

# REVIEW OF PETITION FOR THE ESTABLISHMENT OF THE INSTITUTE OF HUMAN DEVELOPMENT CHARTER SCHOOL

NOVEMBER 24, 2023

On September 14, 2023, the Jurupa Unified School District (“District”) received a petition (“Petition”) to establish “The Institute of Human Development” charter school (“Charter School” or “IHD Charter School”) in the District pursuant to the provisions of Education Code section 47600 et seq.<sup>1</sup>

## PROCEDURES AND TIMELINE

A petition to establish a charter school may be submitted to a school district after the petition is signed by a number of parents/guardians of pupils equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the charter school for its first year of operation. (Educ. Code § 47605(a)(1).)<sup>2</sup> The petition must include a prominent statement that a signature on the petition means that the parent/guardian is meaningfully interested in having their child attend the charter school, and the petition must be attached to the proposed charter document. (Educ. Code § 47605(a)(3).)

- No later than 60 days after receiving a petition,<sup>3</sup> the governing board of the school district shall hold a public hearing on the provisions of the charter, at which time the governing board of the school district shall consider the level of support for the petition by teachers employed by the school district, other employees of the school district, and parents.
- After review of the petition and the public hearing, the governing board shall either grant or deny the charter within 90 days of receipt of the petition, except that this date may be extended by an additional 30 days if both parties agree to the extension.
- The governing board of the school district shall publish all staff recommendations regarding the petition at least 15 days before the public hearing at which the governing board of the school district will either grant or deny the charter. At the board meeting, Petitioners must be provided equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings. (Educ. Code § 47605(b).)

A school district governing board that grants a charter school petition becomes the chartering authority and has supervisory responsibilities over the charter school. If a school district governing board denies a charter petition, the petitioner may choose to submit the petition to the county board of education within 30 days of the denial. (Educ. Code § 47605(k)(1)(A)(i).)

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<sup>1</sup> All citations are to the California Education Code unless otherwise specified.

<sup>2</sup> The law also provides a teacher signature option, but that option was not used in this case.

<sup>3</sup> A petition is deemed “received” by the governing board, and timelines begin, on the day the petitioner submits a petition to the district office along with a signed certification that the petitioner deems the petition complete. (Educ. Code § 47605(b).)

## LEGAL STANDARDS AND CRITERIA

In reviewing a petition to establish a charter school, a school district must be guided by the intent of the Legislature that charter schools are and should become an integral part of the California educational system and that the establishment of charter schools should be encouraged. (Educ. Code § 47605(c).) The governing board of the school district is required to consider the academic needs of the pupils the school proposes to serve and shall grant a charter “if it is satisfied that granting the charter is consistent with sound educational practice and with the interests of the community in which the school is proposing to locate.” (Educ. Code § 47605(c).) A governing board may not deny a charter petition unless it makes written factual findings specific to the petition to support one or more of the following findings:

1. The charter school presents an unsound educational program for the pupils to be enrolled.
2. The petitioners are demonstrably unlikely to successfully implement the program described in the petition.
3. The petition does not contain the number of signatures required by Section 47605(a).
4. The petition does not contain an affirmation of each of the conditions in Section 47605(e).
5. The petition does not contain reasonably comprehensive descriptions of fifteen elements: (1) educational program, including LCAP annual goals; (2) measurable pupil outcomes; method of measuring pupil outcomes; (4) governance structure; (5) employee qualifications; (6) health and safety procedures; (7) means to achieve a pupil population balance; (8) admission policies and procedures; (9) financial audits; (10) suspension, expulsion, and other involuntary removals; (11) retirement system coverage; (12) public school attendance alternatives; (13) employee return rights; (14) dispute resolution; and (15) closure procedures.
6. The petition does not contain a declaration of whether the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of collective bargaining.
7. The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposed to locate, including consideration of fiscal impact of the school.
8. The school district is not positioned to absorb the fiscal impact of the proposed charter school, based on certain statutory criteria. (Educ. Code § 47605(c).)

As part of the charter petition process, a petitioner is required to provide information regarding the proposed operation and potential effects of the charter school, including the facilities to be used by the charter school, how administrative services are to be provided, and any potential civil liability effects upon the charter school and the school district. The description of the facilities “shall specify where the charter school intends to locate.” The petitioner must also provide “financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation.” (Educ. Code § 47605(h).) If the school is to be operated by or as a nonprofit public benefit corporation, the petitioner “shall provide the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school.” (Educ. Code § 47605(h).) Finally, the law provides that “[n]o charter shall be granted under this part that authorizes the conversion of any private school to a charter school.” (Educ. Code § 47602(b).)

## BACKGROUND

### Charter Petition Submission Process

In July 2023, the District received a draft charter document from Mr. Jordan Campbell and/or his representative (“Petitioner”) for the establishment of a proposed charter school called “The Institute of Human Development.”<sup>4</sup>

On August 21, 2023, Petitioner submitted a revised charter document for consideration by the District.

On August 28, 2023, District staff informed Petitioner that the document did not include the “signed certification that the petitioner deems the petition to be complete,” as required by Education Code section 47605(b) and which triggers the commencement of timelines. It was also noted that appendices were referenced, but not attached, to the proposed charter document.

On August 31, 2023, Petitioner resubmitted the charter document with a statement, on page 8 at the end of the affirmation and declaration section, certifying that Petitioner deemed the petition to be complete.

On September 5, 2023, District staff informed Petitioner that the proposed charter document was not accompanied by parent or teacher signatures as required by Section 47605(a).

On September 14, 2023, Petitioner resubmitted the charter document, accompanied by 101 parent signatures. It was also noted by Petitioner that there was a revision to the charter document, and the September 14, 2023 version should be used as the official submission.<sup>5</sup>

On September 18, 2023, District informed Petitioner that several appendices referenced in the charter document appeared to be missing (including appendices that referenced curriculum, board member information, organizational structure, and required budget information and financial projections) and asking how Petitioner would like to proceed. It was emphasized that the required budget information was critical to the District’s review. The District also noted that the signature pages did not appear to include the required “prominent statement” that a signature means that the parent is meaningfully interested in having their child attend the charter school. At Petitioner’s request, the District agreed to keep September 14, 2023 as the date of receipt for timeline purposes and granted Petitioner a grace period up to September 22, 2023 to submit any missing information to include in the review.

On September 22, 2023, Petitioner resubmitted the proposed charter document (removing references to appendices) along with the signature pages (together referred to herein as the “Petition”). Petitioner also submitted a PDF with the file name, “IHD Annual Budget Projections” (“Budget Document”). Petitioner’s

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<sup>4</sup> “Petitioner” as used in this report refers to the lead petitioner, Jordan Campbell, or his representative. “Petitioners” as used in this report refers to Mr. Campbell and team members who have interacted with the District during the charter review process.

<sup>5</sup> The charter cover page continues to indicate, “Date Submitted: August 31, 2023,” although signatures were not received until September 14, 2023, and a final charter document was not submitted until September 22, 2023. The District agreed to use September 14, 2023 as the submission date as requested by Petitioner.

representative indicated that *“Petitioner confirmed that a prominent statement was included with the petition that the parent or legal guardian was meaningfully interested in having their child or ward attend the charter school, and the proposed charter was attached.”*<sup>6</sup>

See [Exhibit 1](#) for the Budget Document.

### **District Review and Consideration of Charter Petition**

On October 2, 2023, the District’s Board of Education (“Board”) held a public hearing to consider the terms of the proposed Charter and the level of support from teachers and other employees of the District, and from parents. At that meeting, Petitioner made a presentation to the Board and members of the public were permitted to address the Board on the proposed Charter. Several parents spoke in favor of the Petition, most of whom indicated their child(ren) were or have been members of Petitioner’s private athletic facility in Corona, California called “Winner Circle Athletics.” Speakers were enthusiastic about Winner Circle Athletics and expressed support for establishing a charter school in Jurupa.<sup>7</sup>

On November 3, 2023, the District asked Petitioners for their availability to meet to discuss the Petition and proposed Charter School operations. The parties agreed to meet on November 15, 2023.

On November 8, 2023, the District sent Petitioners a list of initial questions about the Petition and proposed Charter School operations and requested certain documentation referenced in the Petition. This included a request for the specific location where the charter school intended to locate and the names and qualifications of persons nominated to be on the initial governing board.

On November 14, 2023, Petitioners provided responses to the questions and produced supporting documentation (referred to herein as “Supplemental Information”).<sup>8</sup> See [Exhibit 2](#) for Supplemental Information submitted by Petitioners.

On November 13, 2023, members of the public had an additional opportunity to comment regarding the Charter Petition and proposed Charter School at the District Board meeting. No public comments were made at this meeting regarding the Petition.

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<sup>6</sup> The District requested documentation evidencing that the signature page was attached to the proposed charter document when circulated, along with the prominent statement that a signature on the petition means the parent is meaningfully interested in having their child attend the charter school, but no such documentation or other evidence was provided.

<sup>7</sup> Petitioners later clarified for District staff that Winner Circle Athletics provides space at its Corona facility where student athletes, who are enrolled with various charter schools, complete their schoolwork through online and independent study platforms, with Winner Circle Athletics providing in-person academic support. This education component to Winner Circle Athletics is referred to on its website as its Prep Academy. According to Petitioners, the 101 parent signatures were from parents whose children are members of Winner Circle Athletics.

<sup>8</sup> The Supplemental Information provided by Petitioners assisted the Review Team in its review but is not part of the official Petition submittal. Board action to grant or deny the Petition must be based on the official Petition submitted to the District, although the Supplemental Information may be considered to provide context and/or a better understanding of Petitioners’ intent.

On November 15, 2023, members of the Review Team met with Petitioners to ask clarifying questions about the Petition and the proposed Charter School operations. At this meeting, additional Supplemental Information was provided by Petitioners in response to questions posed by the District.

The Board is scheduled to either grant or deny the Petition on December 11, 2023 after a final public hearing. Documentation of staff findings and recommendations must be posted by the District no later than November 26, 2023 (i.e., 15 days prior to the Board meeting).

The District’s charter review team and legal counsel (“Review Team”) have carefully reviewed the Charter Petition to establish The Institute of Human Development as a charter school in the District. The information set forth below reflects the results of that review.

### **PROPOSED FINDINGS OF FACT**

The Review Team identified significant legal deficiencies relating to the proposed Petition and has several concerns regarding implementation. Based on those deficiencies and concerns, the following Findings of Fact were developed for consideration of the Board. This list is not exhaustive and should not be interpreted to mean that areas not included are legally sufficient and/or acceptable to the Review Team.

**1) The Petitioners failed to submit legally required information in connection with the Petition.**

*Education Code section 47605(h) requires that “the description of the facilities to be used by the charter school shall specify where the charter school intends to locate. The petitioner or petitioners also shall be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation. If the school is to be operated by, or as, a nonprofit public benefit corporation, the petitioner shall provide the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school.”*

After the Petition was submitted, District staff observed that information required by this Section 47605(h) was missing, and requested that information from Petitioners, but it was not provided. Specifically:

- a) Petitioners failed to specify where the charter school intends to locate, as required by law. No address is provided, and no location is specified except “within the Jurupa USD boundary.” (Petition, p. 189.)
- b) Petitioners failed to provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation, as required by law. The Budget Document that was provided does not include an operational budget, start-up costs, and cashflow for three years of operations. (See Exhibit 1, Budget Document.)
- c) Petitioners failed to provide the names and relevant qualifications of all persons whom the Petitioner nominates to serve on the governing body of the charter school, as

required by law. In response to the District’s request for this information, Petitioners provided names and biographies for seven (7) individuals who were identified as members of the charter school’s “founding group,” but it was unclear whether those individuals would be board members, employees, both, or neither, and this information is critical to analyzing the governing board members’ and executive staff’s experience and qualifications, as well as potential conflicts of interest. (See Exhibit 2, Supplemental Information.)

**2) The Petitioners are demonstrably unlikely to successfully implement the program set forth in the Petition.**

a) Lack of Facility Location or Plan. As indicated in Finding 1, the Petition does not “specify where the charter school intends to locate” as required by Education Code section 47605(h). The Petition states that the IHD Charter School plans to lease a classroom facility within the District boundaries for its initial school facility until it can secure a permanent location. (Petition, p. 189.) However, the Petition does not “specify where the charter intends to locate” and it is therefore impossible for the Review Team to determine whether the proposed location is suitable for a school, is likely to receive any necessary governmental approvals, has been properly budgeted for, and/or is otherwise an adequate and viable site to house the proposed IHD Charter School students. Petitioners also do not have a clear facility plan in place to serve students for the 2024-2025 school year and through the 2027-2028 school year. The Petition contains conflicting information as to enrollment and capacity needs. For example, the Petition states, to “ensure that The Institute of Human Development is able to provide its entire academic program and extra-curricular activities necessary for a 3<sup>rd</sup>-8<sup>th</sup> grade program” the facility will require certain types of classroom space, non-classroom space, and field space. (Petition, p. 189.) Elsewhere the Petition states the Charter School will “open in fall 2024 with grades 3<sup>rd</sup>-9<sup>th</sup> grade” (Petition, pp. 10, 32) and makes a reference to certain curriculum beginning in Transitional Kindergarten. (Petition, p. 55.) During the Interview on November 15, 2023, Petitioners explained that students will engage in a combination on-site instruction and independent study. However, there is no indication that Petitioners are prepared to address the facility needs of the students that will enroll in the school on a full-time or part-time basis.

b) Lack of Accurate and Consistent Enrollment Projections. The Petition does not include consistent enrollment projections, which are key to a sound educational plan (including facilities, funding, and staffing decisions). When discussing Targeted School Populations, the Petition projects enrollment of 200 students, serving grades 3-9 in Year 1 (2024-25) with enrollment growing to 800 students, serving grades 3-12 by Year 4 (2027-28). (Petition, pp. 32, 33.) Elsewhere, under Budgeting, the Petition states it will enroll approximately 200 students in its first year, with a plan to add 50 students per year for the next four subsequent years. (Petition, p. 185.) This would mean 350 students by Year

4, not 800 students by Year 4 as projected on pages 32 and 33. Petitioners do not have a clear, detailed, and viable plan to accommodate the students to be enrolled. Petitioners also did not submit legally compliant signature pages, which the law requires be attached to the Petition and include a statement informing parents that a signature means they are meaningfully interested in enrolling their child in the Charter School. It is reported by Petitioners that all 101 signatures are currently enrolled at Petitioner’s private athletic facility (Exhibit 2, Supplemental Information) called Winner Circle Academy (“WCA”) and are currently attending various charter schools virtually from that location. There is insufficient evidence that all parents who signed the petition will leave their current online charter school(s), which are currently operated out of WCA, and enroll in IHD Charter School at a facility within the District, or that the IHD Charter School would otherwise be able to meet enrollment projections. Information on the Budget Document includes some indication of “stakeholder engagement,” but that document references survey information that appears inaccurate. (*“At this moment, 2 months before opening, our family, student, faculty, staff and community stakeholders ranked ... their top three priorities for this upcoming school year.”*) (Exhibit 1, Budget Document, p. 3.)

- c) Lack of Financial Information. Petitioners failed to submit the budget and financial information required by law. Under Education Code section 49076(h), Petitioner is required to “provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation.” The Petition states: “Attached please find the following documents: Budget narrative; A projected first year budget including startup costs; [and] Financial projections and cash flow for the first five years of operation.” (Petition, p. 185.) However, these documents were not attached to the Petition and were not provided to the District. The District alerted Petitioner to the missing documentation on September 18, 2023 and allowed a grace period to submit the missing information, emphasizing that this budget information was critical to the District’s review. However, the final submission on September 22, 2023 did not include the required financial statements, operating budget, cash flow and financial projections. Instead, the Budget Document (see Exhibit 1) submitted by Petitioner was a Local Control Funding Formula (“LCFF”) budget overview for parents and Local Control and Accountability Plan (“LCAP”) document with minimal information about anticipated costs associated with LCAP goals. The financial information submitted by Petitioners is legally incomplete and reflects what appears to be a lack of public school finance expertise on the Petitioner’s team.
- d) Lack of Experience in Charter Development and Operations. The entire Petition is largely copied almost verbatim from a K-8 charter in Fresno County called The Golden Charter Academy (“GCA”) linked here: [GCA petition](#).<sup>9</sup> This includes the Petitioner’s introductory

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<sup>9</sup> Link is to The Golden Charter Academy charter school petition for July 1, 2021 through June 30, 2026, submitted to the Fresno Unified School District October 26, 2020, Revised December 15, 2020.

personal statement, various graphics and quotations, the description of the educational program, measurable student outcomes, assessment of those outcomes, and so forth. Even if Petitioners intended to pattern IHD Charter School exactly after the GCA charter school, this is problematic for several reasons, including that GCA does not serve high school students. For example, the IHD Petition fails to describe how it will serve high school students and/or how it will satisfy State priorities in areas relating to high school students. The Petition indicates that State Priority #4 (Student Achievement), sub-priority B (satisfy UC/CSU entrance requirement or CTE) is “n/a” (not applicable); that State Priority #4, sub-priority E (AP Exam pass rates) is not applicable; that State Priority #4, sub-priority F (College Preparedness) is not applicable; that State Priority #5, sub-priority C (Middle School Dropout Rates) is not applicable; that State Priority #5, sub-priority D (High School Dropout Rates) is not applicable; and that State Priority #5, sub-priority E (High School Graduation Rates) is not applicable. (Petition, pp. 108-112.) This duplication of the GCA K-8 charter also accounts for why the IHD Petition fails to address how parents will be informed about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements, as required by law for charters proposing to serve high school students. (Educ. Code § 47605(c)(5)(A)(iii).) In addition, the GCA charter, upon which the IHD Petition is based, does not include an Independent Study component, but Petitioners have described, when meeting with the District on November 15, 2023, that the IHD Charter School will include nonclassroom-based instruction (i.e., independent study) and a hybrid program, and “independent study” is referenced twice in the Petition in connection with course offerings. (Petition, pp. 57, 118.) Yet, the Petition does not discuss how nonclassroom-based instruction (i.e., independent study) will be part of the educational program at IHD Charter School or reflect any understanding of the legal requirements and/or limitations of nonclassroom-based instruction. These are a few examples of errors and inconsistencies identified by the Review Team that appear to be the result of duplicating a K-8 charter without making necessary revisions to tailor the charter document to the grade levels and type of program contemplated by Petitioners.

- e) Lack of Expertise Operating Public Schools. When asked for a list of individuals proposed for the Charter School’s governing board and their qualifications, Petitioners provided biographical information for its “Founding Group” of seven (7) individuals: Jordan Campbell (CEO/Founder); Teague Egan (Co-Founder, with Energy X); Renee Zappez (Head of School / Head of Elementary); Michelle Savage (Assistant Head of School/ Head of Secondary); Lindsay Campizta (Head of Business Administration & Student Services); Courtney Sparling (Program Coordinator, with Energy X); and Jake Lee (Director of Mental Development, MS). It is unclear whether members of the founding group are being proposed for the governing board, as possible administrators or other employees, and/or as contractors and/or consultants. Of those listed, two individuals Renee Zappez and Michelle Savage) appear to have public school teaching experience; one individual (Lindsay Campizta) appears to have experience as a paraeducator; and none of the



founding group members appear to have experience as a public school administrators, whether of a charter school or traditional public school. Based on information provided, it appears the founding group lacks experience in the legal and practical complexities of operating a publicly funded school.

