

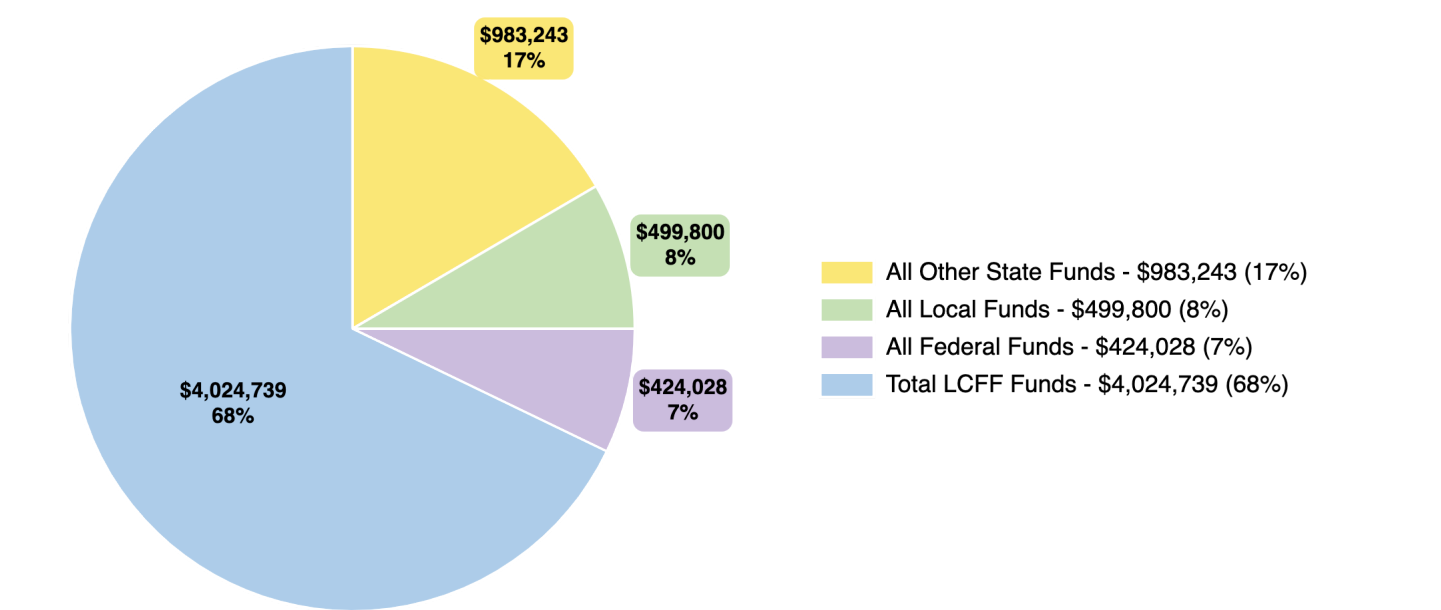
# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: International School of Monterey  
CDS Code: 27660926118962  
School Year: 2022-23  
LEA Contact Information: Sean Madden | [director@ismonterey.org](mailto:director@ismonterey.org) | 831-241-2193

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

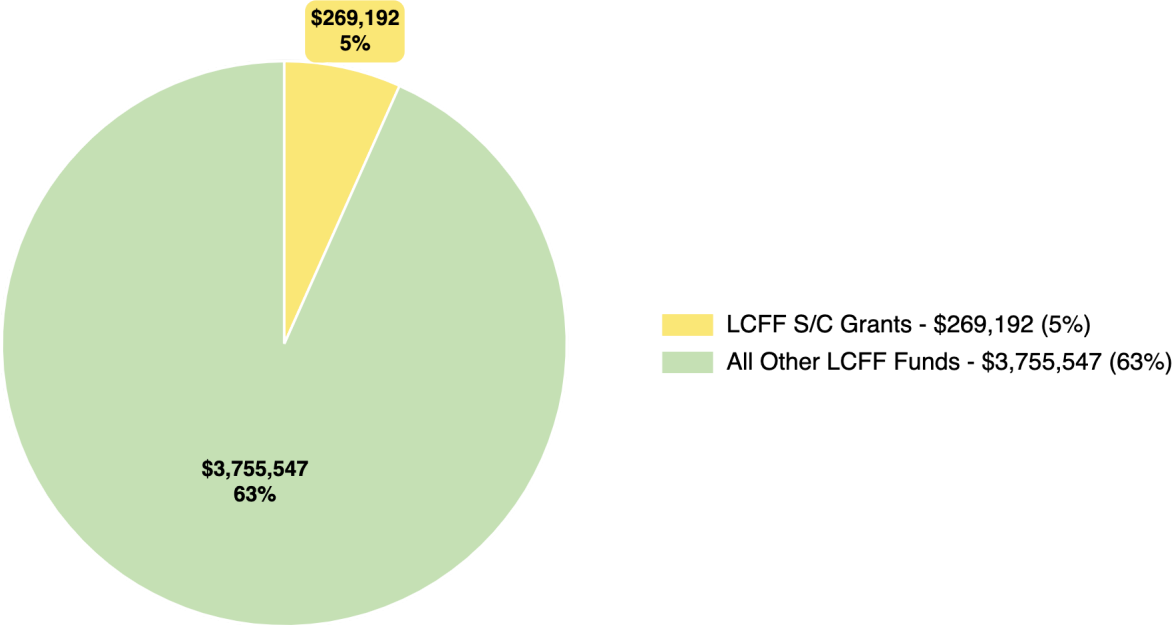
## Budget Overview for the 2022-23 LCAP Year

### Projected Revenue by Fund Source



Source	Funds	Percentage
All Other State Funds	\$983,243	17%
All Local Funds	\$499,800	8%
All Federal Funds	\$424,028	7%
Total LCFF Funds	\$4,024,739	68%

Breakdown of Total LCFF Funds



Source	Funds	Percentage
LCFF S/C Grants	\$269,192	5%
All Other LCFF Funds	\$3,755,547	63%

These charts show the total general purpose revenue International School of Monterey expects to receive in the coming year from all sources.

The total revenue projected for International School of Monterey is \$5,931,810, of which \$4,024,739 is Local Control Funding Formula (LCFF), \$983,243 is other state funds, \$499,800 is local funds, and \$424,028 is federal funds. Of the \$4,024,739 in LCFF Funds, \$269,192 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

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

## Budgeted Expenditures in the LCAP



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

International School of Monterey plans to spend \$6,087,959 for the 2022-23 school year. Of that amount, \$1,214,823 is tied to actions/services in the LCAP and \$4,873,136 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

International School of Monterey plans to spend \$6,087,959 for the 2022-2023 school year. Of that amount, \$1,214,823 is tied to actions/services in the LCAP and \$4,873,136 is not included in the LCAP.

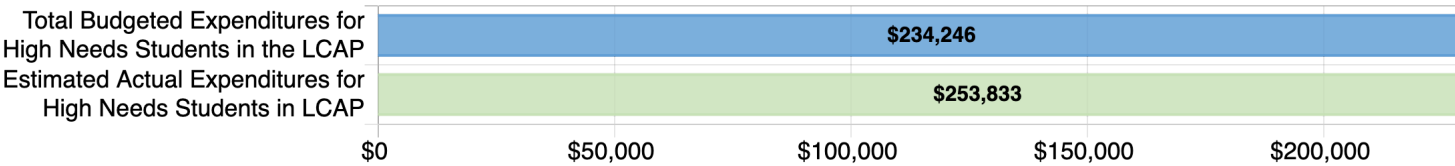
The budgeted expenditures that are not included in the LCAP will be used for the following:  
funding of ongoing operations and services not tied directly to the eight ISM Actions in the LCAP.

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

In 2022-23, International School of Monterey is projecting it will receive \$269,192 based on the enrollment of foster youth, English learner, and low-income students. International School of Monterey must describe how it intends to increase or improve services for high needs students in the LCAP. International School of Monterey plans to spend \$297,369 towards meeting this requirement, as described in the LCAP.

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

# Prior Year Expenditures: Increased or Improved Services for High Needs Students



*This chart compares what International School of Monterey budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what International School of Monterey estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.*

In 2021-22, International School of Monterey's LCAP budgeted \$234,246 for planned actions to increase or improve services for high needs students. International School of Monterey actually spent \$253,833 for actions to increase or improve services for high needs students in 2021-22.

## Instructions

### LCFF Budget Overview for Parents Data Entry Instructions

These instructions are for the completion of the Local Control Funding Formula (LCFF) Budget Overview for Parents.

**\*NOTE:** The "High Needs Students" referred to below are Unduplicated Students for LCFF funding purposes.

#### LEA Information

The LEA must enter the LEA name, county district school (CDS) code (14 digits), and LEA contact information (name, phone number and email address) in the corresponding blue boxes.

*Coming School Year:* This information is automatically generated.

*Current School Year:* This information is automatically generated.

#### Projected General Fund Revenue for the 2022–23 School Year

All amounts should be entered in the boxes below the corresponding amount title. The coming school year (as indicated above) means the fiscal year for which an LCAP is adopted or updated by July 1.

- **Total LCFF Funds:** This amount is the total amount of LCFF funding (including supplemental & concentration grants) the LEA estimates it will receive pursuant to California Education Code (EC) sections 2574 (for county offices of education) and 42238.02 (for school districts and charter schools), as applicable for the coming school year. This amount is the amount indicated in the Standardized Account Code Structure (SACS) Budget Fund Form 01, Column F, row A.1 (LCFF Sources).
- **LCFF Supplemental & Concentration Grants:** This amount is the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of low income, foster youth, and English learner students as determined pursuant to California Code of Regulations, Title 5 (5 CCR) Section 15496(a)(5), pursuant to EC sections 2574 and 42238.02, as applicable for the coming school year.
- **All Other State Funds:** This amount is the total amount of other state funds (do not include LCFF funds) the LEA estimates it will receive.
- **All Local Funds:** This amount is the total amount of local funds and entitlements the LEA estimates it will receive.
- **All Federal Funds:** This amount is the total amount of federal funds (including all Every Student Succeeds Act Title funds) the LEA estimates it will receive.

The total of the Projected General Fund Revenue should equal the amount indicated in the SACS Budget Fund Form 01, Column F, row A.5 (Total Revenues).

- **Brief description for General Fund Expenditures:** Briefly describe any of the General Fund Budget Expenditures for the current school year that are not included in the Local Control and Accountability Plan. The LEA's response for this prompt is limited to 450 characters.

#### Total Budgeted Expenditures for the 2022–23 School Year

- **Total Budgeted General Fund Expenditures:** This amount is the LEA's total budgeted General Fund expenditures for the coming school year as indicated on SACS Budget Fund Form 01, column F, Row B.9 (Total Expenditures). The General Fund is the main operating fund of the LEA and accounts for all activities not accounted for in another fund. All activities are reported in the General Fund unless there is a compelling reason to account for an activity in another fund. For further information please refer to the California School Accounting Manual (<http://www.cde.ca.gov/fg/ac/sa/>). (Note: For some charter schools that follow governmental fund accounting, this amount is the total budgeted expenditures in the Charter Schools Special Revenue Fund. For charter schools that follow the not-for-profit accounting model, this amount is total budgeted expenses, such as those budgeted in the Charter Schools Enterprise Fund.)
- **Total Budgeted Expenditures in the LCAP:** This is the total amount of budgeted expenditures for the planned actions to meet the goals included in the LCAP for the coming school year.
- **Total Budgeted Expenditures for High Needs Students in the LCAP:** This is the total amount of the LCFF funds budgeted to implement the planned actions and services included in the LCAP that are identified as contributing to the increased or improved services for high needs students pursuant to EC Section 42238.07.
- **Expenditures Not in the LCAP:** This amount is automatically calculated.
- **Brief description for High Needs Students:** If the amount in "Total Budgeted Expenditures for High Needs Students in the LCAP" is less than the amount in "LCFF Supplemental & Concentration Grants", a prompt will appear and the LEA must provide a brief description of the additional

actions it is taking to meet its requirement to increase or improve services for high needs students.

