Substitute	100,000.00	-	-	-	-	-	-	-	6,002.00	-	-	-	-	-	-	106,002.00	
	Classified Supplemental	30,000.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	30,000.00	
	Classified Stipends	-	-	65,750.00	-	-	-	-	-	-	-	-	-	-	-	-	65,750.00	
	Classified OT	5,500.00	-	-	-	-	3,500.00	-	-	-	-	-	-	-	-	-	9,000.00	2,157,987.00
	Employee Benefits	1,182,302.00	-	21,847.00	37,285.00	-	23,725.00	21,847.00	30,076.00	128,474.00	15,496.00	-	-	7,029.00	-	-	1,468,081.00	
	STRS	1,154,465.00	8,404.00	1,692.00	45,189.00	-	-	-	39,361.00	158,546.00	21,348.00	-	6,032.00	15,944.00	7,774.00	-	1,458,755.00	
	PERS	419,060.00	-	45,687.00	-	7,793.00	51,687.00	15,174.00	-	74,080.00	9,720.00	26,650.00	1,688.00	17,222.00		-	668,761.00	
	Apple	-	-	-	-	-	-	-	-	-	-	-	778.00	-	-	-	778.00	
	Social Security	75,060.00	-	10,472.00	-	1,786.00	12,064.00	3,478.00	-	16,980.00	2,228.00	6,108.00	387.00	3,947.00	-	-	132,510.00	
	Medicare	110,186.00	638.00	2,594.00	3,431.00	418.00	2,821.00	813.00	2,988.00	16,007.00	2,142.00	1,429.00	849.00	2,134.00	590.00	-	147,040.00	
	State Unemployment Ins.	3,800.00	22.00	89.00	118.00	14.00	97.00	28.00	103.00	552.00	74.00	49.00	29.00	74.00	20.00	-	5,069.00	
	Workers Comp.	75,458.00	437.00	1,776.00	2,349.00	286.00	1,932.00	557.00	2,046.00	10,962.00	1,467.00	978.00	582.00	1,461.00	404.00	-	100,695.00	3,981,689.00
	Supplies	294,343.00	-	37,300.00	-	7,600.00	42,500.00	180,358.00	-	16,500.00	24,666.00	759,625.00	9,639.00	4,780.00	-	500.00	1,377,811.00	
	Services	539,574.00	-	122,000.00	-	-	671,500.00	217,622.00	-	34,500.00	3,825.00	5,000.00	337,500.00	3,000.00	-	14,078.00	1,948,599.00	
	AVUSD Fees	19,359.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	19,359.00	
	LCER Management Fee	2,209,492.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2,209,492.00	
	Bond Rent Payments	580,000.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	580,000.00	
	Capital Site Improvements	-	-	-	-	-	275,000.00	-	-	-	-	-	165,000.00	-	-	-	440,000.00	
	Total	14,262,125.00	53,501.00	422,354.00	324,962.00	46,707.00	1,275,906.00	495,972.00	280,651.00	1,560,546.00	228,669.00	898,360.00	581,042.00	202,736.00	49,488.00	14,578.00	20,697,599.00	
	Revenue-Expenditures								-	(520,598.00)	(14,497.00)	-	-	(15,000.00)	(14,497.00)	-	-	

LCER Board Meetings
Attendance Log 2024

	January Regular	February Regular	March Regular	April Regular	May Regular	June Regular	August Regular	Sept. Regular	Oct Regular	Dec Regular	TOTAL REGULAR
Sharon Page	Present	Present	Present	Present	Present	Present	Present				100%
David Rib	Present	Present	Present	Present	Present	Present	Present				100%
Pat Caldwell	Present	Absent	Present	Present	Present	Present	Present				86%
Steve Levin	Present	Present	Present	Present	Present	Present	Absent				86%
Marisol Sanchez	Present	Present	Present	Absent	Present	Absent	Present				71%
Yolanda Carlos	Present	Present	Absent	Present	Present	Absent	Present				71%
Pat Schlosser	Present	Present	Absent	Present	Absent	Present	Present				71%
Jessica Rodriguez	Present	Absent	Present	Absent	Present	Present	Present				71%
Omari Onyango	Present	Present	Absent	Absent	Absent	Absent	Absent				29%

	Special Meetings		
	April 5	**May 28**	
Pat Caldwell	Absent	Present	
Yolanda Carlos	Present	Present	
Steve Levin	Present	Absent	
Omari Onyango	Present	Absent	
Sharon Page	Present	Present	
David Rib	Present	Present	
Jessica Rodriguez	Present	Present	
Marisol Sanchez	Present	Present	
Pat Schlosser	Present	Absent	

LCER Board Give and Get
Fiscal Year 2024/2025 - As of 7/31/24

Member	Give	Get	In-kind	Total
Pat Caldwell				$ -
Yolanda Carlos				$ -
Omari Onyango				$ -
Sharon Page				$ -
Jessica Rodriguez	$ 155			**$ 155**
Marisol Sanchez	$ 2,500			**$ 2,500**
David Rib				$ -
Pat Schlosser				$ -
Total	**$ 2,655**	**$ -**	**$ -**	**$ 2,655**

Lewis Center Foundation Board Give and Get
Fiscal Year 2020/2021

Member	Give	Get	In-kind	Total
				$ -
Buck Goodspeed				$ -
Vianey Gonzalez				$ -
Ambar Martinez		$ 500		**$ 500**
Jessica Rodriguez	$ 155			**$ 155**
Marisol Sanchez	$ 2,500			**$ 2,500**
Total	**$ 2,655**	**$ 500**	**$ -**	**$ 3,155**

Total Combined Boards	**$ 2,811**	**$ 500**	**$ -**	**$ 3,155**