- f) Conflicts of Interests. In the Petition, Petitioner Jordan Campbell is identified as “Chief Executive Director” and “Chief Executive Officer” and Founder/Co-Founder of The Institute of Human Development (Petition, pp. 8, 160). Under the Governance section, the CEO is also identified as “President” of The Institute of Human Development corporation. (Petition, pp. 129, 130.) The responsibilities of the Board of Directors include approving employment contracts and evaluating the performance of the CEO. (Petition, p. 129.) The Petition also states that the IHD Corporation will have a CEO, Treasurer, and Secretary, and that the CEO will function as the “Head of School” as well as “President of the Corporation.” (Petition, pp. 130, 134.) The responsibilities of the CEO are extensive, as are the responsibilities of the Head of School. (Petition, pp. 130, 131, 134, 135.) For example, the Board is responsible for approving IHD Charter School’s annual budget “with substantial input from the CEO and the school’s business advisor(s).” The Petition also states the CEO will develop the budget proposal in coordination with the finance team and will have the latitude in determining vendor selection and how funds are best used within the budget categories. (Petition, p. 188.) The Petition also indicates that “*we will be partnering with Winner Circle Athletics (WCA), California’s leading sports education brand. They would be providing access and opportunity for student-athletes with an innovative suite of on-campus and site-based training.*” (Petition, p. 56.) WCA is an LLC (for profit) that appears to be owned largely, if not exclusively, by Petitioner. At the same time, the Petition states that the Charter School will comply with conflict of interest laws, including the Political Reform Act (Government Code section 81000 et seq.) and Government Code section 1090, as set forth in Education Code section 47604.1. (Petition, pp. 7, 8, 128.) Given the many roles held by Petitioner as described in the Petition, including but not limited to CEO and President of the IHD Corporation and Head of School, the Petition itself presents inherent conflicts of interests in violation of laws designed to protect public funds and prevent public officials from participating in discussions or actions in which they have a financial interest.

**3) The Charter School presents an unsound educational program for the pupils to be enrolled.**

The Petition does not have a clear facilities plan; Petitioners did not submit the required financial documents; and the Petition does not adequately address how it will serve a high school population. The specific facts and findings set forth in Findings 2 and 3 are incorporated into this paragraph to support a finding that the Charter School presents an unsound educational program for the pupils to be enrolled.

- 4) **The Petition does not contain reasonably comprehensive descriptions in each of the required fifteen (15) elements.**

The Petition does not contain a reasonably comprehensive description of how it will serve high school students and how it will incorporate nonclassroom-based instruction (i.e., independent study) in its program offerings. The specific facts and findings set forth in Findings 2 and 3 are incorporated into this paragraph to support a finding that the Petition does not contain reasonably comprehensive descriptions each of the required fifteen (15) elements.

- 5) **The Petition does not contain the number of signatures required by Section 47605(a).**

While the Petition includes 101 signatures of individuals represented to be parents meaningfully interested in enrolling their child in the Charter School, the Review Team was unable to confirm that the Petition was circulated in compliance with law, i.e., that it included the “prominent statement” on the signature page(s) indicating that a signature means the parent is meaningfully interested in enrolling their child in the proposed Charter School. It also cannot be confirmed that the signature pages were attached to the proposed Charter document when circulated such that a parent would be able to read the proposed Charter and understand how their child will be served under its provisions. Even had the signature pages been attached to the proposed Charter, it would be impossible for parents to be “meaningfully interested” in enrolling their child in the proposed Charter School without any description of how the school would serve high school students or provide the nonclassroom-based or hybrid program intended by Petitioners. For these reasons, the Petition does not contain the required number of meaningfully interested parents as required by law.

#### **STAFF RECOMMENDATION**

District staff recommends that the Board of Education deny the Petition by **ADOPTING proposed RESOLUTION NO. 2024/25** (“Resolution of the Board of Education of the Jurupa Unified School District Denying the Petition to Establish The Institute of Human Development Charter School and Adopting Findings of Fact.”)

# # #

#### **EXHIBITS:**

Exhibit 1 – Budget Document

Exhibit 2 – Supplemental Information

# **EXHIBIT I**

Budget Document

# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Institute Of Human Development

CDS Code:

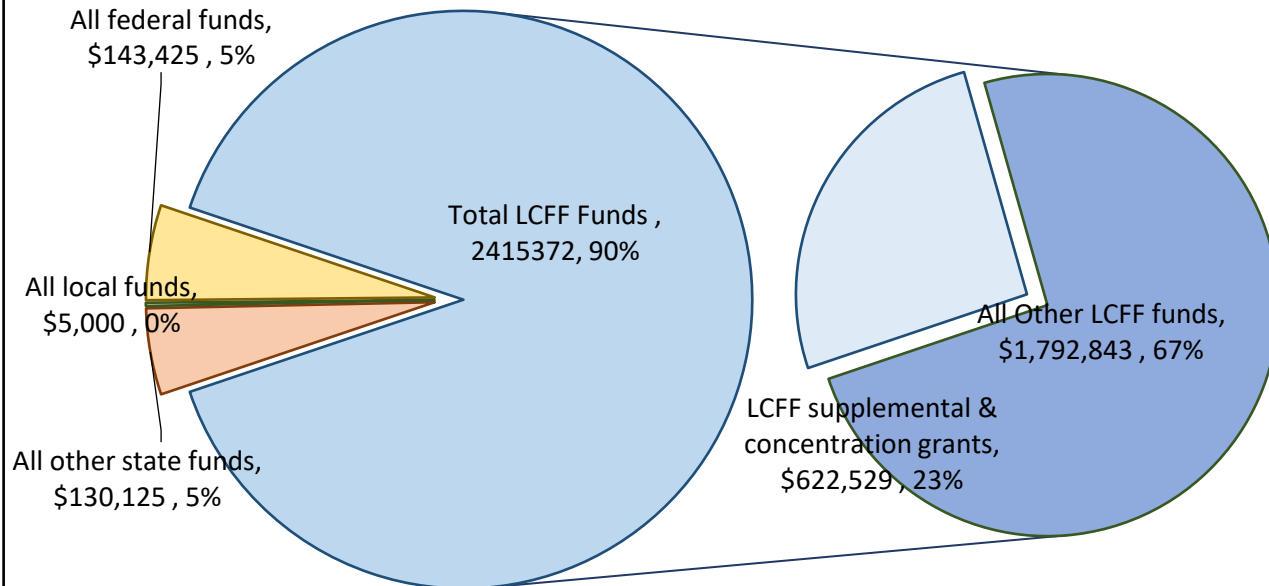
School Year: 2024 – 25

LEA contact information: Sara Ayers, Charter Lead (909) 438-3634, saraayers.wca@gmail.com

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 2024 – 25 School Year

### Projected Revenue by Fund Source

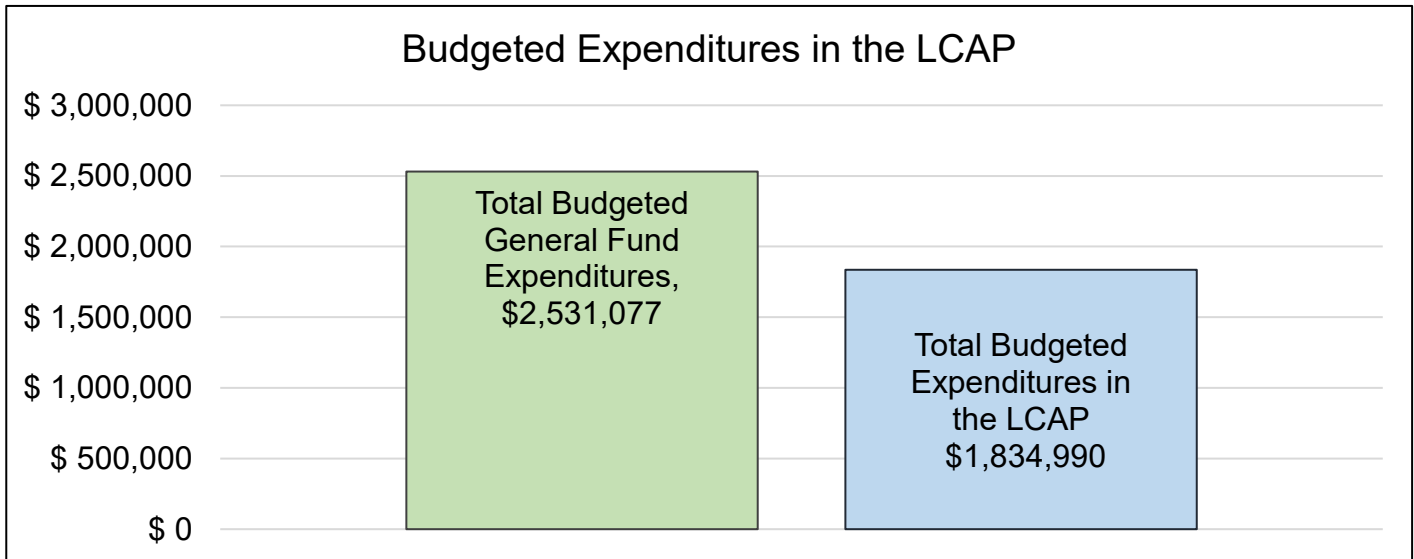


This chart shows the total general purpose revenue Institute of Human Development Charter Academy expects to receive in the coming year from all sources.

The total revenue projected for Institute of Human Development Charter Academy is \$2,693,922.00, of which \$2,415,372.00 is Local Control Funding Formula (LCFF), \$130,125.00 is other state funds, \$5,000.00 is local funds, and \$143,425.00 is federal funds. Of the \$2,415,372.00 in LCFF Funds, \$622,529.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

# LCFF Budget Overview for Parents

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



This chart provides a quick summary of how much Institute of Human Development Charter plans to spend for 2024 – 25. It shows how much of the total is tied to planned actions and services in the LCAP.

IHD Charter Academy plans to spend \$2,531,077.00 for the 2024 – 25 school year. Of that amount, \$1,834,990.00 is tied to actions/services in the LCAP and \$696,087.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

General Fund Budget Expenditures for school year 2024/25 consist of district SELPA fees, administrative and professional services, and financing costs.

Increased or Improved Services for High Needs Students in the LCAP for the 2024 – 25 School Year

# Stakeholder Engagement

A summary of the stakeholder process and how the stakeholder engagement was considered before finalizing the LCAP.

As a school that has not yet opened, our stakeholder engagement process involves outreaching to potential stakeholders, outreach to newly enrolled families and surveying families, faculty and staff as they are enrolled/hired.

Some of the strategies in place are:

- developing meaningful, two way communication platforms (e.g., ParentSquare, monthly meetings, monthly newsletters, website updates)
- identifying relevant information to share with parents pertaining to their students' transition to school
- creating surveys to begin collecting family preference data regarding meeting times, topics of interest, and ideas to contribute to IHD learning community
- reaching out to parents and families to facilitate the enrollment process either via phone or email

A summary of the feedback provided by specific stakeholder groups.

At this moment, 2 months before opening, our family, student, faculty, staff and community stakeholders ranked improved student achievement (62.5%), positive and safe school culture and climate (76.4%) and highly qualified faculty and staff (41.6%) as their top three priorities for IHD this upcoming school year. Many families expressed concerns about transitioning back to in-person instruction and giving students adjustment time to build social, emotional and academic skills as most students move from virtual and hybrid learning situations into in-person.

A description of the aspects of the LCAP that were influenced by specific stakeholder input.

As a result from stakeholder outreach, feedback from teachers, staff, students and families reflected the toll the global pandemic has taken on students and informs LCAP actions to not only support students' mental health, but to rekindle their natural curiosity and desire to learn through actions including improving teacher facility with best practices, outdoor education, and our math and literature initiatives.

# Goals and Actions

## Goal

<b>Goal #1</b>	<b>Improved Student Outcomes. We will improve outcomes for all students by improving instruction and programs.</b>
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An explanation of why the LEA has developed this goal.

Our mission is to reimagine public education in low-income communities of color to prepare conscious, critical thinkers who are equipped to graduate from college and create a more equitable and sustainable world. To achieve this, we must implement our teaching best practices

and develop effective programs for our students. Over the next three years, we will develop tiered interventions for attendance/engagement, behavior/social-emotional, and coursework/academics, that will address challenges specific to remote learning, the pandemic, social unrest, and transitions between learning modes. We intend these interventions to especially support students who are low-income, have learning exceptionalities, are foster/homeless or are learning English as an additional language.

The pandemic has impacted on student learning. Strong systems for addressing students who need intervention will help us identify and address the impacts of the pandemic.

We know that student learning is tied to student well-being, so improving student academic outcomes will be tied to improving school climate and student engagement (Goal 2).

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP English Language Arts Average Distance from Meeting Standard (DFS)	To be set Y1				Baseline + 2%
CAASPP Math Average Distance from Meeting Standard (DFS)	To be set Y1				Baseline + 2%
Percentage of English Learners who make progress on ELPAC	To be set Y1				Increase from baseline +2% each year until we are green on CA School Dashboard
Percentage of students reclassified out of those who started the year as an English Learner	To be set Y1				Increase from baseline +3% each year until we are green on CA School Dashboard
Percentage of students who meet standard on state science test	To be set in 24-25				Target to be set for 23-26 LCAP

## Actions

Action #	Title	Description	Total Funds	Contributing
1.a.	IHD Highly Qualified Faculty/Staff	IHD has prioritized securing highly qualified faculty and staff. IHD personnel will provide support developing systems for analyzing and visualizing data, planning and delivering teacher and administrator professional development,	\$802,271	[Y]

		assessment design, curriculum selection, program evaluation and strategic planning as IHD adds grade levels in the coming years.		
1.b.	Teacher Development System for IHD Best Practices	IHD begin implementation of our best practices--the Universal Design for Learning, environmental education and place-based learning. These practices are designed to meet the needs of students who are low-income, learning English, in the foster care system or experiencing homelessness. In 2024-25, we will refine our best practices for the new, post-pandemic environment. This will include identifying effective and mission-aligned distance learning practices or tools and integrating them into our in-person instruction, examining how we prioritize standards, and refining how we use assessment to inform refinements to scope & sequence, instructional practice and interventions. In each year of the LCAP, we will evaluate how well our best practices are implemented and the corresponding impact on student outcomes, including outcomes for English learners, low-income students and other student groups.	\$15,000 + Faculty costs captured in 1.a.	[Y]
1.c.	Multi-Tiered Systems of Support	In 2024-25, the student services coordinator and principal will lead the initial phase of tiered support services across campuses. They will evaluate possible partners for developing MTSS and pilot MTSS structures and strategies. In 2025-26, we will review outcomes and then broaden and expand the most effective programs. In all three LCAP years we will be identifying and providing professional development for general education teachers and grade level team leaders, department chairs and administrators to improve MTSS.	\$55,920	[Y]
1.d.	Special Education Program	Collaborate across teams to create shared systems of compliance and accountability. IHD will also be adding a full-time educational specialist and student services coordinator who will spend time becoming familiar with students, their families, their needs and programs, so they are prepared to step in to provide additional support or seamless substitution when an education specialist is absent. Through their collaboration with the faculty/staff, IHD will establish systems for the initial and compliant delivery of special education services collaborating with FUSD SELPA specialists and other program team members. With our FUSD partners, IHD will provide staff foundational PDs on special education, teaching IHD philosophy and model.	\$325,623	[Y]
1.e.	Science, Literacy & Math Initiatives	With the support of the IHD personnel, establish implementation guidelines for our new NGSS-aligned science, CCSS-aligned math and CCSS-aligned ELA curriculum across content areas with a focus on interdisciplinary teaching, Universal Design for Learning, assessment design and student work analysis to ensure growth for each student in literacy and numeracy.	\$109,000	[Y]



# Goal

<b>Goal #2</b>	<b>Climate &amp; Engagement:</b> We will develop a caring school culture that supports student wellness, is responsive to stakeholder feedback and ensures organizational sustainability
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An explanation of why the LEA has developed this goal.

IHD believes that learning best occurs through a positive school culture with safe, structured, and nurturing Environments. Students need physical and emotional safety in order to take risks and learn from their successes and their mistakes. IHD provides a safe, and nurturing environment with minimal distractions and more time for both academics and extracurricular opportunities, so IHD students enjoy school and maximize their learning. We set clearly defined and measurable high expectations for academic achievement and student conduct/behavior for all students. At IHD, our attention is focused on the whole child and energized by our mission to reimagine education in communities of color. We also understand that our students face uncertainty and change due to the pandemic and that the past two years have made the inequities our students face ever more clear. Their neighborhoods have borne the economic and health brunt of the pandemic and we understand that there will be a transition back to a fully in-person educational program. We do know that our school community is made up of stakeholders who persist, are creative, collaborative and are united resourcefully to work towards fulfilling our IHD mission. Our actions below reflect our ongoing work to improve student engagement, anticipating possible challenges with attendance and chronic absenteeism after over a year of distance learning. To increase our students' sense of safety and connectedness, especially in the midst of a pandemic, will require attention to mental health needs for our students and robust interventions for students who require additional assistance. Through partnerships, field experiences and service-learning, we will ensure their learning is meaningful and relevant to their lives in order to re-engage students whose commitment to school might have been undermined by the long break from in-person instruction. We will leverage the new tools for engaging families developed during the pandemic to build upon our partnership with families and we will support the safety and connectedness of staff, whose lives and work routines have been disrupted by the pandemic.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2025-26
Attendance	To be set Y1				96% ADA
Family input in decision-making: % of families who agree that the school allows, seeks, and welcomes their input.	To be set Y1				Increase by 5% annually until 80% is reached then maintain that level
Student Safety & Connectedness: % of students who agree or strongly agree that the school is safe on annual climate survey	To be set Y1				Increase of 2% over baseline each year until reaching 55%

Average level of agreement with connectedness questions on CA Healthy Kids Survey or similar climate survey					
Family safety & connectedness: % of families who agree or strongly agree that campus is a safe place for their child.  &  Average % of families who agree or strongly agree that school staff treat them with respect, take their concerns seriously, and are helpful to them.	To be set Y1				Increase of 2% over baseline each year until reaching 80%
Staff safety & connectedness  Avg level of agreement with staff working environment and collegiality questions on California School Climate Surveys or similar survey	To be set Y1				Increase of 2% annually until reaching 80%

## Actions

Action #	Title	Description	Total Funds	Contributing
2.a	Partnerships/Outdoor Education	Quality outdoor education experiences, service learning and community service and action relies upon community partnerships. IHD and school-site leadership will develop and sustain partnerships with Engry X and other area agencies in order to increase engagement of unduplicated pupils, so they are able to access resources, experience, and expertise related to their social-emotional development and educational/career plans. Overnight field trips and day field trips will contribute to wellness and healing efforts as they will allow students to experience open space, wilderness, a sense of belonging in outdoor	\$30,000	[Y]

		environments, and community building outside of school. Substantial evidence supports the value of outdoor education programs for promoting healthy adolescent development (Cason & Gillis, 1994; Dillon et al., 2006; Hattie, Marsh, Neill, & Richards, 1997; Norton & Watt, 2013).		
2.b.	Family Engagement	Leverage new parent engagement strategies through in-person and virtual sessions to expand family involvement in decision-making and increase participation and sense of connection with families of low-income students and English learners.	\$80,676 + Additional costs included in 2.a.	[Y]
2.c.	After-school programming	We will begin the initial phase of an after-school program to supplement the educational program and increase student engagement and sense of connectedness.	\$20,000	[Y]
2.d.	Mentorship programming	Working with community agencies that specialize in mentorship of urban students, we will give students opportunities to grow in their empowerment and express their voices with compassion to improve the world around them. Our mentoring program will play an instrumental role in laying the foundation for character development of our IHD students.	\$40,000	[Y]
2.e.	Morning Meetings (Advisory)	At IHD, we know that meaningful relationships with adults are critical for student learning. In our morning meetings, these relationships will act as a Tier 1 support for social emotional & academic needs. These meetings will provide a structure for ongoing healing, creating intentional miniature communities where every student belongs, can feel like a blessing and can engage in healing. Our teachers' comfort/expertise with developing small learning communities and social emotional learning will vary, so over the next three years we will identify resources and tools for this responsive, restorative approach and develop the capacity of teachers to provide an intentional SEL program that fulfills this vision. We will intentionally develop advisory to be a Tier 1 social emotional support as we develop the social-emotional side of our multi-tiered systems of support (MTSS). Tools and strategies from advisory can be incorporated in classes across content areas. Practicing building community in our morning meetings will also increase teachers' capacity to implement Universal Design for Learning in academic settings.	Costs captured 1.b.	[Y]
2.f.	Faculty/Staffing	Attendance Secretary and Student Services Coordinator will be leading efforts to closely connect students' families and home communities to the work of GC.	Costs captured in 1.c. and 2.b.	[Y]

# Goal

<b>Goal #3</b>	<b>Environmental Student Outcomes: crafting a focused, intentional instructional program targeted to grow skills of environmental literacy, dispositions and stewardship.</b>
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An explanation of why the LEA has developed this goal.