*Note:* If no prompt appears, the LEA is not required to supply a description.

## Expenditures for High Needs Students in the 2021–22 School Year

- *Total Budgeted Expenditures for High Needs Students in the LCAP:* This is the total amount of the LCFF funds budgeted to implement the planned actions and services included in the LCAP that are identified as contributing to the increased or improved services for high needs students pursuant to EC Section 42238.07 for the current school year.
- *Actual Expenditures for High Needs Students in the LCAP:* This is the total of the estimated actual expenditures of LCFF funds to implement the actions and services included in the LCAP that are identified as contributing to the increased or improved services for high needs students pursuant to EC Section 42238.07, as reflected in the Annual Update for the current LCAP year.
- *Brief description for actual expenditures for high needs students:* If the amount in “Total Budgeted Expenditures for High Needs Students in the LCAP” for the 2021–22 school year is greater than the amount in “Actual Expenditures for High Needs Students in LCAP”, a prompt will appear and the LEA must provide a brief description of how the difference impacted the actions and services and overall increased or improved services for high needs students in the current fiscal year pursuant to EC Section 42238.07.

*Note:* If no prompt appears, the LEA is not required to supply a description.

California Department of Education December 2021

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

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
International School of Monterey	Sean Madden Director	director@ismonterey.org 831-241-2193

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

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP)

The International School of Monterey (ISM) provided multiple opportunities during the year for our educational partners to provide feedback on the use of funds not included in the 2021-2022 Local Control and Accountability Plan (LCAP). This approach is consistent with and extends our ongoing constituency input processes as described in our Local Control and Accountability Plan. These opportunities were:

**Board of Trustees:** Per our charter, at least half of the members of our board must be parents. As such, the trustees represent our most important educational partners—our families—essentially filling the function of a parent advisory group.

**Board of Trustees meetings:** Every one of the eight board meetings scheduled each year serves as an opportunity for the general public to provide input to the board during designated public comment times as well as direct participation in the action item discussions.

**Coffee with the Admin:** Weekly coffee events provide an opportunity for parents/guardians to meet with the ISM director and other administrators for updates, questions, and answers. Specific topics change each month; however, the overall focus always remains on providing each and every one of ISM's students with a great school experience. Periodically, the director and administration team specifically ask participants about important topics, such as feedback on spending and funding. ISM invites parents/guardians to attend for the whole 45 minutes or to drop in for any part. The discussion is conducted in English with concurrent interpretation provided in Spanish upon request.

**Staff meetings:** ISM releases students at 12:55 every Wednesday. The ISM staff then engages in a variety of meetings and professional development and planning activities until 5:00 pm. The meetings and activities provide extensive opportunity for staff input into all aspects of the school's programs and operations, including plans and suggestions for funding. ISM also has a team-leader structure that provides for representative input from K-2, 3-5, and 6-8 teaching teams via bi-weekly teacher-leader meetings.

**Informal interaction:** Because ISM, as articulated in the charter, recognizes the importance of educational partner involvement and welcomes family presence in classrooms and on campus (during non-pandemic times), extensive opportunity exists for informal discussion among ISM trustees, administrators, staff, students, and parents/guardians. Within an atmosphere of continuous improvement, this results in extensive input regarding what is working and what might make ISM better.

This variety of input processes provided a wealth of information from multiple perspectives regarding ways ISM could and should spend additional monies to support the students, mission, and vision of the school. ISM administration took into consideration these suggestions throughout the planning and use of grant funding.

As part of ISM's ongoing commitment to reflective action, the school plans to gather additional feedback from our educational partners in the following ways:

**Strategic planning:** As a standing advisory committee of the board, the Strategic Planning Committee oversees an annual strategic planning process that leads to an update of the ISM Strategic Plan and the Local Control and Accountability Plan. A separate Strategic Advisory Team comprises representatives of the following major educational partners: families, teaching staff, non-teaching staff, administration, board, ISM Community Connection (PTA and Foundation equivalent), and community partners. These representatives consider multiple data sources in proposing the annual strategic plan and LCAP updates for board approval. This includes an annual assessment of progress toward target outcomes based on the metrics and targets built into the LCAP. The metrics address all state and local priorities. This year, discussions will also address funding from sources not specifically mentioned in the LCAP.

**Annual end-of-year surveys:** For the past 15 years, ISM has administered surveys for students, parents/guardians, and staff near the end of each school year. These surveys target feedback regarding specific areas of the academic program and overall operations through both Likert-scale items and open-ended questions about what stands out and what needs improvement.

Excerpts taken from the ISM 2021-2022 LCAP. See full community engagement details in the 2021-2022 LCAP on our ISMonterey.org website.

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



For ISM, the enrollment of students who are low-income, English learners, and/or foster youth is less than 55 percent. Therefore, the International School of Monterey does not receive this concentration grant add-on funding.

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

Because the use of ESSER III and ELOG funds will impact students, families, staff, and the local community, ISM engaged educational partners on the use of one-time federal funds to gain insight into what prevention and mitigation strategies will be best to keep students and staff safe and be most positively impactful on teaching, learning, and day-to-day school experiences.

Overall, we have engaged in meaningful consultation with students, families (including those who speak languages other than English), school leaders and administrators (including special education leadership), teachers, and non-teaching staff. We have reached out to tribes and civil rights and disability rights organizations, and we have received input from representatives of the American Civil Liberties Union (ACLU), the League of United Latin American Citizens (LULAC), and the National Association for the Advancement of Colored People (NAACP) as a result. Most importantly, we have received input from individuals representing the varied interests of our 426 K-8 students, including English learners, foster youth, homeless students, low-income students, migratory students, students of color, and students with disabilities. In subsequently creating our expenditure plan, we have considered the perspectives and insights of all individuals within these constituencies who have offered their input.

This approach is consistent with and extends our ongoing educational partner input processes as described in our Local Control and Accountability Plan:

“We have built ISM on a foundation of open exchange within a culture of family involvement. All members of our ISM family have engaged in notable educational innovation. There is a pervasive sense throughout our community that the success of this endeavor stems from working toward common goals including funding and continuous school improvement. Toward this end, we encourage communication and exchange of ideas among students, parents, faculty, staff, and trustees. As an IB World School, we remain open to fresh concepts and methodologies, and we nurture a culture that invites such input. During meetings held at least eight times per year during non-school hours, our Board of Trustees welcomes comments and input from all interested parties. Meanwhile, our administration hosts 45-minute weekly coffees where parents can ask questions and get answers regarding any current activity or concern.”

Given the ongoing direct involvement of various constituencies in all aspects of our school, to develop input for our LCAP, we turned to multiple enduring input mechanisms. In turn, we have looked at the LCAP learnings to help guide our ESSER III and ELOG planning, while also further utilizing these same

inputs as described in the LCAP and updated above in question 1.

These ongoing input mechanisms had already generated ample guidance on how we could spend ESSER III and ELOG monies for maximum positive impact on continuous and safe in-person learning as well as recovering from lost instructional time. Nonetheless, to directly inform our ESSER III and ELOG planning, we twice made this a Coffee with the Admin topic and again surveyed all of the prioritized educational partners in October 2021 to get up-to-the-minute insights based on current needs.

Excerpts taken from the ISM 2021-2022 ESSER III expenditure plan. See full community engagement details in the 2021-2022 ESSER III expenditure plan on our ISMonterey.org website.

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

ISM continues to maintain the health and safety of the educational community to ensure continuity of services through the implementation of the ESSER III Expenditure Plan. With community feedback, ISM identified two actions to be funded by ESSER III revenues: employ another custodian; and employ additional instructional aides.

The challenges we have experienced in implementation are:

One of the biggest challenges for the school was gathering a wide variety of educational partner feedback. As mentioned previously, we contacted many diverse stakeholders to gather a 360° view of our community's needs and priorities. While staff input was readily available, we needed to pursue parent input more widely and utilized survey data to get a better understanding of their collective needs. Our biggest obstacle was reaching our local community partners and garnering feedback from historically underrepresented partners. While we did receive some feedback, we continue to reflect on how we can improve the feedback process.

A second challenge that we continue to face is finding interested people to employ as instructional aides to offset learning loss from school closures last year. Initially, we approached our teaching staff to provide after-school tutorial support but quickly recognized that supporting teacher mental health was not in alignment with that offer. Our second, and more pedagogically sound approach, was to hire outside tutors to support student learning during the school day. Unfortunately, the size of our school made working with established tutoring companies challenging from a cost/ benefit perspective. Currently, we are searching for people who want to work as ISM employees to provide instructional aide/ tutorial support during the day. Our challenge remains in finding a pool of interested applicants at this time.

The successes we have experienced during implementation are:

Based on the feedback we received, we quickly reached out to our educational partners to find additional custodial support. One success was that we were able to hire a parent from our community

so that both our school and a community member benefited. Since hiring an additional custodian, ISM has been able to double the number of areas cleaned and sanitized daily. This has directly impacted the safety and security that our parents feel regarding sending their children to the campus each day. Further, it has aided the school in maintaining low numbers of infections rates during our initial reopening in the fall. The second custodian has allowed us to maintain fully stocked sanitizer stations, set up tables for outdoor activities more frequently, and provide daily sanitization of high traffic areas following the most recent Centers for Disease Control and California Department of Public Health guidelines for sanitation to continuously and safely operate our school for in-person learning.

Excerpts taken from the ISM 2021-2022 ESSER III expenditure plan. See full implementation details in the 2021-2022 ESSER III expenditure plan on our ISMonterey.org website.

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

The International School of Monterey will continue to ensure continuity of services, ensure safety of in-person instruction, address loss of instructional time (ESSER III Expenditure Plan), align with the 2021-2022 LCAP and Annual Update in the following ways:

LCAP Goal 1, Action #1.1 Special Education—continuity of instruction for students with supports

LCAP Goal 1, Action #1.2 Extended Learning Opportunities—instructional aides for continuity of instruction for all students

LCAP Goal 1, Action #1.3 Enhanced Math—instructional aide for continuity of instruction for all students

LCAP Goal 1, Action #1.5 Literacy Support—instructional aides for continuity of instruction for all students, including ELL

LCAP Goal 2, Action #2.1 Safe reopening of school facilities—safety of in-person instruction

These actions will supplement the work included in the 2021-2022 LCAP.

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

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

### Introduction

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

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

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

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

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

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

## Instructions

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

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

*Prompt 1:* "A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP)."