At IHD, we strive to help our students become environmentally literate people with the capacity to act individually and with others to support ecologically sound, economically prosperous, and equitable communities for present and future generations. Through lived experiences and education programs that include classroom-based lessons, experiential education, and outdoor learning, students will become environmentally literate, developing the knowledge, skills, and understanding of environmental principles to analyze environmental issues and make informed decisions.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
<p>Course Access &amp; materials to help students grow and develop Environmental Literacy Knowledge &amp; Skills</p> <p>(Content Knowledge, Systems Knowledge, Critical Thinking, &amp; Planning)</p> <p>Students will demonstrate an understanding of systems thinking about the Environmental Principles &amp; Concepts in the context of grade level content and projects.</p> <p>Students will demonstrate critical thinking to analyze environmental issues and plan to take informed action.</p>	To be set Y1				100% of students have access to CCSS and NGSS Standards-aligned curriculum and to the educational program as outlined in the charter petition.
<p>Environmental Dispositions</p> <p>(Social Emotional Learning &amp;</p>	To be set Y1				Students will score higher than norm group in SEL dispositions of efficacy and empathy on CHKS

<p>Connectedness with Nature)</p> <p>Students will demonstrate connectedness with nature.</p> <p>Students will demonstrate social-emotional learning competencies related to the environment.</p>					
<p>Environmental Stewardship Behaviors (Individual &amp; Collective)</p> <p>Students will demonstrate individual stewardship behavior.</p> <p>Students will demonstrate civically engaged stewardship behavior.</p>	To be set Y1				100% of students will receive opportunity to complete for 1 community service project in an academic year
<p>School Facilities in “Good Repair”: Clean, safe, and functional as determined by the Green Ribbon Pillar 1 and 2 criteria or other local instrument that meets same criteria</p>	To be set in Y1				The facility will receive ratings of good on all inspected systems and an overall rating of good.

## Actions

Action #	Title	Description	Total Funds	Contributing
3.a.	High-quality, standards-aligned curriculum and instructional materials	At IHD, all of our students will have access to courses and materials to help them grow and develop Environmental Literacy Knowledge & Skills, Environmental Dispositions and Environmental Stewardship behaviors.	Costs are covered in 1.e.	[Y]
3.b.	Outdoor Education/Experiential Learning/Place-Based Learning	Ultimately, environmentally literate individuals possess a sophisticated set of knowledge, skills, and dispositions that allow them to solve novel environmental problems and determine the best set of actions; they are engaged in civic decision-making and action. Therefore, IHD will use a variety of environmental education resources, including those offered in field-based experiences with local agencies such as the National Park Service, Fish and Wildlife Service, Bureau of Land Management, State Parks Service, local land trusts, fisheries, and other entities that manage natural resources. IHD educators will be able to	\$90,000	[Y]

		extend these field-based learning experiences by developing learning modules using the Environmental Principles & Contexts and the Guidelines for Learning (K-12).		
3.c.	Environmental Education Professional Learning	The administrative team at IHD will set determined outcomes to backwards plan and move strategically from outcomes to teacher practices. This helps delineate priorities for our precious commodity of professional learning time.	Costs captured 1.b.	[Y]
3.d.	Sustainable facilities & operations	Children need to have a clearer understanding of the natural world and the impacts of human choices as they will one day be looked to for decisions concerning natural resources, informed policymaking, and legalities (Milner et al., 2012). Nurturing this level of understanding means "our schools must be models of sustainable and inclusive practices, and our education programs must be action and solution-oriented," according to the California Environmental Literacy Initiative (2019, p. 2).	\$ 266,500	[N]

## Goal Analysis [2024-25]

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.

Analysis of the 2024-25 goals will occur during the 2025-26 update cycle.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures.

Analysis of the 2024-25 goals will occur during the 2025-26 update cycle.

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

Analysis of the 2024-25 goals will occur during the 2025-26 update cycle.

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.

Analysis of the 2024-25 goals will occur during the 2025-26 update cycle.

**A report of the Estimated Actual Expenditures for last year's actions may be found in the Annual Update Expenditures Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

Percentage to Increase or Improve Services	Increased Apportionment based on the Enrollment of Foster Youth, English Learners, and Low-Income students
34.72%	\$622,529

The Budgeted Expenditures for Actions identified as Contributing may be found in the Increased or Improved Services Expenditures 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.

### Goal 1: Improved Student Achievement

Given that JUSD as a district has an overall ELA proficiency rate of 29.1%, math scores that average out to about 25%, we have a vision and strategy to embrace the community, the natural world and the charter school campus as fundamental places of learning and relevance. We view curriculum and learning from a foundation that seeks to break down barriers and positions all students for growth. The educational pathway of our students immerses them in experiences of awe, wonder, and curiosity through environmental engagement. The academic program at IHD will prepare every student for the intensity and challenge of high school academics. The courses offered at the IHD will be grounded in rigor and high engagement. IHD's teaching staff will create learning environments that actively engage the student body. Our goal is that all students leave the program with an intellectual curiosity for all academic disciplines and the academic preparation to be successful in high school, college, and the competitive world beyond.

In order to address this condition of our low-income students and English learners, we will ensure that our staff is highly qualified and trained (Action 1.a.) for the opportunities and challenges working with these populations can offer. IHD will improve instruction via our teacher development system (Action 1.b), our Literacy, Science & Math Initiatives (Action 1.e), increase effectiveness and sustainability of interventions by improving our Multi-Tiered systems of support (Action 1.c), and develop an integrated and innovative program of Universal Design for Learning supports in the targeted work of our student services coordinator (Action 1.d.). These actions meet needs most associated with these students so we expect that course passage, as well as other academic measures for our low-income students and English learners will increase significantly.

### Goal 2: School Culture/Climate

IHD intends to serve students who have struggled academically and have been historically underserved and socioeconomically disadvantaged. Students struggling with chronic absenteeism, behavioral issues that lead to suspension/expulsion, students with disabilities, and foster youth would benefit especially from an instructional approach that combines informed best practices with individualized attention through a schoolwide mentoring program. IHD will implement a thoughtful and innovative approach to meeting the academic and ancillary

needs of many of these students, primarily in the social-emotional area, will result in not only increased levels of academic achievement but healthier and happy children who are better prepared as individuals to be a part of a healthier society. IHD faculty and staff are determined to create a learning and growing environment that will help students develop into poised, confident, and articulate leaders who will use their education and life experiences to create positive change in their own lives, in their communities, and in the world. In order to address this condition of our low-income students and English learners, we will provide outdoor education and service learning opportunities to our students (Action 2.a), utilize an integrated, proactive strategy to engage families throughout many aspects of the school (Action 2.b., Action 2.f.), reimagine advisory to improve student health, connection to community and increase MTSS social emotional support (Action 2.e.). We will also provide a robust afterschool program to increase student engagement and sense of connectedness (Action 2.c). Our utilization of mentors for both social-emotional and academic supports will also boost engagement with school (Action 2.d.). With these actions being provided, we expect/hope that any IHD student who struggles with attendance and engagement will benefit. However, because of the significantly higher chronic absenteeism rates of low-income students and English learners in our neighborhood schools and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status and the needs most associated with the stresses of being an English learner, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate in area schools.

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

Through the implementation of these actions and services made possible by the supplemental and concentration funds received and assigned to them, our unduplicated student groups will be given increased support and improved services in order to ensure their academic growth and success. Services will be improved as we implement our refinement cycle:



- collecting, disaggregating and visualizing data to monitor equity
- sharing data and collaborating with stakeholders, including teachers, staff, families and colleagues from other ECS schools
- synthesizing and prioritizing
- implementing refinements and monitoring implementation metrics
- reflecting on the effectiveness of our actions and repeating the cycle

This cycle will be enacted as we launch our new, aligned and innovative educational model, implement our teacher development system, launch our MTSS, provide targeted professional development for ELD and Special Education, and implement literacy, science and math initiatives. Feedback from families, staff and students will be part of every LCAP action to help us adjust our plans to best meet the needs of our students. Services will be increased through the creation of new positions, including adding a full-time student services coordinator, an attendance secretary, dedicated classroom teaching assistants, literacy mentors and social-emotional mentors and counselors.

## Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$ 1,643,553	\$ 123,025	\$ -	\$ 68,412	1,834,990	\$ 1,224,490	\$ 610,500

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.a.	IHD Highly Qualified Faculty/Staff	All	\$ 802,271	\$ -	\$ -	\$ -	\$ 802,271
1	1.b.	Teacher Development System for IHD Bes	All	\$ 7,500	\$ -	\$ -	\$ 7,500	\$ 15,000
1	1.c.	Multi-Tiered Systems of Support	All	\$ 55,920	\$ -	\$ -	\$ -	\$ 55,920
1	1.d.	Special Education Program	All	\$ 264,711	\$ -	\$ -	\$ 60,912	\$ 325,623
1	1.e.	Science, Literacy & Math Initiatives	All	\$ 68,595	\$ 40,405	\$ -	\$ -	\$ 109,000
2	2.a.	Partnerships/Outdoor Education	All	\$ 30,000	\$ -	\$ -	\$ -	\$ 30,000
2	2.b.	Family Engagement	All	\$ 80,676	\$ -	\$ -	\$ -	\$ 80,676
2	2.c.	After-school Programming	All	\$ 20,000	\$ -	\$ -	\$ -	\$ 20,000
2	2.d.	Mentorship programming	All	\$ 40,000	\$ -	\$ -	\$ -	\$ 40,000
2	2.e.	Morning Meetings (Advisory)	All	\$ -	\$ -	\$ -	\$ -	\$ -
2	2.f.	Faculty/Staffing	All	\$ -	\$ -	\$ -	\$ -	\$ -
3	3.a.	High-quality, standards-aligned curriculum	All	\$ -	\$ -	\$ -	\$ -	\$ -
3	3.b.	Outdoor Education/Experiential Learning/Pl	All	\$ 90,000	\$ -	\$ -	\$ -	\$ 90,000
3	3.c.	Environmental Education	All	\$ -	\$ -	\$ -	\$ -	\$ -
3	3.d.	Sustainable facilities & operations	All	\$ 183,880	\$ 82,620	\$ -	\$ -	\$ 266,500

## Contributing Expenditure Table

Totals by Type	Total LCFF Funds	Total Funds
<b>Total:</b>	\$ 1,459,673	\$ 1,568,490
<b>LEA-wide Total:</b>	\$ -	\$ -
<b>Limited Total:</b>	\$ -	\$ -
<b>Schoolwide Total:</b>	\$ 1,459,673	\$ 1,568,490

Goal #	Action #	Action Title	Scope	Unduplicated Student Group(s)	Location	LCFF Funds	Total Funds
1	1.a.	IHD Highly Qualified Faculty/Staff	Schoolwide	All	Elementary	\$ 802,271	\$ 802,271
1	1.b.	Teacher Development System for IHD Bes	Schoolwide	All	Elementary	\$ 7,500	\$ 15,000
1	1.c.	Multi-Tiered Systems of Support	Schoolwide	All	Elementary	\$ 55,920	\$ 55,920
1	1.d.	Special Education Program	Schoolwide	All	Elementary	\$ 264,711	\$ 325,623
1	1.e.	Science, Literacy & Math Initiatives	Schoolwide	All	Elementary	\$ 68,595	\$ 109,000
2	2.a.	Partnerships/Outdoor Education	Schoolwide	All	Elementary	\$ 30,000	\$ 30,000
2	2.b.	Family Engagement	Schoolwide	All	Elementary	\$ 80,676	\$ 80,676
2	2.c.	After-school Programming	Schoolwide	All	Elementary	\$ 20,000	\$ 20,000
2	2.d.	Mentorship programming	Schoolwide	All	Elementary	\$ 40,000	\$ 40,000
2	2.e.	Morning Meetings (Advisory)	Schoolwide	All	Elementary	\$ -	\$ -
2	2.f.	Faculty/Staffing	Schoolwide	All	Elementary	\$ -	\$ -
3	3.a.	High-quality, standards-aligned curriculum	Schoolwide	All	Elementary	\$ -	\$ -
3	3.b.	Outdoor Education/Experiential Learning/P	Schoolwide	All	Elementary	\$ 90,000	\$ 90,000
3	3.c.	Environmental Education	Schoolwide	All	Elementary	\$ -	\$ -

# Instructions

[Plan Summary](#)

[Stakeholder Engagement](#)

[Goals and Actions](#)

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

For additional questions or technical assistance related to the completion of the 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 LEAs to engage their local stakeholders in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have ten state priorities). LEAs document the results of this planning process in the Local Control and Accountability Plan (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] 52064(e)(1)). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. Local educational agencies (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 Stakeholder Engagement:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful stakeholder engagement (EC 52064(e)(1)). Local stakeholders 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 52064(b)(4-6)).

- o Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC 52064(b)(1) & (2)).
- o Annually reviewing and updating the LCAP to reflect progress toward the goals (EC 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 stakeholders 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 stakeholder engagement tool.

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 stakeholders and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing, but also allow stakeholders 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 stakeholders 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 stakeholder engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard, how is the LEA using its budgetary resources to respond to 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 or a set of actions that the LEA believes, based on input gathered from stakeholders, research, and experience, will have the biggest impact on behalf of its 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 students and community. 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, stakeholder input, 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? 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.

## Stakeholder Engagement

### Purpose

Significant and purposeful engagement of parents, students, educators, and other stakeholders, 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 stakeholder engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC 52064(e)(1)*). Stakeholder engagement is an ongoing, annual process.

This section is designed to reflect how stakeholder engagement influenced the decisions reflected in the adopted LCAP. The goal is to allow stakeholders that participated in the LCAP development process and the broader public understand how the LEA engaged stakeholders 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 stakeholder groups that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP. Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective stakeholder 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 stakeholder engagement 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 stakeholder process and how the stakeholder engagement was considered before finalizing the LCAP.”

Describe the stakeholder engagement process used by the LEA to involve stakeholders in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required stakeholder groups 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 stakeholders. A response may also include information about an LEA’s philosophical approach to stakeholder engagement.

**Prompt 2:** “A summary of the feedback provided by specific stakeholder groups.”

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

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

A sufficient response to this prompt will provide stakeholders and the public clear, specific information about how the stakeholder 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 stakeholder feedback described in response to Prompt 2. This may include a description of how the LEA prioritized stakeholder requests 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 stakeholder 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 stakeholders 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 stakeholders 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 stakeholders. 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 stakeholders, 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.

### ***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 2020–2021 outcomes on some

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

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

Complete the table as follows:

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

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

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023-24)
Enter information in this box when completing the LCAP for <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> .

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 expenditure 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 expenditure 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. Minor variances in expenditures 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 stakeholders. 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 stakeholders with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improved services for its unduplicated students as compared to all students 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 stakeholders 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**

This section must be completed for each LCAP year.

When developing the LCAP in year 2 or year 3, copy the “Increased or Improved Services” section and enter the appropriate LCAP year. Using the copy of the section, complete the section as required for the relevant LCAP year. Retain all prior year sections for each of the three years within the LCAP.

**Percentage to Increase or Improve Services:** Identify the 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).

**Increased Apportionment based on the enrollment of Foster Youth, English Learners, and Low-Income Students:** Specify the estimate of the amount of funds apportioned on the basis of the number and concentration of unduplicated pupils for the LCAP year.

**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.**

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% 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% 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% 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%, 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.

## **EXHIBIT 2**

Supplemental Information



**From:** [Daniel R. Brooks](#)  
**To:** [Sara Ayers](#)  
**Cc:** [Jesse Basel](#); [Jordan Campbell](#)  
**Bcc:**  
**Subject:** Questions About the Charter Proposal  
**Date:** Wednesday, November 08, 2023 8:15:00 AM  
**Attachments:** [image001.png](#)  
[image003.png](#)

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Good morning,

We are looking forward to meeting with your team on November 15, at 11:00. That meeting will be held at our District office.

Because that meeting will be late in the charter review process, we would like to ask some questions now. Please provide your responses in writing and send to me by email or otherwise direct them to my attention, if possible, by this Friday, November 10, 2023. We will have several other questions for you at the meeting. Thank you!

Initial questions:

1. The charter document indicates that The Institute of Human Development (IHD) is a nonprofit public benefit corporation registered in the state of California. Please provide evidence of incorporation, including Articles of Incorporation and Bylaws.
2. Please provide the names and relevant qualifications of all persons proposed to serve on the governing body of the charter school.
3. The charter document indicates that the IHD Board “has adopted a Conflict of Interest Code that complies with the Political Reform Act, Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1, and Corporations Code conflict of interest rules...” Please provide a copy of that Conflict of Interest Code.
4. Page 9 of the Charter indicates Jordan Campbell “helped start several charter schools.” Which charter schools did Mr. Campbell help start, and what was his role with respect to those schools?
5. Please clarify Mr. Campbell’s position (for example, CEO and/or founder) with respect to the following companies: Winner Circle Athletics LLC, Winner Circle - Nutrition LLC, Winner Circle – Tutoring LLC, and Rapid Recovery Lounge LLC (all of which have the same address, 255 N. Lincoln Ave. in Corona, CA.). If the charter petition is granted, what will be the relationship between the charter school and each of these entities, if any?
6. The charter document mentions a partnership between Mr. Campbell and the CEO of EnergyX. If the charter is granted, what will be the relationship between the charter school and EnergyX, if any?

7. If the proposed charter school has an organizational chart, please provide a copy.
8. Please provide a description of the facilities to be used by the charter school, including a specific address where the charter school intends to locate.
9. Please provide documentation showing that the petition circulated and signed by 100+ parents (1) was attached to the proposed charter document when circulated for signatures; and (2) included a prominent statement that, "A signature on the petition means that the parent or legal guardian is meaningfully interested in having their child or ward attend the charter school."
10. What percentage of signatures on the petition do you estimate are from parents of students currently enrolled at Winner Circle Athletics?



Daniel Brooks, Assistant Superintendent of Education Services

T 951.360.4164

[daniel\\_brooks@jUSD.k12.ca.us](mailto:daniel_brooks@jUSD.k12.ca.us)

**LEARNING WITHOUT LIMITS**

**From:** [Sara Ayers](#)  
**To:** [Daniel R. Brooks](#); [Jordan Campbell](#); [Ed Luna](#); [paul.macgregor@live.com](mailto:paul.macgregor@live.com); [Teague Egan](#); [Daniel Shinoff](#); [Cindy Vasquez](#); [Courtney Sparling](#)  
**Subject:** Fwd: Questions About the Charter Proposal  
**Date:** Tuesday, November 14, 2023 1:45:32 PM  
**Attachments:** [Bylaws of Institute of Human Development Charter School \(1\).pdf](#)  
[MOU EnergyX.pdf](#)  
[Institute of Human Development Conflict of Interest Policy.pdf](#)  
[Founding Group.pdf](#)  
[ARTICLES OF INCORP 2023.pdf](#)  
[CA SOS RE INITIAL FILING APPROVED.pdf](#)  
[SOS INFO LETTER TO FILE STMT OF INFO.pdf](#)

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Good Afternoon,

We are looking forward to our meeting tomorrow @ 11:00am, I was wondering if we could also set-up a zoom meeting for the few members that will not be in town?

Please see the answers to your questions below:

1. The charter document indicates that The Institute of Human Development (IHD) is a nonprofit public benefit corporation registered in the state of California. Please provide evidence of incorporation, including Articles of Incorporation and Bylaws. - **Please see the articles and bylaws attached.**
2. Please provide the names and relevant qualifications of all persons proposed to serve on the governing body of the charter school. **Please see the attached Founding Group PDF**
3. The charter document indicates that the IHD Board “has adopted a Conflict of Interest Code that complies with the Political Reform Act, Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1, and Corporations Code conflict of interest rules...” Please provide a copy of that Conflict of Interest Code. - **Please see the Conflict of Interest Code attached**
4. Page 9 of the Charter indicates Jordan Campbell “helped start several charter schools.” Which charter schools did Mr. Campbell help start, and what was his role with respect to those schools? **Please see MOU's that will be provided during meeting tomorrow morning.**
5. Please clarify Mr. Campbell’s position (for example, CEO and/or founder) with respect to the following companies: Winner Circle Athletics LLC, Winner Circle - Nutrition LLC, Winner Circle – Tutoring LLC, and Rapid Recovery Lounge LLC (all of which have the same address, 255 N. Lincoln Ave. in Corona, CA.). If the charter petition is granted, what will be the relationship between the charter school and each of these entities, if any? **Each of these entities will not be a part of IHD.**

6. The charter document mentions a partnership between Mr. Campbell and the CEO of EnergyX. If the charter is granted, what will be the relationship between the charter school and EnergyX, if any? **Please MOU attached**
7. If the proposed charter school has an organizational chart, please provide a copy. Print out will be handed at Meeting tomorrow.
8. Please provide a description of the facilities to be used by the charter school, including a specific address where the charter school intends to locate. **The IHD charter will be located in the city of Jurupa. At this time without final approval a location has yet to be confirmed, however we are in conversation with Daniel McCoppin with Rodeo Realty.**
9. Please provide documentation showing that the petition circulated and signed by 100+ parents (1) was attached to the proposed charter document when circulated for signatures; and (2) included a prominent statement that, "A signature on the petition means that the parent or legal guardian is meaningfully interested in having their child or ward attend the charter school." **When the signatures were collected the charter petition was shared along with a cover sheet with the following statement.**

 [IHD signatures.pdf](#)

10. What percentage of signatures on the petition do you estimate are from parents of students currently enrolled at Winner Circle Athletics? **The petition was 100% signatures from parents of Winner Circle Athletics athletes that are excited for their students' opportunity to learn within this environment. Please note that currently WCA athletes are within many different charter schools as WCA is just a vendor for them and will continue to be just that. IHD will not replace WCA as they are two completely different entities.**

Thank you & please let me know if you have any other question,

Sara .

Winner Circle Athletics  
Athletic Performance and Wellness Center  
951-432-7196  
[winnercircleathletics.com](http://winnercircleathletics.com)  
[contact.thecircle.wca@gmail.com](mailto:contact.thecircle.wca@gmail.com)  
255 N Lincoln Ave  
Corona CA 92882

Response I

# Bylaws of Institute of Human Development Charter School

(A California Nonprofit Public Benefit Corporation)

## ARTICLE I

### NAME

Section 1. NAME. The name of this corporation is Institute of Human Development Charter School.

## ARTICLE II

### PRINCIPAL OFFICE OF THE CORPORATION

Section 1. PRINCIPAL OFFICE OF THE CORPORATION. The principal office for the transaction of the activities and affairs of this corporation is located at **TBD**, Jurupa, California, Pending approval. The board of directors may change the location of the principal office. Any such change of location must be noted by the secretary on these bylaws opposite this Section; alternatively, this Section may be amended to state the new location.

Section 2. OTHER OFFICES OF THE CORPORATION. The board of directors may any time establish branch or subordinate offices at any place or places where this corporation is qualified to conduct its activities.

## ARTICLE III

### GENERAL AND SPECIFIC PURPOSES; LIMITATIONS

Section 1. GENERAL AND SPECIFIC PURPOSES. The purpose of this corporation is to manage, operate, guide, direct and promote the Institute of Human Development Charter School ("IHD") (a California public charter school). Also, in the context of these purposes, the Corporation shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Corporation.

The Corporation shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any further federal tax code; or (b) a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code. No substantial part of the activities of the corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

## ARTICLE IV

### CONSTRUCTION AND DEFINITIONS

Section 1. CONSTRUCTION AND DEFINITIONS. Unless the context indicates otherwise, the general provisions, rules of construction, and definitions in the California Nonprofit Corporation Law shall govern the construction of these bylaws. Without limiting the generality of the preceding sentence, the masculine gender includes the feminine and neuter, the singular includes the plural, and the plural includes the singular, and the term "person" includes both a legal entity and a natural person.

## ARTICLE V

### DEDICATION OF ASSETS

Section 1. DEDICATION OF ASSETS. This corporation's assets are irrevocably dedicated to public benefit purposes as set forth in the Charter School's Charter. No part of the net earnings, properties, or assets of the corporation, on dissolution or otherwise, shall inure to the benefit of any private person or individual, or to any director or officer of the corporation. On liquidation or dissolution, all properties and assets remaining after payment, or provision for payment, of all debts and liabilities of the corporation shall be distributed to a nonprofit fund, foundation, or association which is organized and operated exclusively for educational, public, or charitable purposes and that has established its exempt status under Internal Revenue code section 501(c)(3), or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

## ARTICLE VI

### CORPORATIONS WITHOUT MEMBERS

Section 1. CORPORATIONS WITHOUT MEMBERS. This corporation shall have no voting members within the meaning of the Nonprofit Corporation Law. The corporation's board of directors may, in its discretion, admit individuals to one or more classes of nonvoting members; the class or classes shall have such rights and obligations as the board of directors finds appropriate.

## ARTICLE VII

### BOARD OF DIRECTORS

Section 1. GENERAL POWERS. Subject to the provisions and limitations of the California Nonprofit Benefit Corporation Law and any other applicable laws, and subject to any limitations of the articles in incorporation or bylaws, the corporation's activities and affairs shall be managed, and all corporate powers shall be exercised, by or under the direction of the board of directors ("board").

Section 2. SPECIFIC POWERS. Without prejudice to the general powers set forth in Section 1 of these bylaws, but subject to the same limitations, the board of directors shall have the power to do the following:

1. Appoint and remove, at the pleasure of the board of directors, all corporate officers, agents, and employees; prescribe powers and duties for them as are consistent with the law, the articles of incorporation, and these bylaws; fix their compensation; and require from them security for faithful service.
2. Change the principal office or the principal business office in California from one location to another; cause the corporation to be qualified to conduct its activities in any state, territory, dependency, or country; conduct its activities in or outside California; and designate a place in Sutter County, California for holding any meeting of members.
3. Borrow money and incur indebtedness on the corporation's behalf and cause to be executed and delivered for the corporation's purposes, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations, and other evidences of debt and securities.
4. Adopt and use a corporate seal;



Section 3. DESIGNATED DIRECTORS AND TERMS. All directors shall be designated by the existing directors. The board of directors shall consist of at least five (5), but no more than seven (7) directors unless changed by amendment to these bylaws. Further, the board of directors shall consist of at least one (1) but no more than two (2) Parent Representatives and at least three (3) Community Representatives. Parent Representatives must be the parent or legal guardian of a child enrolled at Institute of Human Development Charter School at the time of the Parent Representative's appointment. Parents, or legal guardians of a child enrolled at Institute of Human Development Charter School are eligible to serve as a Community Representative one (1) year after they no longer have a child enrolled at Institute of Human Development Charter School. Additionally, pursuant to Education Code Section 47604(c), the governing board of the Jurupa Unified School District, the granting authority, has the right to appoint one representative to the Board. In the event that a representative of the governing board of the granting authority is appointed to the Board, the Board may appoint an additional director to ensure an odd number of directors. The length of the directors' terms shall be determined in accordance with section 5 of this Article.

Section 4. RESTRICTION ON INTERESTED PERSONS AS DIRECTORS. No more than 49 percent of the persons serving on the board of directors may be "interested persons". An interested person is (a) any person compensated by the corporation for services rendered to it within the previous 12 months, whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a director as director, and (b) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law of such person. The board may adopt other policies circumscribing potential conflicts of interest.

Section 5. DIRECTORS' TERMS. Except as otherwise provided in these Bylaws, each Parent Representative and the representative appointed by the Jurupa Unified School District (granting agency), if any, shall hold office for two (2) years and until a successor director has been designated and qualified; each Community Representative shall hold office for three (3) years and until a successor director has been designated and qualified. The board may appoint the same board members at the expiration of any term as provided in section 12.

Section 6. NOMINATIONS BY COMMITTEE. The chairman of the board of directors or, if none, the president will appoint a committee to designate qualified candidates for election to the board of directors at least thirty (30) days before the date of any election of directors. The nominating committee shall make its report at least seven (7) days before the date of the election, or at such other time as the board of directors may set, and the secretary shall forward to each board member, with the notice of meeting required by these bylaws, a list of all candidates nominated by committee.

Section 7. EVENTS CAUSING VACANCIES ON BOARD. A vacancy or vacancies on the board of directors shall occur in the event of (a) the death, removal, or resignation of any director; (b) the declaration by resolution of the board of directors of a vacancy in the office of a director who has been convicted of a felony, declared of unsound mind by a court order, or found by final order or judgment of any court to have breached a duty under California Nonprofit Public Benefit Corporation Law, Chapter 2, Article 3; (c) the increase of the authorized number of directors; or (d) the failure of the members, at any meeting of members at which any director or directors are to be elected, to elect the number of directors required to be elected at such meeting.

Section 8. RESIGNATION OF DIRECTORS. Except as provided below, any director may resign by giving written notice to the chairman of the board, if any, or to the president or the secretary of the board. The resignation shall be effective when the notice is given unless the notice specifies a later time for the resignation to become effective. If a director's resignation is effective at a later time, the board of directors may elect a successor to take office as of the date when the resignation becomes effective.

Section 9. DIRECTOR MAY NOT RESIGN IF NO DIRECTOR REMAINS. Except on notice to the California Attorney General, no director may resign if the corporation would be left without a duly elected director or directors.

Section 10. REMOVAL OF DIRECTORS. Any director, except for the representative appointed by the charter authorizer, may be removed, with or without cause, by the vote of the majority of the members of the entire board of directors at a special meeting called for that purpose, or at a regular meeting, provided that notice of that meeting and of the removal questions are given in compliance with the provisions of the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Division 2 of Title 5 of the Government Code) as said chapter may be modified by subsequent legislation ("Brown Act"). The representative designated by the charter authorizer may be removed without cause by the charter authorizer or with the written consent of the charter authorizer. Any vacancy caused by the removal of a director shall be filled as provided in Section 12.

Section 11. VACANCIES FILLED BY BOARD. Vacancies on the board of directors, except for the representative appointed by the charter authorizer, may be filled by approval of the board of directors or, if the number of directors then in office is less than a quorum, by (1) the unanimous written consent of the directors then in office, (2) the affirmative vote of a majority of the directors then in office at a meeting held according to notice or waivers of notice complying with Corporations Code Section 5211, or (3) a sole remaining director. A vacancy in the seat of the representative of the charter authorizer shall be filled by the charter authorizer.

Section 12. NO VACANCY ON REDUCTION OF NUMBER OF DIRECTORS. Any reduction of the authorized number of directors shall not result in any director being removed before his or her term of office expires.

Section 13. PLACE OF BOARD OF DIRECTORS MEETINGS. Meetings shall be held at the principal office of the corporation. The board of directors may designate that a meeting be held at any place within the physical boundaries of Sutter County, California. All meetings of the board of directors shall be called, held, and conducted in accordance with the terms and provisions of the Brown Act.

Section 14. MEETINGS BY TELEPHONE OR OTHER TELECOMMUNICATIONS EQUIPMENT. Any board of directors meeting may be held by conference telephone, video screen communication, or other communications equipment. Participation in a meeting under this Section shall constitute presence in person at the meeting if all of the following apply:

(a) At a minimum, a quorum of the members of the board of directors shall participate in the teleconference meeting from locations within the physical boundaries of Sutter County;

(b) All votes taken during a teleconference meeting shall be by roll call;

(c) If the board of directors elects to use teleconferencing, it shall post agendas at all teleconference locations with each teleconference location being identified in the notice and agenda of the meeting;

(d) All locations where a member of the board of directors participates in a meeting via teleconference must be fully accessible to members of the public and shall be listed on the agenda;

(e) Members of the public must be able to hear what is said during the meeting and shall be provided with an opportunity to address the board of directors directly at each teleconference location; and

(f) Members of the public attending a meeting conducted via teleconference need not give their name when entering the conference call.

Section 15. ANNUAL AND REGULAR MEETINGS. Regular meetings of the board of directors shall be held at such times and places as may from time to time be fixed by the board of directors. At least 72 hours before a regular meeting, the board of directors, or its designee shall post an agenda containing a brief general description of each item of business to be transacted or discussed at the meeting. The board of directors shall hold an annual meeting for purposes of organization, election of officers, and transaction of other business. This meeting shall be held at a time, date, and place as noticed by the board of directors in accordance with the Brown Act. The board may hold regular, special and emergency meetings. All meetings of the board of directors shall be called, held and conducted in accordance with the terms and provisions of the Brown Act.

Section 16. AUTHORITY TO CALL SPECIAL MEETINGS. Special meetings of the board of directors for any purpose may be called at any time by the chairman of the board or a majority of the directors. If a chairman of the board has not been elected then the president is authorized

to call a special meeting in place of the chairman of the board. The party calling the special meeting shall determine the place, date, and time thereof.

Section 17. NOTICE OF SPECIAL OR EMERGENCY MEETINGS. In accordance with the Brown Act, special meetings of the board of directors may be held only after twenty-four (24) hours notice is given to the public through the posting of an agenda. An emergency meeting of the board of directors may be held only after one (1) hour notice is given to the public through the posting of an agenda.

Notice of the time and place of special or emergency meetings shall also be given to each director by (a) personal delivery of written notice; (b) first-class mail, postage prepaid; (c) telephone, including a voice messaging system or other system or technology designed to record and communicate messages, either directly to the director or to a person at the director's office who would reasonably be expected to communicate that notice promptly to the director; (d) telegram; (e) facsimile; (f) electronic mail; or (g) other electric means. All such notices shall be given or sent to the director's address or telephone number as shown on the corporation's records and shall be sent with at least such notice as is required in accordance with the terms and provisions of the Brown Act which are applicable to the type of meeting called.

Notice of the time and place of special or emergency meetings shall be given to all media who have provided written notice to the Institute of Human Development Charter School.

The notice shall state the time of the meeting and the place, if the place is other than the corporation's principal office and the business to be transacted at the meeting.

All notice requirements will comply with the terms and provisions of the Brown Act.

Section 18. QUORUM. A majority of the directors then in office shall constitute a quorum for the transaction of any business. Every action taken or decision made by a majority of the directors present at a duly held meeting at which a quorum is present shall be an act of the board so long as the majority of the quorum does not consist of Parent Representatives. A meeting at which a quorum is initially present may continue to transact business, despite the withdrawal of some directors from that meeting, if any action taken or decision made is approved by at least a majority of the required quorum for that meeting.

Section 19. ADJOURNMENT. A majority of the directors present, whether or not a quorum is present, may adjourn any meetings to another time and place. Notice of such adjournment to another time or place shall be given, prior to the time scheduled for the continuation of the meeting, to the directors who were not present at the time of the adjournment, and to the public in the manner prescribed by the Brown Act.

Section 20. COMPENSATION AND REIMBURSEMENT. Directors may not receive such compensation, if any, for their services as directors or officers, only such reimbursement of expenses, as the board of directors may establish by resolution to be just and reasonable as to the corporation at the time that the resolution is adopted.

Section 21. CREATION OF POWERS OF COMMITTEES. The board, by resolution adopted by a majority of the directors then in office, may create one or more committees, to serve at the pleasure of the board. Committees may be structured so that they report to the Charter School Executive Director. Appointments to committees of the board of directors shall be by majority vote of the authorized number of directors. The board of directors may appoint one or more directors as alternate members of any such committee, who may replace any absent member at any meeting. Any such committee shall have all the authority of the board, to the extent provided in the board of directors' resolution, except that no committee may do the following:

- (a) Fill vacancies on the board of directors or any committee of the board;
- (b) Amend or repeal bylaws or adopt new bylaws;
- (c) Amend or repeal any resolution of the board of directors that by its express terms is not so amendable or subject to repeal;
- (d) Create any committees of the board of directors or appoint the members of committees of the board;

Section 22. MEETINGS AND ACTION OF COMMITTEES. Meetings and actions of committees of the board of directors shall be governed by, held, and taken under the provisions of these bylaws concerning meetings, other board of directors actions, and the Brown Act, if applicable, except that the time for general meetings of such committees and the calling of special meetings of such committees may be set either by board of directors resolution or, if none, by resolution of the committee. Minutes of each meeting shall be kept and shall be filled with the corporate records. The board of directors may adopt rules for the governance of any committee as long as the rules are consistent with the bylaws. If the board of directors has not adopted rules, the committee may do so.