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the

Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

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

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

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

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

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

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

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

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

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

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

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

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans

in a manner that is aligned with the LEA's 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education November 2021



# Local Control and Accountability Plan

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

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
International School of Monterey	Sean Madden Director	director@ismonterey.org 831-241-2193

## Plan Summary 2022-23

### General Information

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

As an IB World School, the International School of Monterey (ISM) provides an exceptional international academic and extracurricular program for children in grades K-8. The ISM mission, philosophy, and International Baccalaureate (IB) curriculum provides for school-age children what Monterey's unique higher education institutions and international and multicultural businesses provide for adults. ISM offers a unique educational option for families that recognize the need for global awareness and skills that will allow students to succeed in a world that steadily continues to become more interconnected. As such, ISM naturally draws applicants from the large number of families in the Monterey area where parents/guardians, and often the children, have international travel and living experience. The school particularly connects with parents/guardians employed by institutions engaged in international business, language training, and international education.

As a charter school, ISM addresses the eight State Priorities applicable to every other public school in California as the school serves its 426 students through inquiry-based teaching and learning following the IB Primary Years Programme framework for grades K-5 and the IB Middle Years Programme framework for grades 6-8.

Reflecting its uniqueness ISM further serves its students by addressing three additional priorities established in the ISM Charter:

**MISSION:** Educate all children toward becoming conscientious, compassionate, and responsible citizens of the world (bring world-class international education to a public school setting; integrate best practices, established standards, and an international curriculum; maintain a multicultural environment

that advances understanding of and respect for all; promote strong partnerships among school, home, and community.)

(Priority M)

INTERNATIONAL PROGRAM: Provide an exceptional international academic and extracurricular program for children in grades K-8 that instills international-mindedness and works to inspire all children and the broader community by promoting awareness of other countries, languages, and cultures in active and visible ways. (Priority P)

SCHOOL WIDE LEARNER OUTCOMES: We will prepare all students and graduates to be:

- 1) Thoughtful lifelong learners who... a) are INQUIRERS; b) are OPEN-MINDED; c) are creative; d) are passionate about their own intellectual and artistic interests [BALANCED]; e) are metacognitively self-motivated, self regulating, and self-REFLECTIVE [RISK-TAKERS].
- 2) Good-hearted individuals who... a) are conscientious; b) are CARING; c) are compassionate; d) are managers of positive relationships; e) are respectful and understanding of diversity [PRINCIPLED].
- 3) Academically-excellent [KNOWLEDGEABLE] students who... a) are literate, and able to speak, read, write, listen, [COMMUNICATORS] and think [THINKERS] effectively in English and another language; b) are technologically literate; c) apply mathematical, social, and scientific skills in real-life situations; d) appreciate and participate in the arts. [Note: ALL CAPS indicate the 10 International Baccalaureate Learner Profile attributes integrated into the ISM school wide learner outcomes adopted in the original charter.] (Priority S)

"It is impossible to describe the average ISM student, because the student body is incredibly diverse on multiple dimensions. ISM considers this non-majority model one of its greatest strengths. ISM values differences among students as assets that enrich the learning exchange in every classroom every day, and the ISM staff works to respect and teach every unique student as an individual. This commitment has led to ISM becoming a model of student population balance on the dimensions of ethnicity and race. Standing out as hallmarks of the depth of ISM's diversity, no single racial/ethnic group exceeds 40 percent of the student population and 20-30 percent of students come from multicultural homes. A commitment to socioeconomic diversity has also been embedded in the DNA of ISM since the Charter School opened" (ISM Charter, p.77).

During the 2021-22 school year, enrollment has increased in the target areas for student representation such that ISM will be impacted positively with a higher number of students identified as: (1) low-income students as determined by Free or Reduced-Price Meals (FRPM) eligibility (currently 31%); and (2) prospective First-Generation College Graduates (FGCG) as determined by no parent/guardian having earned a bachelor's degree or equivalent (currently 41%). These changes are positive impacts based on the recent changes that were made to ISM's lottery preferences as outlined in the school's Charter which was renewed in 2020.

## Reflections: Successes

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

Due to the COVID-19 pandemic, state law has suspended the reporting of state indicators on the 2021 Dashboard. Based on a review of performance on all available state indicators (<https://www.cde.ca.gov/ds/ad/coviddatareporting.asp>) and local performance indicators including those on the Dashboard, progress towards LCAP goals, local self-assessment tools (iReady, classroom based assessments, etc.), input from educational partners, ISM is most proud of the following:

- ~recognizing contribution of staff through health and wellness initiatives
- ~increasing diversity through the shift to "diversity by design" as outlined in ISM's Charter
- ~addressing student social emotional needs through the school's counseling program
- ~accelerating student learning through diagnostic and periodic targeted evaluation
- ~emphasizing inclusion through the school's special education department
- ~embracing international mindedness and perspective taking in the curriculum and community
- ~incorporating a whole child approach where IB attributes and community building foster student action and service

During this next year, ISM plans to build upon this success by further recognizing staff contributions through additional compensation, promoting equity opportunities in the lottery through targeted community messaging, and expanding the counseling services through community partners. Further, the school will intentionally target acceleration approaches through evaluation, provide additional staff training on inclusion, and celebrate the school's multiple cultures and perspectives through community events.

Specifically, the improvements principally directed towards English learners and low-income students has led to the following improved performance for these students, as demonstrated by a school wide increase in their annual growth scores through our local diagnostic evaluations. Further, these students have been indirectly supported through efforts at the school to emphasize multiple cultural perspectives as a way to foster feelings of connectedness in the community. Research from WIDA (World-class Instructional Design and Assessment) supports the essential tie between an EL student's environmental context and their confidence in their ability to succeed independently with language. (<https://wida.wisc.edu/sites/default/files/resource/Guiding-Principles-of-Language-Development.pdf>)

## Reflections: Identified Need

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

Locally collected data from iReady diagnostic and periodic evaluations has indicated the need for additional support school wide in mathematics. Currently, school wide iReady data shows that approximately 50% of students are on or above grade level in reading targets, but approximately 30% of students are on or above grade level in math targets. Specific data indicates that geometry is an area of need for all students, including EL and low-income students. ISM has been participating in a Math grant focused on implementing Complex Instruction as an approach to increase math confidence and skills in upper elementary and middle school students. The school has seen significant anecdotal improvement

in both student and teacher confidence during math lessons since beginning the year-long coaching sessions. ISM plans to continue these coaching sessions in the upcoming school year.

Additionally, data collected from school climate surveys indicate that although parents, students, and teachers agree that safety is not a concern on campus, feeling connected to the community is an area of growth. Data from the previous year to this year indicate a -9%, -5%, and -3% decrease in feelings of connectedness respectfully. This data aligns with parent feedback that was provided during ongoing weekly meetings with administration as well as strategic planning meetings which included ISM community members from various student groups including low-income, EL, special education, and multiple races/ ethnicities. COVID protocols early in the year impacted parent connectedness significantly and to some degree student connectedness. As the school eased some protocols and allowed students to mingle in larger groups and parents to begin volunteering on campus, there was ample anecdotal evidence that feelings of connectedness were on the rise. Through outdoor assemblies, middle school dances, field day, on-campus project presentations, and parent volunteers, the school began to build back community. ISM plans to continue to implement these events and include more when possible in the upcoming school year.

Lastly, based on feedback during strategic planning meetings as well as strategic planning surveys, parents, students, and teachers indicated the following three areas of growth for the school: teacher compensation, community building, and mental health support. ISM has begun the process of realigning teacher salaries for the upcoming school year and will continue to work on all aspects of teacher compensation. This year, ISM added a part-time school counselor to the staff based on previous feedback from parents, students, and staff. Additional plans, in partnership with Monterey County Behavioral Health, have been put in place to add access to Tier III mental health supports for both general education and special education students in the following school year. Through these supports the school hopes to increase student sense of connectedness and community as well provide a safe educational environment where students can focus on academic success because their emotional needs will be supported.

## LCAP Highlights

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

ISM has chosen to carry over its four goals from the previous three-year LCAP to this three-year edition. This was recommended across multiple stakeholder groups, with those advocating lauding the continuity created by carrying these goals forward from when first introduced in ISM strategic planning conducted in 2007, before the LCAP was first introduced. These ongoing goals fit perfectly with the concept of maintenance goals as introduced with the previous round of LCAP development.

## Comprehensive Support and Improvement

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

## Schools Identified

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

N/A

## Support for Identified Schools

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

N/A

## Monitoring and Evaluating Effectiveness

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

N/A

## Engaging Educational Partners

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

We have built ISM on a foundation of open exchange within a culture of family involvement. All members of our ISM family have engaged in notable educational innovation. There is a pervasive sense throughout our community that the success of this endeavor stems from working toward common goals including funding and continuous school improvement. Toward this end, we encourage communication and exchange of ideas among students, parents, faculty, staff, and trustees. As an IB World School, we remain open to fresh concepts and methodologies, and we nurture a culture that invites such input. During meetings held at least eight times per year during non-school hours, our Board of Trustees welcomes comment and input from all interested parties. Meanwhile, our administration hosts 45-minute weekly coffees where parents can ask questions and get answers regarding any current activity or concern. Parent/guardian involvement lies at the heart of our school community. One of the primary reasons for the success of ISM students, and a special accomplishment in its own right, is the involvement of our families.

The school asks parents/guardians to support their children's learning at home each and every day by discussing the day's learning and providing a conducive homework environment. ISM also requests that they provide hours of family service to the school. Typically in a school year, more than 500 individuals including parents, grandparents, students, and siblings contribute nearly 14,000 volunteer Family Hours of service. The hundreds of service opportunities include daily classroom support, school library management, monthly Saturday site workdays, annual fundraising and special events, school committees such as the Strategic Advisory Team that drives the LCAP planning and updating process, and much more. Often grandparents and the students themselves join parents/guardians to complete volunteer assignments. The ISM Family Liaison ensures that all families can find meaningful and workable opportunities to do their part. Aside from the important positive operational impact of these Family Hours, because parents/guardians get involved in virtually every aspect of the organization, they ensure continuous highly informed educational partner input that helps shape every dimension of the school. While we had significantly less volunteers and volunteer hours completed on campus this year due to COVID protocols, we still maintained a robust cadre of volunteers for non-campus support and high numbers of parents participating in virtual meetings to provide feedback.

Given the ongoing direct involvement of educational partners in all aspects of our school, to develop input for our LCAP, we have turned first to these ongoing involvement mechanisms:

**Board of Trustees:** Per our charter, at least half of the members of our board must be parents. In reality, during the 2021-2022 school year, 6 of 10 trustees were parents of current students. As such, the trustees represent our most important educational partner—our families—essentially filling the function of a parent advisory group.

**Board of Trustees meetings:** Every one of the eight board meetings scheduled each year serves as an opportunity for the general public to provide input to the board during designated public comment times as well as direct participation in the action item discussions.

**Strategic planning:** As a standing advisory committee of the board, the Strategic Planning Committee oversees an annual strategic planning process that leads to update of the ISM Strategic Plan and this Local Control and Accountability Plan. A separate Strategic Advisory Team comprises representatives of the following major educational partners: families, teaching staff, non-teaching staff, administration, board, ISM Community Connection (PTA equivalent), and community partners. These representatives consider multiple data sources in proposing the annual strategic plan and LCAP updates for board approval. This includes an annual assessment of progress toward target outcomes based on the metrics and targets built into the LCAP. The metrics address all state and local priorities.

**Annual end-of-year surveys:** For the past 15 years, ISM has administered surveys for students, parents/guardians, and staff near the end of each school year. These surveys target feedback regarding specific areas of the academic program and overall operations through both Likert-scale items and open ended questions about what stands out and what needs improvement.