Section 23. COMPLIANCE WITH LAWS GOVERNING STUDENT RECORDS. No director shall be personally liable for the debts, liabilities, or other obligations of this corporation.

Section 24. COMPLIANCE WITH LAWS GOVERNING STUDENT RECORDS. The Charter School and the board of directors shall comply with all applicable provisions of the Family Education rights Privacy Act ("FERPA") as set forth in Title 20 of the United States Code Section 1232g and attendant regulations as they may be amended from time to time.

Section 25. NON-LIABILITY OF DIRECTORS. No director shall be personally liable for the debts, liabilities, or other obligations of the corporation.

## ARTICLE VIII

### OFFICERS OF THE CORPORATION

Section 1. OFFICES HELD. The officers of this corporation shall be a president, a secretary,

and a chief financial officer. The corporation, at the board's direction, may also have a chairman of the board, one or more vice-presidents, one or more assistant secretaries, one or more assistant treasurers, and such other officers as may be appointed under Article VIII, Section 4, of these bylaws. The officers in addition to the corporate duties set forth in this Article VIII shall also have administrative duties as set forth in any applicable contract for employment or job specification.

Section 2. DUPLICATION OF OFFICE HOLDERS. Any number of offices may be held by the same person, except that neither the secretary nor the chief financial officer may serve concurrently as either the president or the chairman of the board.

Section 3. ELECTION OF OFFICERS. The officers of this corporation shall be chosen annually by the board of directors and shall serve at the pleasure of the board, subject to the rights of any officer under any employment contract.

Section 4. APPOINTMENT OF OTHER OFFICERS. The board of directors may appoint and authorize the chairman of the board, the president, or another officer to appoint any other officers that the corporation may require. Each appointed officer shall have the title and authority, hold office for the period, and perform the duties specified in the bylaws or established by the board.

Section 5. REMOVAL OF OFFICERS. Without prejudice to the rights of any officer under an employment contract, the board of directors may remove any officer with or without cause. An officer who was not chosen by the board of directors may be removed by any other officer on whom the board of directors confers the power of removal.

Section 6. RESIGNATION OF OFFICERS. Any officer may resign at any time by giving written notice to the board. The resignation shall take effect on the date the notice is received or at any later time specified in the notice. Unless otherwise specified in the notice, the resignation need not be accepted to be effective. Any resignation shall be without prejudice to any rights of the corporation under any contract to which the officer is a party.

Section 7. VACANCIES IN OFFICE. A vacancy in any office because of death, resignation, removal, disqualification, or any other cause shall be filled in the manner prescribed in these bylaws for normal appointment to that office, provided, however, that vacancies need to be filled on an annual basis.

Section 8. CHAIRMAN OF THE BOARD. If a chairman of the board of directors is elected, he or she shall preside at board of directors' meetings and shall exercise and perform such other powers and duties as the board of directors may assign from time to time. If there is no president, the chairman of the board of directors shall also be the chief executive officer and shall have the powers and duties of the president of the corporation set forth in these bylaws. If a chairman of the board of directors is elected, there shall also be a vice-chairman of the board of directors. In the absence of the chairman, the vice-chairman shall preside at board of directors meetings as assigned from time to time.

Section 9. PRESIDENT. Subject to such supervisory powers as the board of directors may give to the chairman of the board, if any, and subject to the control of the board, and subject to president's contract of employment, the president, also known as the Superintendent/Principal, shall be the general manager of the corporation and shall supervise, direct, and control the corporation's activities, affairs, and officers as fully described in any applicable employment contract, agreement, or job specification. The president shall have such other powers and duties as the board of directors or the bylaws may require.

Section 10. VICE-PRESIDENTS. If the president is absent or disabled, the vice-presidents, if any, in order of their rank as fixed by the board, or, if not ranked, a vice-president designated by the board, shall perform all duties of the president. When so acting, a vice-president shall have all powers of and be subject to all restrictions on the president. The vice-presidents shall have such other powers and perform such other duties as the board of directors or the bylaws may require.

Section 11. SECRETARY. The secretary shall keep or cause to be kept, at the corporation's principal office or such other places as the board of directors may direct, a book of minutes of all meetings, proceedings, and actions of the board, and of committees of the board. The minutes of meetings shall include the time and place that the meetings was held; whether the meeting was annual, regular, special, or emergency and, if special or emergency, how authorized; the notice given; and the names of persons present at board of directors and committee meetings; and the vote or abstention of each Board member present for the action taken. The secretary shall keep or cause to be kept, at the principal California office, a copy of the articles of incorporation and bylaws as amended to date.

The secretary shall give, or cause to be given, notice of all meetings of members, of the board, and of committees of the board of directors that these bylaws require to be given. The secretary shall keep the corporate seal, if any, in safe custody and shall have such other powers and perform such other duties as the board of directors or by bylaws may require.

Section 12. CHIEF FINANCIAL OFFICER. The chief financial officer shall keep and maintain, or cause to be kept and maintained, adequate and correct books and accounts of the corporation's properties and transactions. The chief financial officer shall send or cause to be given to the members and directors such financial statements and reports are required to be given by law, by these bylaws, or by the board. The books of account shall be open to inspection by any director at all reasonable times.

The chief financial officer shall (i) deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the corporation with such depositories as the board of director may designate; (ii) disburse the corporation's funds as the board of directors may order; (iii) render to the president, chairman of the board, if any, and the board, when requested, an account of all transactions as chief financial officer and of the financial condition of the corporation; and (iv) have such other powers and perform such other duties as the board, contract, job specification, or the bylaws may require.

If required by the board, the chief financial officer shall give the corporation a bond in the amount and with the surety or sureties specified by the board of directors for faithful performance of the duties of the office and for restoration to the corporation of all of its books, papers, vouchers, money, and other property of every kind in the possession or under the control of the chief financial officer on his or her death, resignation,, retirement, or removal from office.

## ARTICLE IX

### CONTRACTS WITH NON-DIRECTOR DESIGNATED EMPLOYEES

Section 1. CONTRACTS WITH NON-DIRECTOR DESIGNATED EMPLOYEES. The Corporation shall not enter into a contract or transaction in which a non-director designated employee (e.g., officers and other key decision-making employees) directly or indirectly has a material financial interest unless all of the requirements in the Corporation's Conflict of Interest Code have been fulfilled.

## ARTICLE X

### LOANS TO DIRECTORS AND OFFICERS

Section 1. LOANS TO DIRECTORS AND OFFICERS. The Corporation shall not lend any money or property to or guarantee the obligation of any director or officer; provided, however, that the Corporation may advance money to a director or officer of the Corporation for expenses reasonably anticipated to be incurred in the performance of his or her duties if that director or officer would be entitled to reimbursement for such expenses of the Corporation.

## ARTICLE XI

### INDEMNIFICATION

Section 1. INDEMNIFICATION. To the fullest extent permitted by law, the Corporation shall indemnify its directors, officers, employees, and other persons described in Corporations Code Section 5238(a), including persons formerly occupying any such positions, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in that section, and including an action by or in the right of the Corporation by reason of the fact that the person is or was a person described in that section. "Expenses," as used in this bylaw, shall have the same meaning as in that section of the Corporations Code.

On written request to the Board of Directors by any person seeking indemnification under Corporations Code Section 5238 (b) or Section 5238 (c) the Board of Directors shall promptly decide under Corporations Code Section 5238 (e) whether the applicable standard of conduct set forth in Corporations Code Section 5238 (b) or Section 5238 (c) has been met and, if so, the Board of Directors shall authorize indemnification.



## ARTICLE XII

### INSURANCE

Section 1. INSURANCE, This Corporation shall have the right to purchase and maintain insurance to the full extent permitted by law on behalf of its officers, directors, employees, and other agents, to cover and liability asserted against or incurred by any officer director, employees, or agent in such capacity arising from the officer's, director's, employee's, or agent's status as such.

## ARTICLE XIII

### MAINTENANCE OF CORPORATE RECORDS

Section 1. MAINTENANCE OF CORPORATE RECORDS. This corporation shall keep the following:

- (a) Adequate and correct books and records of account;
- (b) Written minutes of the proceedings of its members, board and committees of the board; and
- (c) Such reports and records as required by law.

## ARTICLE XIV

### INSPECTION RIGHTS

Section 1. DIRECTORS' RIGHT TO INSPECT. Every director shall have the right at any reasonable time to inspect the corporation's books, records, documents of every kind, physical properties, and the records of each subsidiary as permitted by California and federal law. The inspection may be made in person or by the director's agent or attorney. The right of inspection includes the right to copy and make extracts of documents as permitted by California and federal law. The right to inspect may be circumscribed in instances where the right to inspect conflicts with California or federal law (e.g., restrictions on the release of educational records under FERPA) pertaining to access to books, records, and documents.

Section 2. MAINTENANCE AND INSPECTION OF ARTICLES AND BYLAWS. This corporation shall keep at its principal California office the original or a copy of the articles of incorporation and bylaws, as amended to the current date, which shall be open to inspection by the directors at all reasonable times during office hours.

## ARTICLE XV

### REQUIRED REPORTS

Section 1. ANNUAL REPORTS. The board of directors shall cause an annual report to be sent to the board of directors within 120 days after the end of the corporation's fiscal year. That report shall contain the following information, in appropriate detail:

- (a) The assets and liabilities, including the trust funds, or the corporation as of the end of the fiscal year.
- (b) The principal changes in assets and liabilities, including trust funds;
- (c) The corporation's revenue or receipts, both unrestricted and restricted to particular purposes;
- (d) The corporation's expenses or disbursements for both general and restricted purposes;
- (e) Any information required under these bylaws; and
- (f) An independent accountant's report or, if none, the certificate of an authorized officer of the corporation that such statements were prepared without audit from the corporation's book and records.

### Section 2. ANNUAL STATEMENT OF CERTAIN TRANSACTIONS AND INDEMNIFICATIONS.

As part of the annual report to all members, or as a separate document if no annual report is issued, the corporation shall, within 120 days after the end of the corporation's fiscal year, annually prepare and mail or deliver to each member and furnish to each member and furnish to each director a statement of any transaction or indemnification of the following kind:

(a) Any transaction (i) in which the corporation, or its parent or subsidiary, was a party, (ii) in which an "interested person" had a direct or indirect material financial interest, and (iii) which involved more than \$50,000.00 or was one of several transactions with the same interested person involving, in the aggregate more than \$50,000.00. For this purpose, an "interested person" is either:

- (1) Any director or officer of the corporation, its parent, or subsidiary (but mere common directorship shall not be considered such an interest); or
- (2) Any holder of more than 10 percent of the voting power of the corporation, its parent, or its subsidiary. This statement shall include a brief description of the transaction, the names of interested persons involved, their relationship to the corporation, the nature of their interest, provided that if the transaction was with a partnership in which the interested person is a partner, only the interest of the partnership need be stated.

(b) The amount and circumstances of any indemnifications aggregating more than \$10,000 paid during the fiscal year to any director or officer of the corporation pursuant to Article XII of these bylaws.

ARTICLE XVI

BYLAW AMENDMENTS

Section 1. BYLAW AMENDMENTS. The Board of Directors may adopt, amend or repeal any of these bylaws by a majority vote of the directors present at a meeting duly held at which a quorum is present, except that no amendment shall change any provisions of any charter governing any charter school operated as or by the Corporation or make any provisions of these bylaws inconsistent with such charter, the Corporation's articles of incorporation, or any laws.

CERTIFICATE OF SECRETARY

I certify that I am the duly elected and acting Secretary of the Institute of Human Development Charter School, a California nonprofit public benefit corporation; that these bylaws, consisting of 13 pages, are the bylaws of this corporation as adopted by the board of directors on \_\_\_\_\_; and that these bylaws have not been amended or modified since that date.

Executed on \_\_\_\_\_ at \_\_\_\_\_, California.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Secretary

Printed Name



# California Secretary of State

Business Programs Division

1500 11th Street, Sacramento, CA 95814

## Thank You for Doing Business in California

Congratulations on your new business registration with the California Secretary of State (SOS).

### What's next?

- 1. Resources for Businesses Just Starting** – The Secretary of State provides additional business resources at [bizfile.sos.ca.gov](http://bizfile.sos.ca.gov) to help guide you through the process of starting your business, including:
  - Starting A Business Guide & Checklist – [www.sos.ca.gov/business-programs/business-entities/starting-business-checklist/](http://www.sos.ca.gov/business-programs/business-entities/starting-business-checklist/) for key steps you may need to take when launching a business in California.
  - SOS Business Resources – [www.sos.ca.gov/business/be/resources](http://www.sos.ca.gov/business/be/resources) for a list of agencies you may need to contact to ensure proper compliance with California state law.
- 2. Corporations and Limited Liability Companies Can File SOS Statement of Information Online** – For faster service, file your initial Statement of Information and any future Statements of Information anytime online by logging into your **bizfile** Online account at [bizfileOnline.sos.ca.gov](http://bizfileOnline.sos.ca.gov). To file, select the Statement of Information document, complete and submit online. Statements by Common Interest Development Association also can be filed online with your Statement of Information.

You are required to file a Statement of Information **within the first 90 days** of registering your business with the SOS and you are statutorily required to maintain your business by filing a Statement of Information, either every year for stock corporations or every other year for nonprofit corporations and LLCs, before the end of the calendar month of the original registration date. Please see the table below for your specific entity type. NOTE: You may be assessed a \$250 penalty for not filing your Statement of Information.

Entity Type (Jurisdiction)	Initial Due Date	Frequency of Filing
All Stock Corporations (California)	Within 90 Days	Annually
Out-Of-State Corporations	Within 90 Days	Annually
Credit Unions	Within 90 Days	Annually
Agricultural Cooperatives (California)	Within 90 Days	Annually
Canabis Cooperative Associations	Within 90 Days	Annually
General Cooperatives	Within 90 Days	Every Other Year
Nonprofit Corporations (California)	Within 90 Days	Every Other Year
Nonprofit Corporations - Common Interest Development*	Within 90 Days	Every Other Year
Limited Liability Companies	Within 90 Days	Every Other Year
All Other Business Entity Types	Statement Of Information Not Required	

\* Corporations formed as a Common Interest Development must file a Statement by Common Interest

Development with their Statement of Information.

3. **Franchise Tax Board (FTB) Tax Filing** – Once your entity is registered with the SOS, you are required to file a tax return with FTB for each taxable year, even if you are not conducting business or have no income. Contact FTB at [www.ftb.ca.gov](http://www.ftb.ca.gov) or (800) 852-5711 for forms and requirements concerning franchise taxes or income taxes.

Be aware, if you fail to file a return by the original or extended due date, or fail to pay taxes when due, a penalty may be imposed by FTB. Please visit [www.ftb.ca.gov/businesses/Penalty-Information.shtml](http://www.ftb.ca.gov/businesses/Penalty-Information.shtml) for tax penalty related information.

#### 4. **Business Names and Trademarks**

Registration of a business with the Secretary of State does not in itself establish a trademark for the business name. There is a separate legal process to establish a trademark or service mark. Additionally, registration of a business with the Secretary of State does not authorize the use of a business name in violation of another person's or entity's rights to the name, such as infringement of a trademarked word or phrase.

The Secretary of State's office maintains registration and all updates of California state trademarks and service marks. Information is accessible via our California Trademark Search at [tmbizfile.sos.ca.gov/search](http://tmbizfile.sos.ca.gov/search), which also provides free PDF copies of imaged Trademark documents.

For more information on the registration of business names and registering a trademark, visit:

- General provisions governing trademarks and service marks are found in the Model State Trademark Law – [California Business and Professions Code sections 14200 et seq](#)
- Federal Trademark Act – [United States Code, Title 15, Chapter 22, section 1051 et seq.](#)
- California Fictitious Business Name Law – [Business and Professions Code section 17900 et seq.](#)
- Common law rights, including rights to a trade name.

If you have any questions regarding such rights, please consult a private attorney.

#### 5. **Nonprofit Corporations**

Nonprofit corporations in California are **not automatically exempt** from paying California franchise taxes or income taxes each year. For information about tax requirements and/or applying for tax exempt status, please contact the appropriate taxing agency listed below. If you are a domestic nonprofit public benefit corporation, you likely have filing requirements with the California Office of the Attorney General.

[https://oag.ca.gov/sites/all/files/agweb/pdfs/charities/publications/guide\\_for\\_charities.pdf](https://oag.ca.gov/sites/all/files/agweb/pdfs/charities/publications/guide_for_charities.pdf).

#### **Other Business Information and Resources**

All business entities are subject to state and federal tax laws. You may wish to contact the following agencies to assist you with tax or other business-related issues:

- Internal Revenue Service – [www.irs.gov](http://www.irs.gov) or call (800) 829-4933 for forms and issues concerning Federal tax, employer identification numbers, subchapter S elections.
- California Department of Tax and Fee Administration – [www.cdtdfa.ca.gov](http://www.cdtdfa.ca.gov) or call (800) 400-7115 for forms and issues concerning sales taxes, use taxes or other special taxes and fees administered by the California Department of Tax and Fee Administration.
- Employment Development Department – [www.edd.ca.gov](http://www.edd.ca.gov) or call (888) 745-3886 for forms and issues concerning employment and payroll taxes.
- California State Board of Equalization – [www.boe.ca.gov](http://www.boe.ca.gov) or call (916) 274-3350 for forms and issues concerning property taxes, alcoholic beverage taxes, and taxes on insurers.

- State Compensation Insurance Fund – [www.statefundca.com](http://www.statefundca.com) or call (888) 782-8333 for information or to get a quote for workers' compensation insurance.
- Department of Industrial Relations, Division of Occupational Safety and Health (DOSH), better known as Cal/OSHA - [www.dir.ca.gov](http://www.dir.ca.gov) or call (800) 963-9424 for guidance on workplace safety and health regulations in California.
- CalGold – [www.calgold.ca.gov](http://www.calgold.ca.gov) for appropriate permit, licensing, and contact information for the various agencies that administer and issue these permits.
- CA Governor's Office of Business and Economic Development (Go-Biz) – [www.business.ca.gov](http://www.business.ca.gov) for a range of business services including, site selection and permit assistance.
- The California Business Incentives Gateway (CBIG) – [cbig.ca.gov](http://cbig.ca.gov) is a web portal that connects business owners and entrepreneurs with financial incentives.