**Coffee with the Admin:** Weekly coffee events provide an opportunity for parents/guardians to meet with the ISM director and other administrators for updates, questions, and answers. Specific topics change each month; however, the overall focus always remains on providing each and every one of ISM's

students with a great school experience. ISM invites parents/guardians to attend for the whole 45 minutes or to drop in for any part. The discussion is conducted in English with concurrent interpretation provided in Spanish upon request.

Staff meetings: ISM releases students at 12:55 every Wednesday. The ISM staff then engages in a variety of meetings and professional development and planning activities until 5:00pm. The meetings and activities provide extensive opportunity for staff input into all aspects of the school's programs and operations. ISM also has a team-leader structure that provides for representative input from K-2, 3-5, and 6-8 teaching teams via bi-weekly teacher-leader meetings.

Informal interaction: Because ISM, as articulated in the charter, recognizes the importance of educational partner involvement and welcomes family presence in classrooms and on campus (during non-pandemic times), extensive opportunity exists for informal discussion among ISM trustees, administrators, staff, students, and parents/guardians. Within an atmosphere of continuous improvement, this results in extensive input regarding what is working and what might make ISM better. To maximize the voice of all educational partners in shaping the LCAP, we typically progress through the following specific inputs over the course of the year:

May – June: We administer our annual end-of-year surveys. All parents/guardians are asked to complete the survey. All grade 3-8 students complete the online student survey during homeroom/advisory time. The survey is optional for grade K-2 students, at the discretion of the teacher. The director also asks all employees to complete the staff survey before departing for the summer. All told, this results in input from approximately 300 students, 200 parents/guardians, and 30 staff members each year.

June – August: The ISM administration compiles and interprets the survey data, implementing programs and changes based on the findings as well as the current strategic plan and LCAP.

January – February: The ISM administration completes mid-year strategic plan and LCAP assessments based on the metrics and targets built into the plans.

February – March: As part of its process, the Strategic Advisory Team requests midyear input either directly or via a survey or other mechanisms to specifically identify areas of need to guide the revision of the strategic plan and LCAP. The director invites school community input into strategic planning and the LCAP via ParentSquare, the school's internal communications solution. These channels provide specific opportunity for input regarding the state priorities and priorities identified in the ISM charter. Moreover, they provide for input regarding services and programs for all subgroups including ethnic groups, English Learners, low-income students, foster students, homeless students, and students with disabilities.

February – May: The Strategic Advisory Team engages in a series of four to five meetings where the various educational partner representatives create the annual update of the ISM Strategic Plan and LCAP based on all available data, and forward recommended updates to the ISM Board of Trustees. In the process, the SAT conducts a full review and analysis of the end-of-year survey data, LCAP assessment, and midyear input to guide revisions to the strategic plan and LCAP.



February-June: The ISM Board conducts open discussions of the ISM Strategic Plan and LCAP annual updates during monthly board meetings and then approves the updates by June.

March-April: Each year, the SAT asks all ISM classes from kindergarten to 8th grade to have discussions about “where the big people who make school decisions should spend the school’s time and money in the next year to make the school better.” Each class then sends two representatives to present the class input to the SAT. This student input process is an important piece of the annual strategic plan and LCAP process.

May: The ISM Board of Trustees conducts a Public Hearing regarding the LCAP at its regularly scheduled monthly meeting, with the director specifically inviting input regarding services and programs for all subgroups including ethnic groups, English Learners, low-income students, foster students, homeless students, and students with disabilities. ISM conducted the Public Hearing for this 2021-2024 LCAP on May 10, 2022.

June: The administration finalizes the annual LCAP based on all inputs described above, and ties expenditures at the program level between the annual budget and the LCAP. The ISM Board of Trustees conducts a final discussion of the LCAP and budget, then adopts both at its official annual meeting. The ISM Board of Trustees is scheduled to approve this 2021-2024 LCAP on June 14, 2022. Educational Partners had a 4-week window to provide input to the draft in advance of official adoption.

A summary of the feedback provided by specific educational partners.

## ALL EDUCATIONAL PARTNERS

Now that we have transitioned back to full face-to-face on-campus teaching and learning as the next big step during the COVID crisis of the past two years, all of our educational partners have emphasized how important it is to continue to focus on student and staff safety, student and adult mental wellness, and recovering learning that has been lost while solidifying gains in character and capabilities developed in the face of the challenges of the pandemic. In addition, all educational partners emphasized repeatedly that a strong focus on building back community is needed after such a long time away from the campus and one another.

## STUDENTS

Consistent with feedback over the years, through classroom discussions, surveys, open-ended response invitations, and anecdotal data, our K-8 students again focused largely on specific improvements within these three general areas...

- (1) Improve outdoor areas including fields and playgrounds.
- (2) Improve facilities, specifically bathrooms and backpack storage.
- (3) Pay teachers better.
- (4) Improve technology (better Chromebooks, more iPads, build a computer lab)
- (5) Construct areas that students want and love (butterfly house, pool, swings)

## TEACHERS

Consistent with feedback over the years, through staff meeting discussions, surveys, open-ended



response invitations, and anecdotal data, our K-8 teachers focused largely on these five general areas...

- (1) Improve teacher pay
- (2) Provide more time to learn and plan (additional sub days, team collaboration, and PD)
- (3) Increase resources for math and writing (PD, aides, cohesive K-8 curriculum).
- (4) Improve technology (replace older staff MacBooks, tech PD, implement iPads).
- (5) Offer more aides in classrooms so teachers can provide more targeted support.

## PARENTS

Through weekly coffees, town hall meetings, committee and interest group discussions, surveys, open ended response invitations, and anecdotal data. This year our K-8 parents focused largely on these three general areas...

- (1) Provide more individualized support for students (after-school tutoring, more instructional aides, social emotional and mental health resources, special education services, better identification of student needs).
- (2) Focus on representation and inclusion as the school rebuilds connectedness for all community members.
- (3) Provide more opportunities for parents to get involved again and build back community following the pandemic (volunteer during school, volunteer outside of school hours, special interest groups, get more parents involved in school leadership).
- (4) Improve teacher pay and compensation to retain and attract excellent teachers.

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

Several major aspects of the LCAP were directly influenced by various educational partners.

First, staff and parents agreed to keeping the same four goals that have organized our strategic planning since 2007. They are clear and encompassing to these key educational partners, and they represent "staying the course" rather than "shifting with the winds." Based on this feedback we decided to carrying on with our four goals as "maintenance" goals. Thus, we retained the goals that have guided us for nearly 15 years thanks to parent and staff agreement.

Second, we received significant parent and staff feedback that the LCAP has been un-understandable and generally inaccessible to them due to the length, complexity of the format, and lack of clarity around the purpose. In response, while knowing that the requirements and template for the LCAP are not under our control, rather state mandated, we decided to simplify as much as possible as we continue with the 2021-2024 LCAP. Given that the Planned Actions are ultimately the most important element of the LCAP given that they commit us to spending our time and our money in specific areas, we decided that simplification there was most important. Further, staff, parents, and admin were in agreement that keeping the list manageable is critical to making sure we make progress in some areas rather than "trying to figure out everything at once."

Third, we picked our eight actions for 2022-2023 based on input from our educational partners, including parents and staff. Following the recommendation from administration, there was strong partner agreement to maintain the previous actions. The decision to keep previous actions was based on the sentiment that there was additional development that could be made in those key areas. The action

items are outlined as follows:

(1) Special education: parent feedback particularly identified special education resources and services as an area where students need more individualized support.

(2) Expanded learning opportunities: staff and parent feedback strongly endorsed making tutoring the focus of our ELO grant and plan.

(3) Enhanced math curriculum and instruction: through analysis of local assessment data, the K-8 teaching staff has recognized the ongoing need for major efforts to further develop our math program to ensure that all students benefit from enhancements.

(4) Visual and performing arts curriculum and instruction: parents and students continue to remind the school leadership that inclusion of the arts makes a huge difference for the student experience at ISM.

(5) Literacy support: parents of English learners and teaching staff particularly emphasized the need to continue our ongoing support of student literacy development while pursuing new actions, particularly noting that the numeracy focus of enhanced math should be additive and not take away from literacy support in any way.

(6) Safety of campus facilities: various educational partners, still emphasized the importance of safety in the face of the ongoing nature of the pandemic.

(7) Board of Trustees development: while only parents and staff involved with the board, its committees, and related planning and activities possessed the knowledge necessary to make this a priority area for action, those in the know strongly supported an ongoing focus on improving board recruitment, roles, terms, transitions, goals, fundraising, community building, etc.

(8) Enrollment outreach: board members, who are primarily parents, and administrative staff members strongly called attention to the need to develop marketing communications around ISM's equity lottery preferences and the amazing opportunity created for low-income students and prospective first-generation college graduates to access this high-performing charter school.

## Goals and Actions

### Goal

Goal #	Description
Goal 1	Comprehensive, International Educational Program (Addresses state priorities 1, 2, 4, 5, 7, and 8, and local priorities M, P, and S)

### An explanation of why the LEA has developed this goal.

ISM has developed this maintenance goal to ensure ongoing focus on the mission, philosophy, and purpose of the school as articulated in its charter. ISM recognizes the need for and commits to delivering a comprehensive, international educational program—characterized by highly effective teaching and learning—that produces students who are conscientious, compassionate, and responsible citizens of the world; who are confident, free-thinking, motivated, multilingual, and ethical individuals; and who see multiple perspectives and have lifelong learning habits.

## Measuring and Reporting Results

Metric #	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-24
Authorization by the International Baccalaureate for the Primary Years Programme (grades K-5) and Middle Years Programme (grades 6-8)	Authorized for the PYP and MYP (2020-2021)	Authorized for the PYP and MYP (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Authorized for the PYP and MYP
Percentage of instructional units referencing internationalism, international-mindedness, or other international references in the target learning outcomes	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

Percentage of instructional units referencing the IB Learner Profile or one or more of its attributes in the target learning outcomes	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Implementation of state board adopted academic content and performance standards for all students as evidenced by the percentage of instructional units referencing applicable California state standards (State Priority 2: State Standards, Part A)	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

A broad course of study including courses described for grades K to 6 and the adopted course of study for grades 7 and 8, as evidenced by the percentage of the subjects listed in the California Education Code as part of a broad course of study that are taught for 3,000 minutes or more per school year in each grade (State Priority 7: Course Access, Part A)	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
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Percentage of students schoolwide and in each significant subgroup achieving at least one grade level of progress each academic year as evidenced by maintaining at least the same performance level relative to grade level on state board of education certified statewide assessments year-over-year (State Priority 4: Pupil Achievement, Part A)	82.4 percent schoolwide (2017-2018 to 2018-2019) NOTE: These are the latest years for which data is available due to the federal waiver of standardized testing due to the pandemic.	approximately 50% of students are on or above grade level in reading targets (2021-2022) approximately 30% of students are on or above grade level in math targets (2021-2022) NOTE: iReady local assessment data due to inaccessibility of CAASPP data	[Intentionally Blank]	[Intentionally Blank]	70 percent schoolwide and for each significant subgroup
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Percentage schoolwide and of significant subgroups outperforming their respective state averages for scores on the California School Dashboard based on state board of education certified statewide assessments (State Priority 4: Pupil Achievement, Part A)	100 percent (2020-2021)	approximately 50% of students are on or above grade level in reading targets (2021-2022) approximately 30% of students are on or above grade level in math targets (2021-2022) NOTE: iReady local assessment data due to inaccessibility of CAASPP data	[Intentionally Blank]	[Intentionally Blank]	100
Percentage of units incorporating student inquiry activities and addressing student understanding	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of units specifying strategies/activities for differentiation, including those for English Learners	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

Percentage of English learners who make progress toward English proficiency year-over-year as measured by the English Language Proficiency Assessments for California (ELPAC) (State Priority 4: Pupil Achievement, Part E)	67.5 percent (2020-2021)	40.91 percent number of students with overall score of Level 4-well developed since ELPAC results are not accessible for this year (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	70 percent
English learner reclassification rate (State Priority 4: Pupil Achievement, Part F)	65.4 percent in 2 years; 86.5 percent in 3 years; 98.1 percent in 5 years (2020-2021)	48.7 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	65 percent in 2 years; 85 percent in 3 years; 95 percent in 5 years
Average number of fieldtrips and campus events per class per term	0.0 (2020-2021 pre-pandemic)	0.0 (2021-2022 due to the pandemic)	[Intentionally Blank]	[Intentionally Blank]	2.0 minimum number of fieldtrips and campus events per class section per term
Number of middle-years sports offerings	5 for boys; 5 for girls (2019-2021 pre-pandemic)	4 for boys, 4 for girls (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	5 for boys; 5 for girls



Average daily attendance rate (State Priority 5: Pupil Engagement, Part A)	96.4 (2019-2020 pre-pandemic)	94.0 (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	96.0 percent
Percentage of students chronically absent (10+ percent of school days) (State Priority 5: Pupil Engagement, Part B)	1.4 percent (2019-2020 pre-pandemic)	19 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	< 3.0 percent
Percentage of middle years students dropping out (State Priority 5: Pupil Engagement, Part C)	0 percent (2020-2021)	0 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0 percent
Percentage of instructional units including curriculum-aligned assessments relative to articulated criteria, standards, and target outcomes	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

Percentage of programs and services documented as necessary for low-income students, English learners, and foster youth that are unaddressed, planned but unfunded, funded but not implemented, implemented but not integrated, and fully integrated into the regular program of study (State priority 7, part B)	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 0 implemented but not integrated 0 fully integrated into the regular program of study (2020-2021)	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 0 implemented but not integrated 100 percent fully integrated into the regular program of study (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 0 implemented but not integrated 100 percent fully integrated into the regular program of study
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Percentage of programs and services documented as necessary for special education students that are unaddressed, planned but unfunded, funded but not implemented, implemented but not integrated, and fully integrated into the regular program of study (State priority 7, part C)	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 0 implemented but not integrated 0 fully integrated into the regular program of study (2020-2021)	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 50 percent implemented but not integrated 50 percent fully integrated into the regular program of study (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Programs and services documented as necessary: 0 percent unaddressed 0 percent planned but unfunded 0 funded but not implemented 50 percent implemented but not integrated 50 percent fully integrated into the regular program of study
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Percentage of English learners who have access to all regular ISM programs and services—including standards-based academic programs—at the same level as the average English-proficient student, while also having full access to the English Language Development standards (State priority 2, part B)	80 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of students administered a local comprehensive diagnostic assessment at least twice per year, once to measure baseline data and again to measure annual typical growth (State Priority 4: Student Achievement)	100 percent (2021-2022)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

Percentage of students placed in tiered intervention/ MTSS program using either diagnostic assessment data or other qualitative or quantitative data from formative, interim, and summative assessments. (State Priority 7: Implementation of State Standards)	1 percent (2021-2022)	1 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	5 percent
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Actions

Action #	Title	Description	Total Funds	Contributin
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Action #	Title	Description	Total Funds	Contributin
Action #1	Special education	After 1 year as its own LEA within the El Dorado County Charter SELPA, ISM's special education department continues to develop and expand. An educational psychologist, 2 educational specialists, and 2 part-time special education aides will be hired, while other services will be contracted. All necessary instructional and assessment materials will be purchased along with the technology needed by the staff, who will also receive appropriate professional development including International Baccalaureate training. Operating as its own LEA for special education has ensured better alignment between the mission, vision, programming, and philosophies of ISM as a whole and those of the special education program. It has positively increased ISM's ability to integrate special education services into regular classrooms as the least-restrictive environment. Further, on-site and just in time access to a full special education team has fostered a stronger emphasis on understanding and implementing inclusive practices by general education teachers. The special education team will provide bi-weekly collaborative planning meetings as well as professional development trainings in the upcoming school year to further develop school wide inclusive mindsets and practices.	\$681,138.00	No
Action #2	Expanded learning opportunities	ISM will implement the following Expanded Learning Opportunities components to provide supplemental instruction and support to identified students in need. First, ISM will re-purchase the previously identified diagnostic/formative/benchmarking assessment solution that will provide teaching staff with individual student data and suggested acceleration strategies. The assessment solution will also provide targeted individual lessons for students. Second, ISM will provide	\$139,950.00	No

Action #	Title	Description	Total Funds	Contributin
		<p>additional staff professional development, including how to effectively use the advanced aspects of the assessment solution, accelerated learning strategies in math and language, targeted skill building, inclusion based practices, social-emotional health training, counseling and mental health services interfacing, and whole-family engagement. Third, ISM will allocate substitute staff pay or regular staff weekend pay for time spent on the listed professional development opportunities outside of regular Wednesday afternoon professional development and annual staff days. Fourth, ISM will invest stipend money to pay teachers and other staff members for additional hours dedicated to providing after-school accelerated learning supports for students, with an expectation of three hours of tutoring time per week for each participating employee. Fifth, at least 10% of the funding will be used to re-hire paraprofessionals (i.e. instructional aides) to provide supplemental instruction and support in grade K-2 classes and/or grade 6-8 math classes, with the supplemental instruction and support prioritized for English learners and students with disabilities. Sixth, ISM will work to connect families and students with existing social-emotional and other supports, including school-provided meals and snacks, and increase investment in counseling and mental health diagnostics and services for students. Seventh, ISM will pay stipends to 2-4 teacher-leaders for overall leadership and oversight of this Expanded Learning Opportunities plan.</p>		

Action # Title		Description	Total Funds	Contributin
Action #3	Enhanced math curriculum and instruction	ISM will continue to invest supplemental funds on staffing, materials, facilities, and training for an Enhanced Math program that reduces class size or increases classroom staffing to achieve a better instructor-student ratio. National Assessment of Educational Progress (NAEP) data shows that smaller groups significantly correlate with higher math achievement. The smaller groups allow more targeted instruction and greater differentiation that will lead to faster advances in mathematical literacy, particularly for English Learners and low-income students.	\$42,967.00	Yes
Action #4	Visual and performing arts curriculum and instruction	ISM will continue to invest supplemental funds on staffing, materials, facilities, and training for K-8 Visual Arts and Performing Arts instruction delivered by credentialed professional artists. The benefits of arts instruction make a particular difference for high needs students. A Blueprint for Creative Schools, a 2015 report to state superintendent of public instruction Tom Torlakson, prepared under the direction of the CREATE CA coalition, argues in favor of spending LCFF funds on the arts. Citing Preparing Students for the Next America: The Benefits of an Arts Education, published by the Arts Education Partnership in 2013, the blueprint states that “the arts can boost test scores and achievement in literacy, English language arts, and mathematics, especially for English Learners and low-income students.”	\$184,320.00	Yes



Action #	Title	Description	Total Funds	Contribution
Action #5	Literacy support	ISM will continue to invest supplemental funds in a Literacy Supports program that provides instructional aides, materials, and training to provide ELA and Spanish instruction, EL and RFEP student supports, and academic and behavioral interventions, targeting the differentiated needs of unduplicated students and students in general. While we have implemented the Literacy Support program charterwide, it particularly serves the needs of current English Learners, RFEP students, and low-income students to the extent that low income serves as a predictor of the need for increased literacy acquisition and intervention supports.	\$70,082.00	Yes

## Goal Analysis 2021-22

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

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

Outcome #1.12 Field trips- 0.0 field trips due to COVID restrictions

Outcome #1.13 Sports Offerings- 4 instead of 5 sports due to beginning of school year COVID restrictions

Outcome #1.14 ADA- Increased number of absent students due to Omnicron wave in P2 attendance period

Outcome #1.15 Chronic Absenteeism- Increased number of long term absent students due to Omnicron wave in P2 attendance period

Action #1.1 Special Education- ISM had significant start up costs for this new program. Testing materials, training needs, resources, and furniture are additional costs. Due to an increase in the number of initial reviews as well as lottery students entering the school, ISM overspent this category relative to what was budgeted. Additional employees were hired as support personnel to provide all conditions needed based on student IEPs.

Action #1.2 Expanded Learning Opportunities- Expenditure is less than budget due to limited interest to provide tutoring by staff which delayed start of plan. Alternative tutoring program did not support needs. Current plan requires additional hires which is difficult due to scarcity of applicants. Plan is pending.

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

The Budgeted Expenditures for Special Education were underestimated for this school year. Due to this being the first year with ISM as the LEA, the school relied on comparative research from other Charter Schools in the area as well as previous spending suggestions from our former Special Education contractor. Estimated Actual Expenditures were higher due to several reasons: 1. Purchasing testing and curriculum resources to create the infrastructure for the program was higher than anticipated. 2. Additional students who required significant support services were enrolled in the school after the start date and were not originally accounted for in the initial budget. 3. Securing additional appropriately certified personnel as well as paraprofessionals to provide specific support services for the increased caseload of special education students created an increase above the initial budget. At this time, the Estimated Actual Expenditures will likely be more than double what was budgeted.

The Budgeted Expenditures for Expanded Learning Opportunities were not fully realized for this school year. Estimated Actual Expenditures were lower due to several reasons: 1. The submitted ESSER III plan included an in-school/ after school tutoring program provided by current teaching staff; however, staff quickly recognized the impact on their health and well being by working additional hours and requested that the program be altered. 2. The altered program relied on an outside vendor to provide in-school/ after school tutoring but due to the small size of our school ISM was not able to contract with various providers. 3. ISM created a third plan intent on directly hiring paraprofessionals to provide in-school/ after school tutoring support but hiring efforts have been significantly hampered possibly due to the pandemic. At this time, the Estimated Actual Expenditures will likely be zero compared to what was budgeted.

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

Considering the goal to "provide a comprehensive, International educational program," our planned actions were effective in making progress toward those ends. Establishing and developing our own special education program has created a much more comprehensive program at our school. Not only are our identified students with IEPs benefitting, our general education students are also benefiting from the collaboration between the two departments. There is a stronger emphasis on inclusion in all aspects on campus from informal staff dialogue to planned weekly meetings. Biweekly General Ed/ SPED teacher collaboration sessions have been created and teachers have implemented a much broader range of accommodations and interventions in classrooms to support all students.

Hiring a dedicated paraprofessional for 6-8 grade math classes has also made a positive impact on our goal to provide a comprehensive educational program. Biweekly planning sessions with the paraprofessional has increased teacher dialogue on ways to differentiate for targeted students through the explicit use of the paraprofessional's contact time. Further, having an additional adult in the room during math classes benefits all students by providing quicker access to support when needed. Lastly, having a paraprofessional who works across all three grade levels provides comprehensive planning insights into what is transferring in the curriculum vertically.