# California Secretary of State

Business Programs Division

1500 11th Street, Sacramento, CA 95814

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INSTITUTE OF HUMAN DEVELOPMENT CHARTER  
SCHOOL  
255 N LINCOLN AVE  
CORONA, CA 92882

## Initial Business Filing Approved

November 14, 2023

**Entity Name:** INSTITUTE OF HUMAN DEVELOPMENT CHARTER SCHOOL

**Entity Type:** Nonprofit Corporation - CA - Public Benefit

**Entity No.:** 5977494

**Document Type:** Initial Filing

**Document No.:** 5977494

**File Date:** 11/13/2023

Congratulations! The above referenced document has been approved and filed with the California Secretary of State. To access free copies of filed documents, go to [bizfileOnline.sos.ca.gov](https://bizfileOnline.sos.ca.gov) and enter the entity name or entity number in the Search module.

### ***What's Next?***

Be sure to review the Welcome Letter for key information and contacts you may need.

Corporations and limited liability companies must file a Statement of Information **within 90 days** of the initial filing and annually or every other year, thereafter. For additional resources, view Starting A Business Checklist for key steps you may need to take when launching a business in California.

For further assistance, contact us at (916) 657-5448 or visit [bizfileOnline.sos.ca.gov](https://bizfileOnline.sos.ca.gov).



Thank you for using [bizfile California](https://bizfileOnline.sos.ca.gov), the California Secretary of State's business portal for online filings, searches, business records, and additional resources.

Response 2



## The Founding Group

### **Jordan Campbell**

CEO/Founder

Jordan, one of the most highly-recruited high school football players in the nation, received a football scholarship in 2007 to play football for the University of Southern California. Jordan won back to back Rose Bowl championships and Pac 10 conference championships while at USC. Jordan was then drafted as a free agent by the Bengals. Every off season and summer vacation, Jordan came back to his home town and offered free training camps to the youth players in the city. Jordan's mother gave it to Jordan before she graduated from Rubidoux high school and his biological father was incarcerated. Jordan was raised by his grandfather, his grandmother and his mother. Growing up in Rubidoux, Jordan quickly discovered that people rarely get out of the city and hardly ever get a chance to see a college campus. However, Jordan learned that the word "impossible" is only a word and that anyone can make it out of a bad situation with the right support system. His support system was a football coach who changed his life and motivated him to become something bigger than he thought possible. He remembers growing up in the community and looking up to people like Sammy Knight, former Rubidoux resident and USC graduate who was able to excel as a student athlete. Unfortunately, not many people ever came back to the community to pay it forward and show the next generation how to do it.

Jordan wants to bring his leadership qualities and development abilities to the underserved communities, helping students become equipped with the knowledge and skills to become leaders in life. He understands not being able to ask parents for help on homework or help on filling out a college application. He also knows the feeling of how special it feels to be the first person in a family to go to college and break the cycle of working a job that you hate for the rest of your life. His only focus when he left for college at 18 years old was to be able to come back home to his community and pay it forward to the next generation like his mentor did for him. His primary focus is to help students dream big and provide them with the skills and opportunities to become whatever they aspire to be, no matter their circumstance.

## **Teague Egan**

Co-Founder

Teague Egan is the Founder and CEO of EnergyX and son of Michael Egan, who had been among the founders of the Alamo Rent a Car company. He is responsible for all aspects of building the company into a world leader in renewable energy technologies. His focus is on commercializing the LiTAS™ technology for direct lithium extraction and the company's SoLiS™ solid state battery electrolytes. Philanthropy is immensely more important to Egan than his accomplishments in the business world. Most of his philanthropic efforts are associated with the Thomas E. Smith Foundation. He is the co-founder of Dance For Paralysis, The Reality Ride Challenge, and The Kindness 365. He started traveling the entire United States for 365 days on the kindness bus, to all 50 states, to do random acts of kindness and bring unity back to America. After graduating in business entrepreneurship at the University of Southern California, Egan went on to complete the Executive Program in exponential technology including artificial intelligence, synthetic biology, and nanotechnology at Singularity University.

From the beginning, the startup company has been focused on lithium extraction and recovery technology. It started out as a R&D project based on the technology developed by the Research Center for Materials for Water and Energy Systems (M-WET) at the University of Texas in Austin and directed by the chemical engineer and professor Benny D. Freeman. In 2019, EnergyX acquired and licensed lithium extraction technology (LiTAS) from the University of Texas and further developed the procedural knowledge of direct lithium extraction (DLE) in its scientific center located in Austin, Texas.

In 2021, EnergyX secured \$20 million in direct funding that came from Obsidian Acquisition Partners, Helios Capital and a variety of other angels and institutions.<sup>1</sup> The company raised nearly \$5 million through crowdfunding. In July of 2022 Energy X secured a 450 million dollar investment from a global emerging market group. And most recently, they just announced a \$50 million dollar Series B investment and strategic agreement led by General Motors. The New York Times called EnergyX an “American Underdog” and noted that " EnergyX was one of two from the United States among the eight contenders to develop Bolivia’s lithium reserves. The company develops direct lithium extraction (DLE) technology based on the proprietary LiTAS method. The method includes filtering of the brine that contains lithium through a series of selective membranes, separating various types of salts, such as magnesium, sodium, potassium, sulfate and other chemicals from lithium.

**Renee Zappez**

Head of School/ Head of Elementary

Renee always dreamed of being a teacher, even as a young girl. Losing her mom at the young age of 14 only reinforced how much she wanted to help children, especially those from single-parent households. Luckily enough, she was blessed to have a dad that was a stockbroker and very math oriented. This fostered a love of math from the beginning. When it came time to decide her major, most would have thought she would choose education. However, she choose to major in Psychology and Social Behavior at the University of California, Irvine because she wanted to understand the role the environment plays in childrens' thoughts and actions. She then went on to obtain her teaching credential from California State University, Fullerton.

Along the way towards being fully credentialed, Renee had the opportunity to work as a reading intervention aide and a long term substitute at an elementary school. This gave her the opportunity to experience all aspects of teaching. From there, she became a first grade teacher, working first with severely underprivileged students in Santa Ana, then moving on to teaching first grade in Ladera Ranch. Once her son was born, she decided it was of utmost importance to be a mom as much as possible, so she took a hiatus from teaching to tutor for 15 years. She was able to help a tremendous amount of students in all grades from kindergarten up to college, focusing primarily on reading for the younger students and math for all grades. A self-proclaimed "math geek", her goal was to make math fun and enjoyable, not something that is scary nor something that should be feared. Working with a multitude of grades gave her exposure to many different curriculums from many different types of schools.

When it came time to go back to teaching full-time, Renee did not want to go back to the traditional route. Instead, she chose to look into charter schools, loving the freedom it offers children to learn in their own way, doing what works best for their learning. Just as with tutoring, she has enjoyed being able to work with a wide range of ages. Working for a charter school brings a whole new aspect to teaching; she doesn't just work with students, she gets the opportunity to work with the family. The complete unit of the student-teacher-family connection is tremendously important to a child's learning. Charter schools have opened a window into unique learning plans that Renee is excited to continue being a part of.

## **Michelle Savage**

Assistant Head of School/Head of Secondary

Michelle is a creative, passionate educator, leader, and mentor who believes that all children can learn and thrive in an environment that is stimulating, comforting, and appropriate to their unique talents and abilities. Her career spans over 25 years, beginning as a special education instructional aide in Chino Valley public schools. Since then she has worked as a long-term substitute teacher and fulltime classroom teacher in a traditional public school as well as working with a variety of students in public charter schools both in person and in virtual settings. Michelle believes in a balanced blend of motivational and targeted instruction methodologies to enhance curricula while focusing on rigor, relevance, and relationships. She works closely with parents and all stakeholders to ensure students are receiving equitable, high quality education. She believes in the power of professional development and believes collaboration will allow teachers and students to build on their strengths and grow in new ways.

Michelle has always known she would end up in education, as the daughter of a teacher and a single mother who was a teacher, it fostered a love of learning and a desire to educate others. As a high school student she had the honor of learning from an amazing AP Government teacher who furthered her love of History and fostered that into a love of the American Political System. As a young adult Michelle started working as an Instructional Aide for High School Moderate/Mild education. This taught her a lot about understanding students and their different educational needs. It also gave her a strong foundation in the legalities that go along with Special Education students. When she started college she decided to major in Social Science with an emphasis in Political Science in order to eventually earn her Single Subject credential in Social Science. Michelle earned her Bachelor's of Arts degree in Social Science from Chapman University and went on to complete her Single Subject Credential from Brandman University. While attending college Michelle continued to work as an instructional aide and during her Credential program began working as a Long Term substitute teacher. As a long-term substitute teacher she worked at several Title 1 high schools and Junior High schools. Having the opportunity to work in many different classrooms gave Michelle the opportunity to learn about different curriculums as well as teaching styles. This helped shape her as she entered her own classroom where she spent almost a decade teaching World History, World History Honors, US History, AP US History, and Government. Michelle has also spent the last 5 years working both in person and virtually in a charter school setting where she was able to learn and implement a variety of different curricula and teaching styles that would most benefit her wide array of students.

In addition to her career as an educator Michelle has also volunteered as a parent advocate to different districts and as a result has a strong understanding of California State Educational Code and a strong understanding of what schools should be providing to both General education and Special education students. She is excited to be a part of IHD and create such a new and needed charter school in the Inland Empire that will benefit students from all backgrounds but specifically underprivileged students that would not otherwise have access to the innovative curriculum that IHD through its partnership with Energy X and WCA will provide local students.

## **Lindsey Campizta**

### **Head of Business Administration & Student Services**

My name is Lindsey Campizta, a paraprofessional for the past 7+ years in the CNUSD and Winner Circle Athletics Academy. I am a proud parent of two student-athletes in the WCA Academy. I found my passion in working with student-athletes while navigating through the process with my own two sons. Student-athletes face a unique challenge and I feel it is important to provide support in every aspect of their journey. I admire student-athletes for their dedication and strong drive to be the best they can be, on and off the field. It is my goal to help instill a strong foundation in the classroom and foster their creativity. I strive to help them remain focused, prioritize being a student first and an athlete second, build strong study habits, and to practice speaking and communicating clearly with fellow student-athletes and adults. My motto is “every day is a new day”, we are all learning and deserve grace in our lessons. In my spare time I enjoy volunteering for my older son’s football team and upholding the Mater Dei football traditions. I also enjoy riding my horse on trails both locally and traveling throughout the beautiful California trails. When I’m home with my family, we like to cook and have family game nights.

## **Courtney Sparling**

### **Program Coordinator Courtney**

Courtney Sparling is the Senior Brand Marketing Manager at EnergyX based in Austin, TX, and leading all program efforts related to the charter school from the company’s side along with company Founder & CEO, Teague Egan. She attended Rollins College in Winter Park, Florida where she received her MBA with a concentration in Marketing. Courtney’s career spans the Project Management and Marketing fields, working at companies including Disney and Whole Foods Market, before joining EnergyX. She has always enjoyed working with children and grew up volunteering at school summer camps for elementary and middle school students, as well as being a nanny throughout college. She strongly believes that giving children the right tools will allow them the ability to blossom with how their own incredible minds work - which can make such an impact on their lives and the future.

My goal for this charter school is to support the charter school partnership from the company’s side, leveraging EnergyX’s resources to fully enrich students with real, hands-on learning through bringing real world applications to related grade-specific learning modules that integrate environmental preservation, energy, lithium / battery materials topics, alongside Renee and Michelle according to common core state standards for teaching. Giving students this kind of real world experience and connection will prepare them for a rapidly, ever-changing future and for roles that might not even exist today - much like EnergyX’s technology and roles developed at the company with our scientists and engineers.

For the charter school, I will focus on accomplishing my goals by facilitating this kind of connection from classroom to the real world through:

- Planning recurring field trips on site to EnergyX and Salton Sea test bed site

- Coordinating travel of scientists and engineers from EnergyX to the students
- Managing all virtual office hours, lessons and guest presentations from EnergyX
- Collaborating on hands on activities and curriculum

***Jake Lee***

Director of Mental Development, M.S.

Jake Lee is founder of Championship Cognition and director of mental development. Jake has a record of achievement in educational studies and service delivery. Jake's ultimate vision is to be a person who is truly a leader in the world; someone who assists others fulfill their most desired life. Jake's experience encompasses delivering quality, client-specific services, with proficient skills in enhancing confidence, mindfulness and managing stress and anxiety. He has a strong ability to lead individual and group sessions emphasizing mental skill development. Jake demonstrates aptitude in consistently establishing well-built rapport, essential for client connection and investment toward meeting and surpassing goals.

Jake's mission is accomplished through:

- Developing and conducting weekly workshops (elective course) to educate students on mental skills and their utilization
- Creating individualized intervention plans to propel overall performance
- Maintaining a client-practitioner environment that does not portray a power dynamic, but rather a working relationship
- Collaborating with parents, teachers, and other support members to learn about students' tendencies and keep each party updated on progress
- Providing mentorship and support
- Actively listening and clearly articulating ideas, thoughts, and instructions
- Partnering an accepting and empathetic nature to assist in guiding clients through difficult and stressful times

Jake ensures to carry out the following values:

- **Excellence** – I commit to fully investing in the students I work with so their optimal performance is obtained
- **Respect** – I pledge to treat all people with dignity, open-mindedness, and esteem
- **Integrity** – I act and communicate with complete honesty, transparency, and authenticity
- **Diversity** – I value an inclusive environment in which diverse backgrounds and perspectives are not only welcomed and appreciated, but viewed and used as integral steps towards growth
- **Adaptation** – I find comfort in being uncomfortable. I value the furthering in my research and education to provide progressive services
- **Service** – I value and commit to using my knowledge, skills, and ability to provide clients with services based on their individual needs

Though the need for environmental experiences is apparent, a current turn of events has made these opportunities even more scarce. The Lawrence Hall of Science at the University of California, Berkeley conducted a nationwide study during April 2020 to explore the impact of the COVID-19 pandemic on the environmental and outdoor science education field. Environmental and outdoor science education is critical to the national educational system. Schools use these off-campus programs to provide meaningful experiences that engage students in the natural world. It was projected that “by May 31, 2020, an estimated 4 million learners will have missed the opportunity to engage in these programs” (The Lawrence Hall of Science, 2020). According to the study, that number would increase to more than 11 million if these agencies were required to stay closed through 2020. The study shows that youth from marginalized communities are the most severely affected. An estimated 58% of the students impacted by the COVID-19 cancellations qualify for free or reduced-priced meals, are English learners, or come from other marginalized communities. Looking beyond that, if closures continue through the end of the year, only 22% of the environmental program leaders anticipate being able to reopen, while 30% report they will be unable to reopen.

Response 3



# **Institute of Human Development Conflict of Interest Policy**

## **PURPOSE:**

The Institute of Human Development Charter School Board desires to maintain the highest ethical standards and help ensure that decisions are made in the best interest of the school and the public. In accordance with law, Board members and designated employees shall disclose any conflict of interest and, as necessary, shall abstain from participating in the decision.

## **SCOPE**

This policy applies to all Institute of Human Development Charter School Board members and their applicable actions.

## **GENERAL POLICY STATEMENT:**

### Adoption

In compliance with the Political Reform Act of 1974, California Government Code Section 87100, et seq., The Institute of Human Development Charter School hereby adopts the attached Conflict of Interest Code (“Code”), which shall apply to all corporate officers, governing board members, candidates for member of the governing board, and designated employees of The Institute of Human Development Charter School (“Charter School”), as specifically required by California Government Code Section 87300.

## **POLICY DETAILS:**

### 1.1. Designated Reporters

1.1.1. Employees of the Charter School, as well as corporate officers, governing board members and candidates for election and/or appointment to the governing board, who hold positions that involve the making or participation in the making, of decisions that may foreseeably have a material effect on any financial interest, shall be a “designated reporter”. A complete list of the Designated Reporter positions are listed in “Exhibit A” attached to this policy and incorporated by reference herein.

### 1.2. Statement of Economic Interests: Filing

1.2.1. Each Designated Reporter shall file a Statement of Economic Interest (Statement) at the time and manner prescribed below, disclosing reportable investments, interest in real property, business positions, and income required to be reported under the category or categories to which the position is assigned in “Exhibit A”. An investment, interest in real property or income shall be reportable, if the business entity in which the investment is held, the interest in real property, the business position, or source of income may foreseeably be affected materially by a decision made or participated in by the Designated

Reporter by virtue of his or her position. The specific disclosure responsibilities assigned to each position are set forth in Exhibit B. All statements shall be filed with the Clerk of the Riverside Board of Supervisors.

1.3. Disqualification

1.3.1. No Designated Reporter shall make, participate in making, or try to use his/her official position to influence any Charter School decision which he/she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the official or a member of his or her immediate family.

1.4. Manner of Disqualification

1.4.1 Non-Governing Board Member Designated Employees

1.4.1.1 When a non-Governing Board Member Designated Employee determines that he/she should not make a decision because of a disqualifying interest, he/she should submit a written disclosure of the disqualifying interest to his/her immediate supervisor. The supervisor shall immediately reassign the matter to another employee and shall forward the disclosure notice to the Institute of Human Development's Executive Director, who shall record the employee's disqualification. In the case of a Designated Employee who is head of an agency, this determination and disclosure shall be made in writing to his/her appointing authority.

1.4.2 Governing Board Member Designated Employees

1.4.2.1 Governing Board Members shall disclose a disqualifying interest at the meeting during which consideration of the decision takes place. This disclosure shall be made part of the Board's official record. The Board Member shall refrain from participating in the decision in any way (i.e. the Board Member with the disqualifying interest shall refrain from voting on the matter and shall leave the room during Board discussion and when the final vote is taken) and comply with any applicable provisions of the Institute of Human Development bylaws.

**NON-COMPLIANCE TO POLICY:**

Violations of this policy may result in the Board Member or employee being subject to Disciplinary action in accordance with Board disciplinary policy and administrative regulations.

**CONFLICT OF INTEREST CODE:**

*The Institute of Human Development Charter School*

The Political Reform Act, Government Code section 81000 et seq., requires local government agencies to adopt and promulgate Conflict of Interest Codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code Regs., § 18730) which contains the terms of a standard Conflict of Interest Code, which may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act after public notice and hearings. The terms of California Code of Regulations, Title 2, Section 18730, and any amendment to it duly adopted by the Fair Political Practices Commission, are hereby incorporated by reference as the Conflict of Interest Code for the institute of Human Development Charter School, and along with the attached Exhibit A, which designates positions requiring disclosure and Exhibit B, which sets forth disclosure categories for each designated position, constitute the Conflict of Interest Code of the Institute of Human Development Charter School]. Persons holding positions designated in Exhibit A shall file Form 700 Statements of Economic Interests with the Clerk of the Riverside County Board of Supervisors. Form 700 must be filed annually and within 30 days of assuming or leaving office.

IN PREPARING THE FORM 700, DESIGNATED FILERS NEED ONLY DISCLOSE THOSE FINANCIAL INTERESTS FALLING WITHIN THE DISCLOSURE CATEGORIES DESIGNATED FOR THAT FILER'S POSITION AS STATED IN EXHIBITS A AND B.