Like the math paraprofessional, increasing literacy support through paraprofessionals in grades K-2 has strengthened our educational program. Specifically, the paraprofessionals are able to identify specific students that need targeted support, plan with the teachers of the grade levels to use their contact time for identified students, and provide just in time support by increasing the number of adults in class. By providing targeted support to specific students, our students have not only closed the gap in their academics but have received skill and social emotional support through their successes enabling them to experience a more holistic educational experience.

Lastly, our ongoing emphasis on providing dedicated teachers for visual and performing arts continues to develop not only a comprehensive program, but an internationally minded one as well. Supporting educational research, our school continues to see students who may be academically challenged flourish in our arts programs. These students continue to receive an opportunity to showcase their talents in alternative learning environments where they are supported and lauded for their unique achievements. In addition to providing a positive holistic experience, our teachers specifically seek out cultural and global connections through the arts to emphasize multiple perspectives within the curriculum. Each subject has 2-3 units specifically focused on bringing in cultures and perspectives of the students in our school and around the world.

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

Following the recommendation from administration, there was strong partner agreement to maintain this goal, desired outcomes and actions. The decision to keep previous outcomes and actions was based on the sentiment that there was additional development that could be made in those areas. Further, survey feedback and discussions with the Strategic Advisory Team indicated that the current metrics and desired outcomes were still in alignment with school wide priorities. The metrics and outcomes are effective in measuring the goal and are recommended to remain for further development in the upcoming school year.

As a result of the analysis of this goal, and the analysis of the state and local data collected and analyzed, the following changes will be made to the goal in order to best meet the needs and positive outcomes of students: two additional outcomes were added after lengthy reflection considering current school and local contexts. The outcomes are outlined as follows:

Percentage of students administered a comprehensive diagnostic assessment at least twice per year, once to measure baseline data and again to measure annual typical growth (State Priority 4: Student Achievement)

Percentage of students placed in tiered intervention using either diagnostic assessment data or other qualitative or quantitative data from formative, interim, and summative assessments. (State Priority 7: Implementation of State Standards)

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

## Goal

Goal #	Description
Goal 2	Efficient Development and Management of Resources (Addresses state priorities 1, 4, 5, and 6, and local priorities M and P)

An explanation of why the LEA has developed this goal.

ISM recognizes the need for and commits to achieving efficient development and safe, secure management of its fiscal, physical, and human resources, because they provide the means to achieve the school's mission and vision, and deliver its ambitious programs.

## Measuring and Reporting Results

Metric #	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-24
Percentage of students expelled (State Priority 6: School Climate, Part B)	0 percent (2020-2021)	0 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0 Percent

Percentage of students in all significant subgroups, parents, and staff indicating an average to strong sense of school safety and connectedness on annual end-of-year climate surveys (State Priority 6: School Climate, Part C)	Safety: parents 99 percent, students 88.5 percent, staff 92 percent (2020-2021) Connectedness: 96 percent, students 71.5 percent, staff 91 percent (2020-2021)	Safety: parents 96 percent, students 74.5 percent, staff 86 percent (2021-2022) Connectedness: 87 percent, students 66.5 percent, staff 88 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	90 percent per group
Authorization by the International Baccalaureate Primary Years Programme (grades K-5) and Middle Years Programme (grades 6-8)	Authorization for the PYP and MYP (2020- 2021)	Authorization for the PYP and MYP (2021- 2022)	[Intentionally Blank]	[Intentionally Blank]	Authorization for the PYP and MYP
Annual net change in fund balance over any two-year period	\$9,633 (2018-2019 and 2019-2020)	\$-47,226 (2019-2020 and 2020-2021)	[Intentionally Blank]	[Intentionally Blank]	Positive number
Cash reserve expressed as assets/average expenses (defensive interval)	3.85 months (2020-2021)	3.76 months (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	> 3 months

Percentage of fundraising areas (ISM Foundation, grant writing, matching funds, community collaborations, corporate sponsorships, earned revenues, and direct donations) with articulated guidelines and strategies	88 percent (2020-2021)	85 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of students who have sufficient access to the standards-aligned instructional books, materials, supplies, information resources, and technologies necessary to achieve adopted curriculum goals (State Priority 1: Basic Services and Conditions, Part B)	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

Number of academic programs, student activities, employee activities, and administrative operations lacking functional space comprising sufficient square footage	1 academic program (2020-2021)	1 academic program (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0
Number of functional spaces presenting safety or health concerns that have existed more than a month without appropriate steps taken to maintain facilities in good repair (State Priority 1: Basic Services and Conditions, Part C)	0 (2020-2021)	0 (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0
Percentage of employees with an overall rating of Achieves or Exceeds Expectations or the equivalent on their most recent performance review (i.e. a positive review in the most recent year)	89.8 percent (2020-2021)	80 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	90 percent

Percentage of employees with an overall rating below Achieves Expectations, or the equivalent, in three consecutive years (i.e. negative reviews for three straight years)	0 percent (2020-2021)	0 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0 percent
Percentage of teachers appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching (State Priority 1: Basic Services and Conditions, Part A)	88.5 (2020-2021)	85 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of employees with a performance review completed and in their personnel file within the last two years	93.9 percent (2020-2021)	96 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Average total weekly planning minutes per teacher	At least 400 minutes (2020-2021)	At least 400 minutes (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	At least 400 minutes



Percentage of Wednesday afternoons dedicated to early release for professional development	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of students suspended one or more times (State Priority 6: School Climate, Part A)	0 percent (2020-2021)	0.021 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	<2 percent
Percentage of staff indicating on end of year survey that the compensation package is adequate to above average for their personal and professional needs.	72 percent (2021-2022)	72 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	90 percent
Percentage of part time aides/ paraprofessionals who received additional training during the school year to improve targeted supports	0 percent (2021-2022)	0 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent

## Actions

Action #	Title	Description	Total Funds	Contributor
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Action # Title		Description	Total Funds	Contribution
Action #1	Safety of campus facilities	Safety of campus for regular face-to-face instruction at 100 percent capacity with appropriate health measures and facilities improvements in place.	\$30,000.00	No

## Goal Analysis 2021-22

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

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

The school received additional funding as part of the Safe Return to In-Person Instruction and Continuity of Services Plan and the Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan Act. Part of this funding was utilized to ensure the safe reopening of campus for regular face-to-face instruction at 100 percent capacity with appropriate health measures and facilities improvements in place. ISM planned to use this money, in part, to ensure the campus had the proper cleaning supplies and sanitizer in place for the reopening of school. In addition, the school planned to utilize this funding to provide an additional custodian to ensure all health measures were in place according to the local health department guidelines. Following the submitted reopening plan in March 2021 and the ESSER III funding plan and review submitted in December 2021, the school completed the planned actions regarding health and sanitation measures. There were no substantive differences in the plans and implementation.

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

There were no material differences between what was budgeted for purchase to promote appropriate health measures and facilities improvements for the safe reopening of campus for regular face-to-face instruction at 100 percent capacity.

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

The planned actions were 100% effective in achieving the goal. The school purchased a variety of materials to promote health measures such as cleaning materials, masks, sanitizer, etc. An additional custodian was also hired which ensured timely and ongoing cleaning of the campus. These measures helped ensure that the school remained open for face to face instruction at 100 percent capacity

throughout the year. Our goal, the efficient development and management of resources, was achieved through these actions because the additional custodian helped ensure that staff and students received the necessary materials to remain healthy in a timely manner.

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

Following the recommendation from administration, there was strong partner agreement to maintain this goal, desired outcomes and action. The decision to keep the previous outcomes and action was based on the sentiment that there was additional development that could be made in those areas. Further, survey feedback and discussions with the Strategic Advisory Team indicated that the current metrics and desired outcomes were still in alignment with school wide priorities. The metrics and outcomes are effective in measuring the goal and are recommended to remain for further development in the upcoming school year.

As a result of the analysis of this goal, and the analysis of the state and local data collected and analyzed, the following changes will be made to the goal in order to best meet the needs and positive outcomes of students: two additional outcomes were added after lengthy reflection considering current school and local contexts. The outcomes are outlined as follows:

Percentage of staff indicating on end of year survey that the compensation package is adequate to above average for their personal and professional needs.

Percentage of part time aides/ paraprofessionals who received additional training during the school year to improve targeted supports.

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

## Goal

Goal #	Description
Goal 3	Clear Governance and Operations Structures (Addresses state priorities 1, 3, 5, and 6, and local priorities M and P)

## An explanation of why the LEA has developed this goal.

ISM commits to clear and effective governance and efficient operations structures as foundational to maintaining and improving all aspects of the school, including teaching and learning.

## Measuring and Reporting Results

Metric #	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-24
Authorization by the International Baccalaureate Primary Years Programme (grades K-5) and Middle Years Programme (grades 6-8)	Authorization for the PYP and MYP (2020-2021)	Authorization for the PYP and MYP (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Authorization for the PYP and MYP
Percentage of required policies approved and published within three months of identification of the requirement	100 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Percentage of staff positions listed on the ISM organization chart with current job specifications	78 percent (2020-2021)	100 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Annual instances of non-compliance with data reporting requirements and deadlines	0 (2020-2021)	0 (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	0

Percentage of staff members completing annual safety and compliance trainings	60 percent (2021-2022)	60 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
XXX	XXX	XXX	[Intentionally Blank]	[Intentionally Blank]	XXX

## Actions

Action #	Title	Description	Total Funds	Contributor
Action #1	Board of Trustees Development	ISM will transitioned from its 2016-2021 charter to its new 2021-2026 charter on July 1, 2021. Part of that transition included the elimination of the board preference in the school's enrollment lottery. Given that the perk of guaranteed admission for board trustee children played a significant role in the attraction of highly capable and professionally varied board members, the board itself has recognized the need to re-develop. Thus, the board will continue its project to rethink board structure, trustee recruitment, expectations, roles, responsibilities, leadership succession, operations, expectations, and more. In addition to clearly articulating all of these dimensions, goals include better positioning the board to: 1) reflect the vast diversity of ISM students and their families, 2) serve as a resource to the school administration, and 3) raise funds in support of the school and its ambitious programs, including being an IB World School that connects with other International Baccalaureate schools across the globe.	\$15,000.00	No

## Goal Analysis 2021-22

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

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

ISM's goal was to commit to clear and effective governance and efficient operations structures as a foundation to maintaining and improving all aspects of the school, including teaching and learning. The planned actions were to rethink board structure, trustee recruitment, expectations, roles, responsibilities, leadership succession, operations, expectations, and more. In addition to clearly articulating all of these dimensions, goals included: 1) reflect the vast diversity of ISM students and their families, 2) serve as a resource to the school administration, and 3) raise funds in support of the school and its ambitious programs. The board began the school year with a board retreat aimed at beginning to determine how best to meet the actions and goals that were planned. Throughout the year, the board addressed these plans in various ways including creating new working committees to expand the board's support as a resource to the administration. During the mid term, the board needed to refocus their plans to leadership succession due to the retirement of the director and board chair at the end of the year. This departure from the board goals 1 (diversity) and 3 (fundraising) was the only notable difference in planning and action.

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

The only material difference between budgeted expenditures and actual expenditures was due to the postponement of the second board retreat which was to be held in April this year. This change meant that the money that was budgeted was not spent as allocated.

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

ISM is making ongoing progress toward the goal of clear and effective governance. The actions of the working committees helped the board restructure and revisit their supporting role for the administration of the school. Further, the working groups created solid inroads in building parent involvement and furthering diversity and inclusion discussion amongst community members. These are significant steps in transmitting clear communication about the importance of representation for the school as well as effective support for the school staff.