## EXHIBIT A

### Designated Positions

- I. Persons occupying the following positions, as applicable, are designated employees and must disclose financial interests in category 1, defined in “Exhibit B.”
  - A. Members of the Governing Board (5)
  - B. Candidates for Member of the Governing Board
  - C. Executive Director of Charter School (1)
  - D. Assistant Director of Charter School (1)
  - E. Business Officer
  - F. Assistant Business Officer
  - G. Consultants (\*)
- II. Persons occupying the following positions are designated employees and must disclose financial interests defined in Category 4 of “Exhibit B.”
  - A. Purchasing Director
  - B. Assistant Purchasing Director
- III. Persons occupying the following positions are designated employees and must disclose financial interests defined in Categories 4, 5 and 6 of “Exhibit B.”
  - A. Information Systems Director
  - B. Contractors (\*)

(\*) The Director may determine, in writing, that a particular consultant, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus not required to fully comply with the disclosure requirements in this section. Such written determination shall include a description of the consultant’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Director’s determination is a public record and shall be retained for public inspection in the same manner and location of interest code.

## **EXHIBIT B**

### *Disclosure Categories:*

The terms *italicized* below have specific meaning under the Political Reform Act. In addition, the financial interests of a spouse, domestic partner and dependent children of the public official holding the designated position may require reporting. Consult the instructions and reference pamphlet of the Form 700 for explanation.

#### Category 1

Broadest Disclosure [See Form 700 Schedules A-1, A-2, B, C, D and E]

- 1. All sources of income, gifts, loans and travel payments;*
- 2. All interests in real property; and*
- 3. All investments and business positions in business entities.*

#### Category 2

Real Property [See Form 700 Schedule B]

All interests in real property, including interests in real property held by business entities and trusts in which the public official holds a business position or has an investment or other financial interest.

#### Category 3

Land Development, Construction and Transaction [See Form 700 Schedules A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which engage in land development, construction, or real property acquisition or sale.

#### Category 4

Procurement [See Form 700 Schedules A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which provide services, supplies, materials, machinery or equipment which the designated position procures or assists in procuring on behalf of their agency or department.

#### Category 5

Regulation and Permitting [See Form 700 Schedules A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which are subject to the regulatory, permitting or licensing authority of, or have an application or license pending before, the designated position's agency or department.

## Category 6

Funding [See Form 700 Schedules A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which receive grants or other funding from or through the designated position's agency or department.

## APPENDIX A

### Designating Officers Who Manage Public Investments

Pursuant to Government Code section 87200 et seq., certain city and county officials, as well as all "other officials who manage public investments," are required to disclose their economic interests in accordance with the Political Reform Act. This Appendix provides the relevant definitions for determining which public officials qualify as "other officials who manage public investments," designates the agency's positions which qualify as such, and states the Filing Officer for each designated position.

### Applicable Definitions

As set forth in 2 California Code of Regulations section 18701, the following definitions apply for the purposes of Government Code section 87200:

1. "*Other public officials who manage public investments*" means:
  - a. Members of boards and commissions, including pension and retirement boards or commissions, or of committees thereof, who exercise responsibility for the management of public investments;
  - b. High-level officers and employees of public agencies who exercise primary responsibility for the management of public investments, such as chief or principal investment officers or chief financial managers. This category shall not include officers and employees who work under the supervision of the chief or principal investment officers or the chief financial managers; and
  - c. Individuals who, pursuant to a contract with a state or local government agency, perform the same or substantially all the same functions that would otherwise be performed by the public officials described in subdivision (1)(B) above.
2. "*Public investments*" means: the investment of public money in real estate, securities, or other economic interests for the production of revenue or other financial return.

3. *“Public moneys”* means: all moneys belonging to, received by, or held by, the state, or any city, county, town, district, or public agency therein, or by an officer thereof acting in his or her official capacity, and includes the proceeds of all bonds and other evidences of indebtedness, trust funds held by public pension and retirement systems, deferred compensation funds held for investment by public agencies, and public moneys held by a financial institution under a trust indenture to which a public agency is a party.
4. *“Management of public investments”* means: the following non-ministerial functions: directing the investment of public moneys; formulating or approving investment policies; approving or establishing guidelines for asset allocations; or approving investment transactions.

Response 4



**MEMORANDUM OF UNDERSTANDING  
BETWEEN  
Ka Waihona  
AND  
WINNER'S CIRCLE ATHLETICS (WCA)**

This Memorandum of Understanding (MOU) is made and entered into by and between Ka Waihona and Winner's Circle Athletics (WCA).

**I. PURPOSE:**

The purpose of this MOU is to document the relationship that will exist between Ka Waihona and WCA

**II. STATEMENT OF MUTUAL BENEFIT AND INTEREST:**

The parties to this MOU have shared interests in providing enrichment opportunities to the communities mutually served.

**III. EACH PARTY SHALL:**

A. WCA will offer a specific enrichment package to Ka Waihona students at their location on regularly scheduled days and hours of no less than ten hours per week for the entire duration of the school year.

8. Ka Waihona will pay WCA a specific amount for the specific enrichment package as outlined below.

C. Package of Services:

Grade Levels and Specific Enrichment Package Offered by WCA	Specific Amount Due on a Monthly Basis per Student from September 1st through June 30th (based on 10 months a year) *
3-12. Specific enrichment activities in the areas of physical conditioning, sport science, nutrition, cognitive perceptual, mental conditioning, leadership, and life skills.	\$650

\* Note: June will be invoiced in July.

D. Ka Waihona will provide a Specialty Program Coordinator (SPC) as a support to assist WCA as a point of contact for administrative support.

- 1) Provide invoicing instructions for enrolled Wa Kaihona students and assist with invoicing questions.
- 2) Provide general guidance/ counsel to WCA when requested.
- 3) Provide mutually agreed upon marketing assistance to WCA when requested.
- 4) Facilitate participation of Ka Waihona students into WCA.
- 5) Provide guidelines for the safety of students while participating in WCA Preferred Vendor program.
- 6) Inform current and new Ka Waihona students about WCA Enrichment Opportunities who reside in nearby areas around WCA.

#### **IV. IT IS MUTUALLY AGREED AND UNDERSTOOD BY AND BETWEEN THE PARTIES THAT:**

- A. PRINCIPAL CONTACTS . The principal contacts for this MOU will be Jordan Campbell for WCA and Executive Director for Ka Waihona.
- B. KEY PARTNERSHIP STAFF. It is agreed and understood that the WCA's key representative for communications is Jordan Campbell and the Ka Waihona key representative is the local Specialty Program Coordinator.
- C. COMMENCEMENT/MOU RENEWAL. This MOU is executed as of the date of the last signature. This MOU will continue, unless otherwise terminated with 30 days ' notice by either party.
- D. NON-SECTARIAN. All activities provided to families as a result of this agreement must be non-sectarian in nature.
- E. PAYMENTS. WCA will invoice on the 1<sup>st</sup> of the month, based on the number of enrolled Ka Waihona students at that time. The invoice will be paid on a Net-30 basis. Invoices are to be submitted for the following 10 months: September through May, and July (June Services).

#### **V. WCA ADDITIONAL VENDOR OPTION:**

- A. WCA may elect to offer enrichment opportunities to non-Preferred Vendor students enrolled in Ka Waihona as a vendor.
- B. Process of Ka Waihona students receiving services.
  - 1) Parents will come to vendor to request a schedule of enrichment activities and pricing. They will make a choice based on their liking and submit their request to their Teacher.
  - 2) The Enrichment Ordering System staff will then generate an Enrichment Certificate for the vendor and provide it to the parent.
  - 3) The parent will bring the Enrichment Certificate to the vendor, which will include the amount, type of service, and length of service.
- C. Vendor Payment Process
  - 2) Vendor will remit one invoice for all services, itemized by student, at the end of each month to Ka Waihona accounts payable.
  - 3) Payment will be sent to the legal name and address of the vendor.
  - 4) Ka Waihona will issue to vendor a payment in the form of a check within net-30 basis.

#### **VI. GENERAL PROVISIONS:**

- A. Waiver or Breach. The waiver by either party, or the failure of either party to claim a breach of any provision of the Agreement, will not operate or be construed as a waiver of any subsequent breach.
- B. Assignment. The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the legal representatives, successors, and assigns of the parties hereto: provided, however, that this Agreement will not be assignable by either party without consent of the other party.
- C. Governing Law. This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of Hawaii.

D. Partial Invalidity. If any provision of this Agreement is found to be invalid or unenforceable by any court, the remaining provisions herein will remain in effect unless such partial invalidity or unenforceability would defeat an essential business purpose of the Agreement.

In witness whereof, the parties hereto have executed this MOU as of the last date written below:

---

Jordan Campbell  
Owner of WCA, Corona, California

---

Date

Executive Director of Ka Waihona

Date

**MEMORANDUM OF UNDERSTANDING  
BETWEEN  
BROOKFIELD ENGINEERING SCIENCE AND TECHNOLOGY (B.E.S.T.) ACADEMY  
AND  
WINNER'S CIRCLE ATHLETICS (WCA)**

This Memorandum of Understanding (MOU) is made and entered into by and between Brookfield Engineering Science and Technology (B.E.S.T.) Academy and Winner's Circle Athletics (WCA).

**I. PURPOSE:**

The purpose of this MOU is to document the relationship that will exist between B.E.S.T. Academy and WCA.

**II. STATEMENT OF MUTUAL BENEFIT AND INTEREST:**

The parties to this MOU have shared interests in providing enrichment opportunities to the communities mutually served.

**III. EACH PARTY SHALL:**

A. WCA will offer a specific enrichment package to B.E.S.T. Academy students at their location on regularly scheduled days and hours of no less than ten hours per week for the entire duration of the school year.

B. B.E.S.T. Academy will pay WCA a specific amount for the specific enrichment package as outlined below.

C. Package of Services:

Grade Levels and Specific Enrichment Package Offered by WCA	Specific Amount Due on a Monthly Basis per Student from September 1 <sup>st</sup> through June 30 <sup>th</sup> (based on 10 months a year) *
3-12. Specific enrichment activities in the areas of physical conditioning, sport science, nutrition, cognitive perceptual, mental conditioning, leadership, and life skills.	\$300

\* Note: June will be invoiced in July.

D. B.E.S.T. Academy will provide a Specialty Program Coordinator (SPC) as a support to assist WCA as a point of contact for administrative support.

- 1) Provide invoicing instructions for enrolled B.E.S.T. Academy students and assist with invoicing questions.
- 2) Provide general guidance/counsel to WCA when requested.
- 3) Provide mutually agreed upon marketing assistance to WCA when requested.
- 4) Facilitate participation of B.E.S.T. Academy students into WCA.
- 5) Provide guidelines for the safety of students while participating in WCA Preferred Vendor program.
- 6) Inform current and new B.E.S.T. Academy students about WCA Enrichment Opportunities who reside in nearby areas around WCA.

**IV. IT IS MUTUALLY AGREED AND UNDERSTOOD BY AND BETWEEN THE PARTIES THAT:**

- A. PRINCIPAL CONTACTS. The principal contacts for this MOU will be Jordan Campbell for WCA and Executive Director for B.E.S.T. Academy.
- B. KEY PARTNERSHIP STAFF. It is agreed and understood that the WCA's key representative for communications is Jordan Campbell and the B.E.S.T. Academy key representative is the local Specialty Program Coordinator.
- C. COMMENCEMENT/MOU RENEWAL. This MOU is executed as of the date of the last signature. This MOU will continue, unless otherwise terminated with 30 days' notice by either party.
- D. NON-SECTARIAN. All activities provided to families as a result of this agreement must be non-sectarian in nature.
- E. PAYMENTS. WCA will invoice on the 1<sup>st</sup> of the month, based on the number of enrolled B.E.S.T. Academy students at that time. The invoice will be paid on a Net-30 basis. Invoices are to be submitted for the following 10 months: September through May, and July (June Services).

**V. WCA ADDITIONAL VENDOR OPTION:**

- A. WCA may elect to offer enrichment opportunities to non-Preferred Vendor students enrolled in B.E.S.T. Academy as a vendor.
- B. Process of B.E.S.T. Academy students receiving services.
  - 1) Parents will come to vendor to request a schedule of enrichment activities and pricing. They will make a choice based on their liking and submit their request to their Homeschool Teacher.
  - 2) The Enrichment Ordering System staff will then generate an Enrichment Certificate for the vendor and provide it to the parent.
  - 3) The parent will bring the Enrichment Certificate to the vendor, which will include the amount, type of service, and length of service.
- C. Vendor Payment Process
  - 1) Vendor will remit one invoice for all services, itemized by student, at the end of each month to [jmays@bestacademycs.com](mailto:jmays@bestacademycs.com).
  - 2) Payment will be sent to the legal name and address of the vendor.
  - 3) B.E.S.T. Academy will issue to vendor a payment in the form of a check within net-30 basis.

**VI. GENERAL PROVISIONS:**

- A. Waiver of Breach. The waiver by either party, or the failure of either party to claim a breach of any provision of the Agreement, will not operate or be construed as a waiver of any subsequent breach.
- B. Assignment. The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the legal representatives, successors, and assigns of the parties hereto; provided, however, that this Agreement will not be assignable by either party without consent of the other party.
- C. Governing Law. This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of California.

D. Partial Invalidity. If any provision of this Agreement is found to be invalid or unenforceable by any court, the remaining provisions herein will remain in effect unless such partial invalidity or unenforceability would defeat an essential business purpose of the Agreement.

In witness whereof, the parties hereto have executed this MOU as of the last date written below:

---

Jordan Campbell  
Owner of WCA, Corona, California

---

Date



---

James W. Mays, III  
Executive Director of B.E.S.T. Academy

---

7 - 8 - 19

Date

**MEMORANDUM OF UNDERSTANDING**  
**Between**  
**Academy of Sports Science (SSA)**  
**And**  
**Winner's Circle (WC)**

This Memorandum of Understanding (MOU) is made and entered into by and between Academy of Sports Science (SSA) and Winner's Circle (WC). The entities listed above may collectively be referred to as the parties to this MOU.

**I. PURPOSE:**

The purpose of this MOU is to document a partnership that will exist between Academy of Sports Science and Winner's Circle.

**II. STATEMENT OF MUTUAL BENEFIT AND INTEREST:**

The parties to this MOU have shared interests in providing academic and enrichment services/opportunities to the residents of Anaheim and nearby communities.

**III. EACH PARTY SHALL:**

- A. WC will offer Inspire Enrollment opportunity to their students.
- B. SSA will provide WASC Accredited Academic Program for WC.
- C. SSA will pay for Curriculum, Enrichment Allowance in the form of a check to Winner's Circle, and SSA will pay WC Academic Salaries to designated employees who have State of California credentials:

	Curriculum & Enrichment Allowance to WC/Per student	Enrichment Revenue (Self Generated by WC) \$250.00 (per student/per month)	Total Revenue
6-12 <sup>th</sup> Grade	\$3357.14	\$2,500.00	\$164,800.00

- D. SSA Funded WC Academic Positions will continue to operate as WC Employees.
- E. SSA will provide an assigned staff member as a support to assist WC academic staff on all aspects of compliance. Including giving guidance to WC staff on how to:
  - 1) Collect all enrollment documents for Partnership Students.
  - 2) Facilitate enrollment of students in the curriculum.
  - 3) Collect Monthly Attendance Logs for Partnership Students.
  - 4) Collect Monthly Work Samples for Partnership Students.
  - 5) Inform Current and New Inspire Students about WC Enrichment Opportunities who reside in targeted areas near WC.
- F. Any tuition collected from parents by WC must be for "Enrichment or Other Services," not for "Academic Program;" to avoid Dual Private/Public School "Academic" enrollment.

**IV. IT IS MUTUALLY AGREED AND UNDERSTOOD BY AND BETWEEN THE PARTIES THAT:**

- A. PRINCIPAL CONTACTS. The principal contacts for this MOU will be Jordan Campbell for Winner's Circle and Dr. Lawrence Wynder for Academy of Sports Science.
- B. KEY PARTNERSHIP STAFF. It is agreed and understood that the WC's key representative is Jordan Campbell and the SSA key representative is Christian Gopez.
- C. COMMENCEMENT/EXPIRATION DATE. This MOU is executed as of the date of the last signature and is effective through June 30, 2018 at which time it will expire.
- D. TERMINATION RIGHT. This MOU may be terminated by either party by giving 15 days written notice.

In witness whereof, the parties hereto have executed this MOU as of the last date written below:

\_\_\_\_\_  
Jordan Campbell, Director/Owner of Winner's Circle  
Corona, California

\_\_\_\_\_  
DATE

\_\_\_\_\_  
Dr. Lawrence Wynder, Executive Director of SSA  
Duarte, California

\_\_\_\_\_  
DATE



Response 6

## MEMORANDUM OF UNDERSTANDING

This non-binding Memorandum of Understanding (this "MOU") is made and entered into as of February 15, 2023 (the "Effective Date") by and between Energy Exploration Technologies, Inc. ("EnergyX") whose corporate address is 1624 Headway Circle, Suite 100, Austin TX, 78754 and [The Institute of Human Development] (the "Institute") whose corporate address is [1626 Railroad]. Each of EnergyX and the Institute may be referred to herein individually as a "Party" or collectively as the "Parties".

I. **Purpose.** The purpose of this MOU is to establish the terms and conditions under which each of EnergyX and the Institute shall, individually and jointly as applicable, work and/or cooperate in order to establish a California-based charter school focused on environmental education catering to underserved students (the "Project"). As of the Effective Date, some, but not all, of the fundamental components of partnership for the Project are expected to include the following:

- A. Bi-monthly student visits to an EnergyX facility or related energy-focused facility in which students would be exposed to non-confidential scientific demonstrations, first-person experimentations, written tasks, and other commercially reasonable learning activities;
- B. Bi-monthly guest lectures by certain qualified employees, advisors, officers, directors and/or consultants of EnergyX, such lecturer to be selected at the sole discretion of EnergyX;
- C. Establishment of grade-specific learning modules integrating environmental preservation, energy related topics, and lithium / battery materials topics, as well as enhancement components and common core state standards as listed for example in *Exhibit A*;
- D. Family events designed to establish and reinforce the rapport between school faculty and students and EnergyX
- E. Collaboration between EnergyX and Institute faculty members intended to develop thematic units or experiments based on the Universal Design for Learning whose focus shall be enhancing student learning experience and stimulating scientific curiosity, particularly in the renewable energy industry.

1. For the avoidance of doubt, the learning components set forth in this Section I shall be designed to allow students to regularly engage in hands-on, inquiry-based lessons. EnergyX and Institute staff shall design learning experiences, based on Next Generation Science Standards, that promote curiosity, analysis, reasoning, interpretation, and application. Under this inquiry-based teaching method, a central question shall drive scientific exploration that elicits critical thinking and oral and written

communication of ideas. Institute faculty and staff shall attend training sessions hosted by EnergyX employees and shall collaborate in small teams to create a curriculum across applicable subject areas and grade levels, which curriculum shall be reasonably consistent with California's academic content standards.