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

Following the recommendation from administration, there was strong partner agreement to maintain this goal, desired outcomes and action. The decision to keep the previous outcomes and action was based on the sentiment that there was additional development that could be made in those areas. Further, survey feedback and discussions with the Strategic Advisory Team indicated that the current metrics and desired outcomes were still in alignment with school wide priorities. The metrics and outcomes are effective in measuring the goal and are recommended to remain for further development in the upcoming school year.

As a result of the analysis of this goal, and the analysis of the state and local data collected and

analyzed, the following changes will be made to the goal in order to best meet the needs and positive outcomes of students: one additional outcome was added after lengthy reflection considering current school and local contexts. The outcome is outlined as follows:

Percentage of staff members completing annual safety and compliance trainings.

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

## Goal

Goal #	Description
Goal 4	Exemplary communications and relations (Addresses state priorities 3 and 6, and local priorities M, P, and S)

An explanation of why the LEA has developed this goal.

ISM commits to maintaining exemplary communications and relations within the ISM Community, with its educational partners, and within the world beyond. These connections establish a strong fundamental foundation for achieving the ISM mission and vision. Moreover, they develop resources, such as volunteer hours and financial support, that create capacity to deliver the school's ambitious International Baccalaureate curriculum and other ISM programs.

## Measuring and Reporting Results

Metric #	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-24

Authorization by the International Baccalaureate Primary Years Programme (grades K-5) and Middle Years Programme (grades 6-8)	Authorization for the PYP and MYP (2020-2021)	Authorization for the PYP and MYP (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Authorization for the PYP and MYP
Percentage of families actively engaged in the school community through participation in the educational process, completing volunteer family hours of service to the school including involvement in school decision-making, or supporting school fundraising efforts	100 percent of families (2020-2021)	60 percent (2021-2022) NOTE: Combination of recurring family share donations, weekly parent volunteers, average parent attendance at events, average parent attendance at meetings. Numbers were low due to COVID protocols.	[Intentionally Blank]	[Intentionally Blank]	100 percent of families
Average rating on each question related to communication effectiveness on the annual parent/guardian survey	3.5 on a 5-point scale (70 percent) (2020-2021)	86 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	4.0 on a 5-point scale (or the equivalent)



Number of partnerships with other schools, IB programs, school districts, and other educational organizations documented to directly support one or more ISM strategic goals	10 active partnerships (2020-2021)	10 active (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	20 active partnerships
Number of partnerships with nonprofits, foundations, government agencies, and other entities documented to directly support one or more ISM strategic goals	8 active partnerships (2020-2021)	15 active (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	20 active partnerships
Annual enrollment applications: total applications; Equity Category applications (i.e. low-income students); Standard Category applications	497 total applications; 162 Equity Category; 335 Standard Category (2020-2021)	399 total applications; 157 Equity Category; 242 Standard Category (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	500 applications with 50 percent coming from students who qualify for the Equity Category (i.e. low-income students) 500 total applications; 50 percent Equity Category; 50 percent Standard Category

Average rating on each question related to the transparency and understandability of board and administration decisions on annual staff and parent/guardian surveys	3.5 on 5-point scale (70 percent) (2020-2021)	93 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	4.0 on a 5-point scale (or equivalent)
ISM develops, maintains, and assesses the effectiveness of a community in-reach plan that includes strategies and tactics for seeking and obtaining parent input in school decision making; promoting parent participation in programs for low-income students, English learners, and foster youth; and promoting parent participation in programs for students with disabilities. (State priority 3, parts A-C)	Plan partially developed and rated "not very effective" (2020-2021)	Ongoing development with a rating of "needs additional work" (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	Plan fully developed and rated "highly effective"

Percentage of school advisory groups, such as the Strategic Advisory Team, that reflect the diversity and demographics of the ISM community through the representation of at least 1 member of each of the priority student populations (low-income, English language learners, special education). (State priority 3)	50 percent (2021-2022)	50 percent (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	100 percent
Number of community events aimed at gathering the families of 2 or more grade levels during the school year	2 events (2021-2022)	2 events (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	6 events

Number of whole school opportunities for families to learn about topics to support whole child development at home and school (Parent University, Town Hall meetings, etc.)	1 (2021-2022)	1 (2021-2022)	[Intentionally Blank]	[Intentionally Blank]	6 events
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## Actions

Action #	Title	Description	Total Funds	Contributor
Action #1	Enrollment outreach	Within the constraints of a lottery-based open-enrollment construct, ISM will develop a comprehensive enrollment outreach plan with particular focus on encouraging low-income students, prospective first-generation college graduates, special education students, and English learners and their families to become informed regarding ISM and to make the choice whether or not to apply to the school based on the school's mission, vision, and programs being a good match for their educational needs and interests. This plan will be supported by appropriate collateral materials, events, wrap-around services that support these applicants.	\$35,000.00	No

## Goal Analysis 2021-22

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

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

ISM's goal was to commit to maintaining exemplary communications and relations within the ISM Community, with its educational partners, and within the world beyond. The planned action was to develop a comprehensive enrollment outreach plan with particular focus on encouraging low-income students, prospective first-generation college graduates, special education students, and English learners and their families to become informed regarding ISM. The administration began the school year with significant challenges to ensure the health and safety of students due to the reopening of the school after hybrid learning in the spring of 2021. This emphasis on health and safety diverted the administration's attention away from planning a comprehensive enrollment outreach plan. Throughout the year, the administration discussed starting the plan; however, limited forward movement occurred. During December and January, in the midst of another COVID increase due to the Omnicron strain, the administration again needed to refocus their plans to the health and safety of the ISM community. This departure from the administration's goal to further develop the outreach plan was a notable difference in the school's planning and action. Further, this departure directly affected the planned action because the enrollment time period coincided with the Omnicron increase. This meant that continuing to work on the planned action following the February enrollment lottery was less of priority.

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

The Budgeted Expenditures for developing a comprehensive enrollment outreach plan were not fully realized for this school year. Estimated Actual Expenditures were lower due to several reasons: 1. The development of the plan was delayed due to the ongoing need to orchestrate and maintain the health and safety of our community for the start of the school year. 2. The development of the plan was again delayed due to the ongoing need to orchestrate and maintain the health and safety of our community during the January upswing in COVID cases due to Omnicron. 3. The development of the plan was again delayed due to the fact that the Enrollment lottery had passed and there wasn't time to enact the plan for this school year. At this time, the Estimated Actual Expenditures will likely be zero compared to what was budgeted.

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

ISM has stalled in making progress toward the goal of developing a comprehensive enrollment and outreach plan. Late in the school year, the administration hired a Head of Development, Finance, and Compliance. This new position is charged with increasing the public profile of the school through development targets. While no thorough outreach plan has been made yet, this planned action will have a direct positive result in the overall goal which is effective communication and relations with the community. The outreach plan will develop our ability to communicate with the multiple community groups in the area as well as foster and develop a relationship with them.

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

Following the recommendation from administration, there was strong partner agreement to maintain this goal, desired outcomes and action. The decision to keep the previous outcomes and action was based on the sentiment that there was additional development that could be made in those areas. Further, survey feedback and discussions with the Strategic Advisory Team indicated that the current metrics and desired outcomes were still in alignment with school wide priorities. The metrics and outcomes are effective in measuring the goal and are recommended to remain for further development in the upcoming school year.

As a result of the analysis of this goal, and the analysis of the state and local data collected and analyzed, the following changes will be made to the goal in order to best meet the needs and positive outcomes of students: three additional outcomes were added after lengthy reflection considering current school and local contexts. The outcomes are outlined as follows:

Percentage of school advisory groups, such as the Strategic Advisory Team, that reflect the diversity and demographics of the ISM community through the representation of at least 1 member of each of the priority student populations (low-income, English language learners, special education). (State priority 3)

Number of community events aimed at gathering the families of 2 or more grade levels during the school year.

Number of whole school opportunities for families to learn about topics to support whole child development at home and school.

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

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

Projected LCFF Base Grant	Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$3,558,484.00	\$269,192.00	\$0.00

### Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
6.1%	6.16%	\$213,408.76	0%

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

## Required Descriptions

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

### ENHANCED MATH CURRICULUM AND INSTRUCTION

In first considering the needs of foster youth, English learners, and low-income students, we found that, in 2019 San Francisco Unified School District (SFUSD) reported that students from detracked heterogeneously grouped middle school math programs were more likely to take advanced high school math courses than students who had been tracked into accelerated or developmental middle school math courses. Moreover, nearly all student racial-ethnic groups from the SFUSD study showed an increase in the percent of students taking courses beyond Algebra 2 as compared to previous years. Boaler (2008) reported that 41 percent of students from detracked, heterogeneously grouped math classes took advanced courses such as precalculus and calculus compared to 27 percent of students that followed a traditional tracked math pathway; and that students from heterogeneously grouped math classes showed a significant reduction in the achievement gap between groups of students belonging to different ethnic groups. Given this research, ISM has implemented heterogeneous grouping in 6th, 7th and 8th grade math classes as a way to promote high levels of mathematics learning for all students, with a goal of ISM students placing in Math 2 (or above) in 9th grade. This placement ensures that they will be able to take advanced math courses in high school and is an objective that is aligned with our equity and inclusion policy. However, heterogeneous grouping alone is not sufficient in supporting students access to advanced math in high school. The research data from both SFUSD and Boaler (2008) show that thoughtful pedagogy and targeted student support are necessary towards achieving equitable learning outcomes for students in heterogeneously grouped classes. Rubin (2006) reported that the most successful instances of heterogeneous grouping in math were coupled with structural interventions such as providing support to

individual students as needed and building a years-long curriculum that promotes vertical alignment of core mathematical concepts and skills. Accordingly, the 6th, 7th and 8th grade math teachers have an in-class aide dedicated to supporting individual and small groups of students with personalized attention and appropriate challenges. This aide also takes part in lesson planning with the teachers, better informing the targeted intervention they provide to students.

## VISUAL AND PERFORMING ARTS CURRICULUM AND INSTRUCTION

In first considering the needs of foster youth, English learners, and low-income students, we found extensive data indicating that a broad course of study that includes arts, language, and physical education increases the engagement and success of these high-needs students in their overall education. The benefits of arts instruction make a particular difference for high needs students. A Blueprint for Creative Schools, a 2015 report to state superintendent of public instruction Tom Torlakson, prepared under the direction of the CREATE CA coalition, argues in favor of spending LCFF funds on the arts. Citing "Preparing Students for the Next America: The Benefits of an Arts Education," published by the Arts Education Partnership in 2013, the blueprint states that "the arts can boost test scores and achievement in literacy, English language arts, and mathematics, especially for English Learners and low-income students." While arts instruction could be delivered to high-needs students in isolation, we believe that schoolwide implementation achieves the greatest gains for high-needs students. Two reasons rise to the top in our analysis. First, if high-needs students are separated from their peers in order to take courses perceived as "non-academic," they will likely see themselves as "non-academic," which completely undermines the value of these courses. Second, high-needs students often excel in classes that foster creative self-expression. Isolating them with each other in these classes would deny them the opportunity to stand out among all of their peers rather than just others considered high-needs.

## LITERACY SUPPORT

In first considering the needs of foster youth, English learners, and low-income students, we found that, rather than centering on academics and innate abilities, their "high needs" reflect missing supports that most other students get in their homes from their families and other influencers. Thus, we emphasize overall support of these children as we help them develop their literacy skills. We believe that schoolwide implementation best serves the needs of high-needs students as this broad scope of service has the greatest chance of ensuring that all students with lagging literacy acquisition—whether in English as primary language, English as an additional language, or Spanish as an additional language—will receive the extra supports they need to succeed. Moreover, it allows small groupings of students with similar literacy needs where they can work together and provide peer supports regardless of whether they qualify as members of the unduplicated subgroup. Likewise, it allows small groupings of students from divergent backgrounds where high-achieving students can directly influence the success of high-needs students in a managed learning environment where all are safe and respected.

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

As computed using the Fiscal Crisis Management & Assistance Team (FCMAT) Local Control Funding Formula calculator, ISM will receive approximately \$269,192 in supplemental funds based on projected enrollment of unduplicated students. ISM does not qualify for concentration grant funds. Strictly from a dollars perspective, ISM has budgeted more than this amount for increased services that meet the specific needs of unduplicated students as noted above, thus quantitatively meeting the 6.10% requirement.



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

N/A

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



## 2022-23 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-Personnel
Totals	\$521,926.00	\$430,023.00	\$163,258.00	\$83,250.00	\$1,198,457.00	\$652,970.00	\$545,487.00

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	Special education	Students with disabilities	\$248,223.00	\$336,973.00	\$42,692.00	\$53,250.00	\$681,138.00
1	2	Expanded learning opportunities	All	\$0.00	\$93,050.00	\$46,900.00	\$0.00	\$139,950.00
1	3	Enhanced math curriculum and instruction		\$30,301.00	\$0.00	\$12,666.00	\$0.00	\$42,967.00
1	4	Visual and performing arts curriculum and instruction		\$144,320.00	\$0.00	\$40,000.00	\$0.00	\$184,320.00
1	5	Literacy support		\$64,082.00	\$0.00	\$6,000.00	\$0.00	\$70,082.00
2	1	Safety of campus facilities	All	\$0.00	\$0.00	\$0.00	\$30,000.00	\$30,000.00
3	1	Board of Trustees Development	All	\$0.00	\$0.00	\$15,000.00	\$0.00	\$15,000.00
4	1	Enrollment outreach	All	\$35,000.00	\$0.00	\$0.00	\$0.00	\$35,000.00

## 2022-23 Contributing Actions Tables

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover - Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1 plus 5)
\$3,558,484.00	\$269,192.00	07.56%	6.16%	13.72%	\$238,703.00	00.00%	6.71%

Totals by Type	Total LCFF Funds	Total Funds
<b>Total:</b>	\$238,703.00	\$297,369.00
<b>LEA-wide Total:</b>	\$0.00	\$0.00
<b>Limited Total:</b>	\$0.00	\$0.00
<b>Schoolwide Total:</b>	\$238,703.00	\$297,369.00

Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	3	Enhanced math curriculum and instruction	Yes	Schoolwide	English Learners, Foster Youth, Low Income	ISM	\$30,301.00	0%

Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	4	Visual and performing arts curriculum and instruction	Yes	Schoolwide	English Learners, Foster Youth, Low Income	ISM	\$144,320.00	00%
1	5	Literacy support	Yes	Schoolwide	English Learners, Foster Youth, Low Income	ISM	\$64,082.00	0%

## 2021-22 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals	\$1,214,823.00	\$969,063.00

Last Year's Goal #	Last Year's Action #	Action Title	Contributed to Increased or Improved Services?	Last Year's Total Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	Special education	No	\$587,454.00	\$608,561.00
1	2	Expanded learning opportunities	No	\$250,000.00	\$93,300.00
1	3	Enhanced math curriculum and instruction	Yes	\$42,967.00	\$22,975.00
1	4	Visual and performing arts curriculum and instruction	Yes	\$184,320.00	\$163,544.00
1	5	Literacy support	Yes	\$70,082.00	\$48,450.00
2	1	Safe reopening of campus facilities	No	\$30,000.00	\$28,825.00
3	1	Board of Trustees Development	No	\$15,000.00	\$3,408.00
4	1	Enrollment outreach	No	\$35,000.00	\$0.00

## 2021-22 Contributing Actions Annual Update Table

Totals	6. Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 4 from 7)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Actual Percentage of Improved Services (%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
Totals	\$213,545.00	\$297,369.00	\$0.00	\$297,369.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Action Title	Contributed to Increased or Improved Services?	Last Year's Total Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services (%)	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1	Enhanced math curriculum and instruction	Yes	\$30,301.00	\$0.00	0.00%	0.00%
1	2	Visual and performing arts curriculum and instruction	Yes	\$144,320.00	\$0.00	0.00%	0.00%
1	3	Literacy support	Yes	\$64,082.00	\$0.00	0.00%	0.00%

## 2021-22 LCFF Carryover Table

Totals	9.	6.	LCFF	10. Total	7. Total	8. Total	11.	12. LCFF	13. LCFF
	Estimated Actual LCFF Base Grant (Input Dollar Amount)	Estimated Actual LCFF Supplemental and/or Concentration Grants	Carryover - (Input Percentage from Prior Year)	Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)	Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Percentage of Improved Services (%)	Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	LCFF Carryover — (12 divided by 9)
Totals	\$3,464,428	\$203,545	6.016%	12.32%	\$0.00	0.00%	0.00%	\$426,817	52.32%



## Instructions

- Plan Summary
- Engaging Educational Partners
- Goals and Actions
- Increased or Improved Services

*For additional questions or technical assistance related to the completion of the LCAP template, please contact the local COE, or the California Department of Education's (CDE's) Local Agency Systems Support Office by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

## Introduction and Instructions

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

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

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

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

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

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

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

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

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

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any

performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

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

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

## Plan Summary

### Purpose

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

### Requirements and Instructions

#### General Information

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

#### Reflections: Successes

Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward

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

### **Reflections: Identified Need**

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

### **LCAP Highlights**

Identify and briefly summarize the key features of this year’s LCAP.

### **Comprehensive Support and Improvement**

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

#### **Schools Identified:**

Identify the schools within the LEA that have been identified for CSI.

**Support for Identified Schools:**

Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

**Monitoring and Evaluating Effectiveness:**

Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## Engaging Educational Partners

### Purpose

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

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

are encouraged to keep this goal in the forefront when completing this section.

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

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

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

## Requirements and Instructions

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

## Local Control and Accountability Plan:

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

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

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

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

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

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

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

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

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process



- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

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

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

### Requirements and Instructions

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

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

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

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

### **Focus Goal(s)**

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

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

### **Broad Goal**

*Goal Description:* Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the

goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

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

### **Maintenance of Progress Goal**

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

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

### **Required Goals**

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

*Consistently low-performing student group(s) criteria:* An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP

based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- *Consistently low-performing student group(s) goal requirement:* An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.
- *Goal Description:* Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- *Explanation of why the LEA has developed this goal:* Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

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

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

## Measuring and Reporting Results:

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

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

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently

submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

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

Complete the table as follows:

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

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023-24)
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Enter information in this box when completing the LCAP for <b>2021–22.</b>	Enter information in this box when completing the LCAP for <b>2021–22.</b>	Enter information in this box when completing the LCAP for <b>2022–23.</b> Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24.</b> Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25.</b> Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> or when adding a new metric.
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## Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

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

### **Actions:**

Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action.

Enter the total amount of expenditures associated with this action.

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

### **Actions for English Learners:**

School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language

acquisition programs, as defined in EC Section 306, provided to students and professional development activities specific to English learners.

### **Actions for Foster Youth:**

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

### **Goal Analysis:**

Enter the LCAP Year

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

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



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

### Purpose

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

### Requirements and Instructions

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

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

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

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

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

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

**Required Descriptions:**

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

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

**Principally Directed and Effective:**

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

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

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

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

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

- After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
- In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
- These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically

disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students.

(Measurable Outcomes [Effective In])

## **COEs and Charter Schools:**

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

## **For School Districts Only:**

### **Actions Provided on an LEA-Wide Basis:**

#### **Unduplicated Percentage > 55%:**

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

#### **Unduplicated Percentage < 55%:**

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

### **Actions Provided on a Schoolwide Basis:**

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

**For schools with 40% or more enrollment of unduplicated pupils:**

Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40% enrollment of unduplicated pupils:**

Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

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

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

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of

Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

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

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

Provide the following descriptions, as applicable to the LEA:

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

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

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

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

Complete the table as follows:

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

Action Tables



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

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

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

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

## Data Entry Table

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

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

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

- *2. Projected LCFF Supplemental and/or Concentration Grants*: Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- *3. Projected Percentage to Increase or Improve Services for the Coming School Year*: This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated



pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.

- *LCFF Carryover — Percentage*: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- *Total Percentage to Increase or Improve Services for the Coming School Year*: This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

**Goal #:**

Enter the LCAP Goal number for the action.

**Action #:**

Enter the action's number as indicated in the LCAP Goal.

**Action Title:**

Provide a title of the action.

**Student Group(s):**

Indicate the student group or groups who will be the primary beneficiary of the action by entering "All", or by entering a specific student group or groups.

**Contributing to Increased or Improved Services?:**

Type "Yes" if the action is included as contributing to meeting the increased or improved services; OR, type "No" if the action is not included as contributing to meeting the increased or improved services.

If "Yes" is entered into the Contributing column, then complete the following columns:

**Scope:**

The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the

LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.

### **Unduplicated Student Group(s)**

Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.

### **Location:**

Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools”. If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans”. Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades K-5), as appropriate.

### **Time Span:**

Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year”, or “2 Years”, or “6 Months”.

### **Personnel Expense:**

This column will be automatically calculated based on information provided in the following columns:

#### **Total Personnel:**

Enter the total amount of personnel expenditures utilized to implement this action.

#### **Total Non-personnel:**

This amount will be automatically calculated based on information provided in the Total Personnel column and the

Total Funds column.

**LCFF Funds:**

Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).

- *Note:* For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.

**Other State Funds:**

Enter the total amount of Other State Funds utilized to implement this action, if any.

**Local Funds:**

Enter the total amount of Local Funds utilized to implement this action, if any.

**Federal Funds:**

Enter the total amount of Federal Funds utilized to implement this action, if any.

**Total Funds:**

Enter the total amount of Federal Funds utilized to implement this action, if any.

**Planned Percentage of Improved Services:**

For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest

hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.

- As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

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

## Contributing Actions Table

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

## Annual Update Table

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

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

## Contributing Actions Annual Update Table

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

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

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated

pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

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

### ***Contributing Actions Table***

#### 4. Total Planned Contributing Expenditures (LCFF Funds)

- This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column

#### 5. Total Planned Percentage of Improved Services

- This percentage is the total of the Planned Percentage of Improved Services column

Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)

- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

## Contributing Actions Annual Update Table

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

#### 6. Estimated Actual LCFF Supplemental and Concentration Grants

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

#### 4. Total Planned Contributing Expenditures (LCFF Funds)

- This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

## 7. Total Estimated Actual Expenditures for Contributing Actions

- This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)

## Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)

- This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)

## 5. Total Planned Percentage of Improved Services (%)

- This amount is the total of the Planned Percentage of Improved Services column

## 8. Total Estimated Actual Percentage of Improved Services (%)

- This amount is the total of the Estimated Actual Percentage of Improved Services column

## Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)

- This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

## LCFF Carryover Table

## 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)

- This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.

## 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)

- This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).

## 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

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

## 13. LCFF Carryover — Percentage (12 divided by 9)

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

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