II. **Term.** This MOU shall be effective as of the Effective Date and shall terminate upon the earlier of (i) the execution of a long-form definitive agreement or other similar agreement, as applicable and (ii) the twelve-month anniversary of the Effective Date, or (iii) with notice from either Party upon ten (10) days written notice.

III. **Responsibilities of EnergyX.** EnergyX hereby expects in good faith to exert commercially reasonable efforts to fulfill all of the obligations applicable to it as set forth in Section I. Additionally, EnergyX expects to provide overall guidance and industry expertise to support the culmination of the Project.

IV. **Responsibilities of the Institute.** The Institute hereby expects in good faith to exert best efforts to fulfill all of the obligations applicable to it as set forth in Section I. Additionally, the Institute shall submit to a California county of its choice, *provided* that such county materially supports underserved students, the initial charter petition application. Furthermore, the Institute shall deliver to EnergyX any applicable financial projections, capital expenditures estimates, operating expenses estimates, budget analysis and/or other applicable financial information. The Institute shall also make available to EnergyX general infrastructure, including, but not limited, to facilities, classrooms, student campus, etc. The Institute shall procure full and/or part-time faculty and staff reasonably required to maintain and operate the Project and shall recruit students to partake in the Project.

*(Signature page follows)*

IN WITNESS WHEREOF, this Memorandum of Understanding has been executed and delivered by the parties on the date first set forth above.

**ENERGY EXPLORATION TECHNOLOGIES, INC.**

By: \_\_\_\_\_  
Name: Teague Egan  
Title: Chief Executive Officer

**[THE INSTITUTE OF HUMAN DEVELOPMENT]**<sup>1</sup>

By:  \_\_\_\_\_  
Name: Jordan Campbell  
Title: Chief Executive Director

<sup>1</sup> **Note to Institute:** Please insert the correct legal entity name.

## EXHIBIT A

### CHARTER SCHOOL SAMPLE CURRICULUM - GRADE 6

*Four core subjects: English/Writing, Math, Science and History*

**Recommended / Potential Partnerships:** General Motors (EVs), University of Texas at Austin (lab, learning) etc.

#### Clean Energy & Lithium History/Background - History:

##### **Unit 1: Introduction to Clean Energy**

- Lesson 1: What is clean energy and why is it important?
- Lesson 2: Types of clean energy (solar, wind, hydro, geothermal, biomass)
- Lesson 3: How clean energy is used in our daily lives
- Lesson 4: The benefits of clean energy (reducing pollution, saving money, creating jobs)
- Lesson 5: The future of clean energy

##### **Unit 2: Lithium: The Power Behind Clean Energy**

- Lesson 1: What is lithium and where is it found?
- Lesson 2: How lithium is used in clean energy (lithium-ion batteries for electric cars and solar power storage)
- Lesson 3: The process of extracting and processing lithium
- Lesson 4: The impact of lithium mining on the environment
- Lesson 5: How lithium is helping to make clean energy more accessible

##### **Unit 3: Hands-On Learning Ideas**

- Building a solar-powered car
- Designing a wind turbine
- Creating a hydroelectric power model
- Conducting a biomass energy experiment
- Presenting a proposal for a clean energy project in the school or community

##### **Assessments:**

- Quizzes and tests on the material covered in each unit
- Participation in class discussions and hands-on projects
- Final presentation of a clean energy project proposal

### **Chemistry - Science:**

A chemistry focused curriculum should cover topics such as:

1. Matter and its properties
2. Chemical reactions
3. The periodic table
4. States of Matter

Students would learn about the different types of matter, including solids, liquids, and gasses, and how to classify them based on their physical and chemical properties. They should also learn about the different types of chemical reactions, including synthesis, decomposition, and replacement reactions. The curriculum should introduce the periodic table and the elements that make it up, as well as the different states of matter and how to change between them.

### **ESG - English/Writing:**

Part of the curriculum should also include an emphasis on Environmental, Social, and Governance (ESG) topics:

1. Environmental issues such as climate change, pollution, and conservation of natural resources.
2. Social issues such as human rights, fair labor practices, and community engagement.
3. Governance issues such as transparency, ethics, and accountability.

With the school's emphasis on environmental education, it will act as the vehicle or process that leads to environmental literacy in students and their ability to articulate thoughts into writing, take action, and affect informed change.

The curriculum may want to include activities and discussions that encourage critical thinking, problem-solving, and decision-making skills. These activities might include local area case studies, class debates, and group projects that help students learn about different perspectives and develop their own opinions on ESG issues.

Students should also be presented with opportunities to take action on ESG issues, such as participating in local community service projects, organizing awareness campaigns, or writing to local officials.

### Lithium/EnergyX Business - Math:

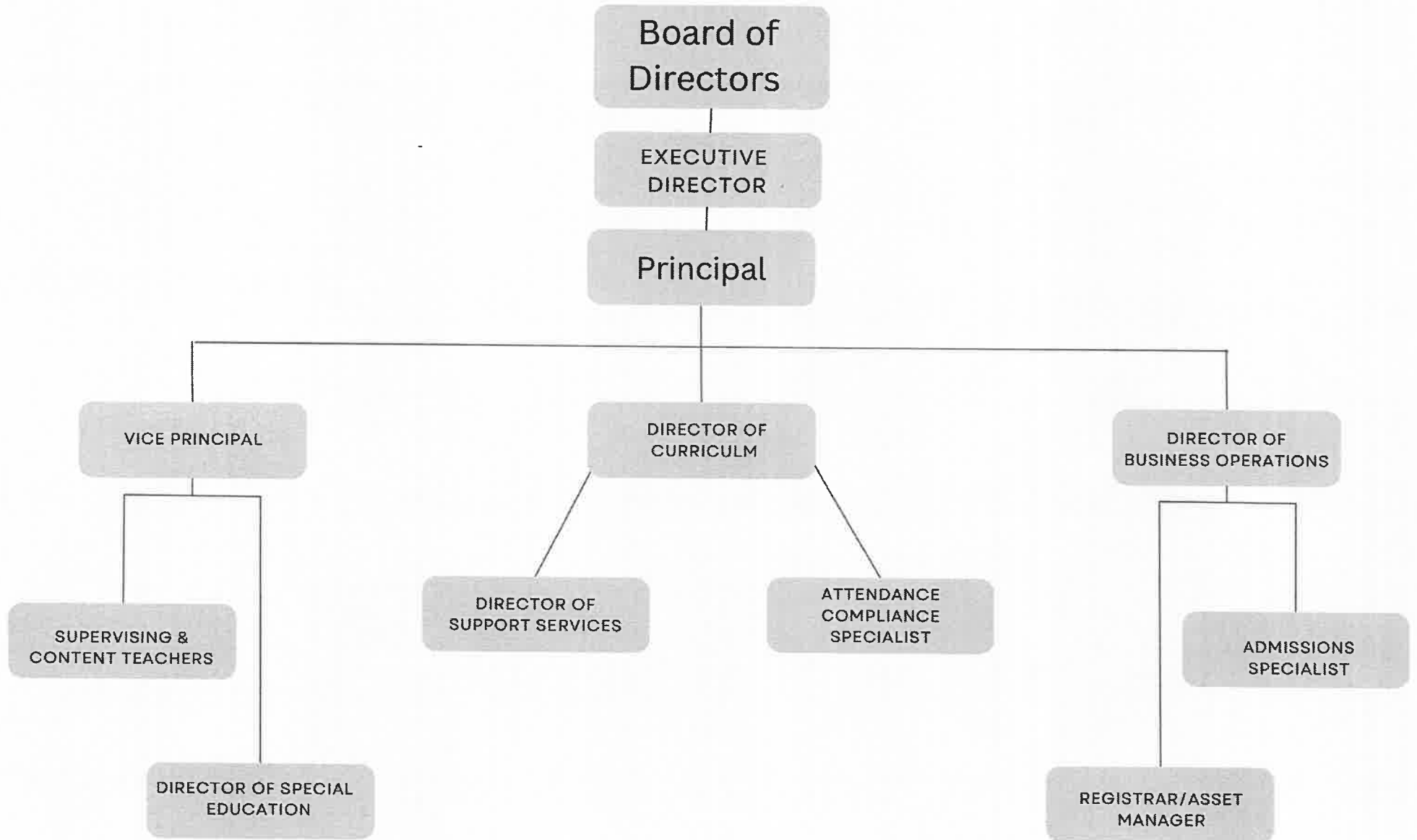
The math curriculum can be focused on EnergyX as a business leader within the lithium industry, with a focus on current costs and figures.

1. Analyze the current lithium industry by looking at charts and trends of the growing supply/demand for lithium as a material. Discuss and make calculations using numbers and percentages.
2. Calculate the differences in cost between lithium and other renewable materials, as well as the current costs of fossil fuels that are currently heavily used.
3. Study EnergyX's business model and budgeting methods to successfully run a startup company.

Response 7



# COMPANY ORGANIZATION CHART



Response 9

Necessary Signatures

Necessary signatures pursuant to Education Code Section 47605(a):

Name: Robert M. Schumm

Signature: 

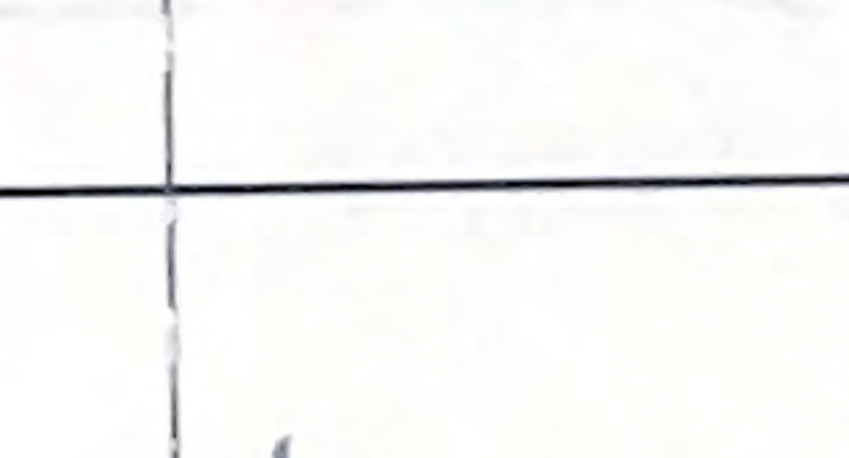
Name: Sakina Myles

Signature: 


Name: NIKKI Little

Signature: 

Name: Nicole Shuey

Signature: 

Name: Patricia Fuentes

Signature: 

Name: Pearl Ortiz

Signature: 

Name: Francisca Arrizon

Signature: 

Name: Jonathon Woolstrum

Signature: 

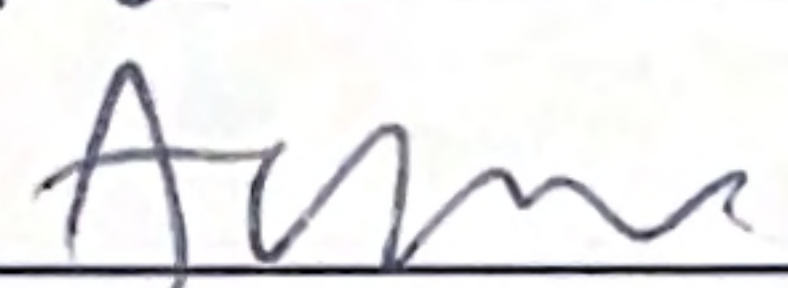
Name: LUCIA Felix

Signature: 


Name: ERIK SAVAGE

Signature: 

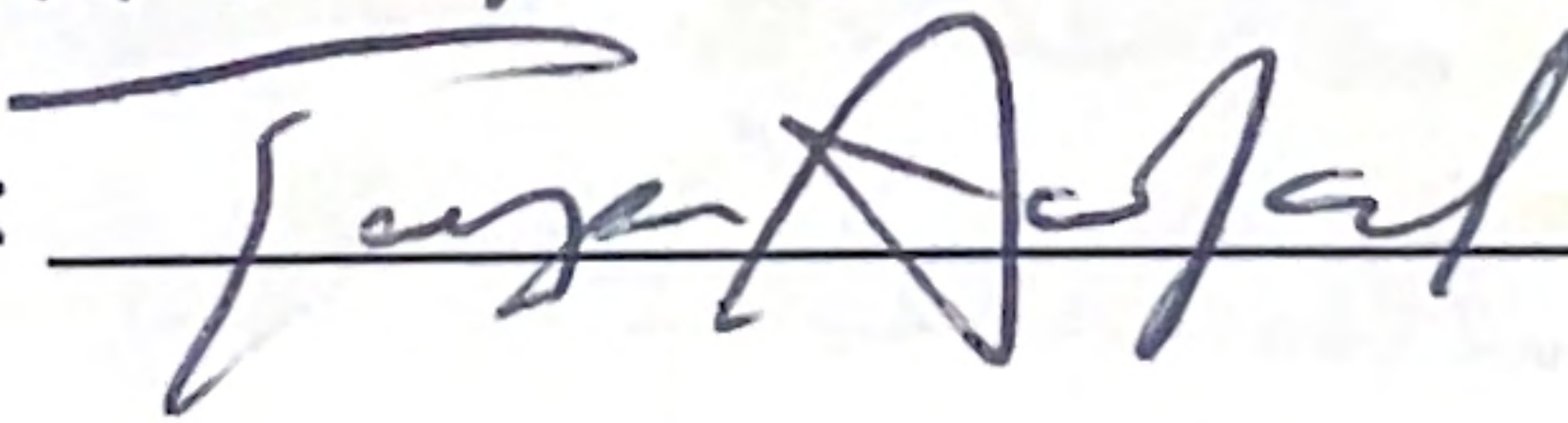
Name: Andreina dracon

Signature: 

Name: CHRISTIANE DYER

Signature: 

Name: TANYA ASHFORD

Signature: 

Name: Serena Joh -

Signature: 

Name: Neilcack

Signature: 

Signature: \_\_\_\_\_


Name: LaToya Walker

Signature: 

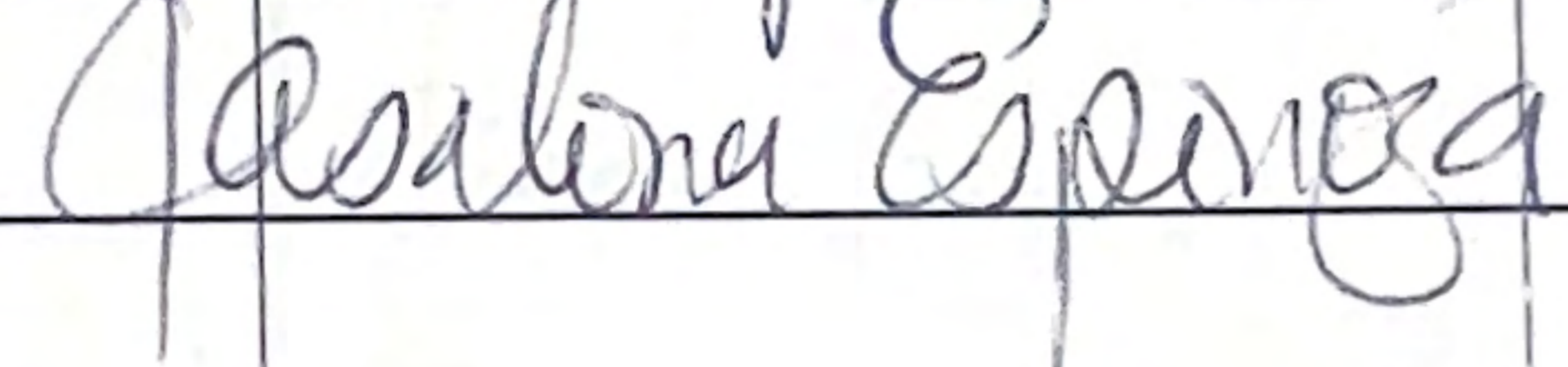
Name: Nicole Kabir

Signature: 


Name: Melissa Blair

Signature: 

Name: Rosalina Espinoza

Signature: 

Name: DAVID LIND

Signature: 

Name: Kenneth Cisneros

Signature: 

Name: Vivian Teran

Signature: 

Name: \_\_\_\_\_


Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

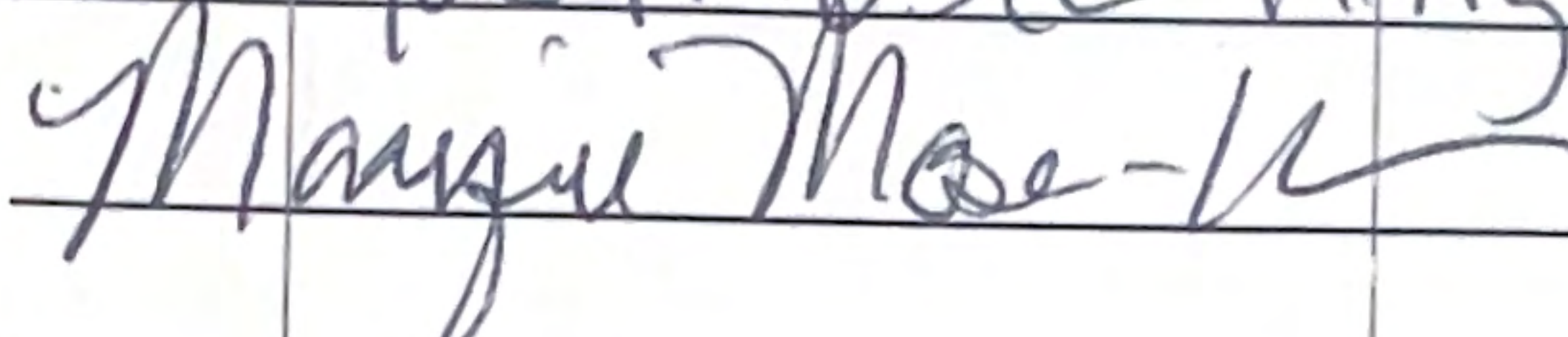
Name: Kye Dural Shantey Barnes

Signature: 

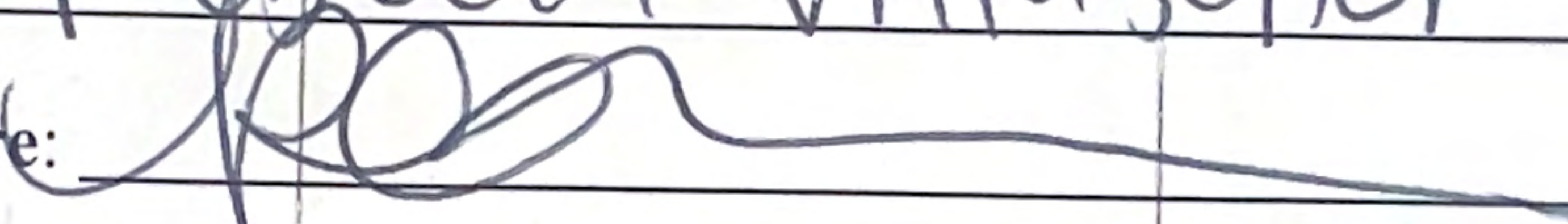
Name: Troy Bishop Shantey Barnes

Signature: 

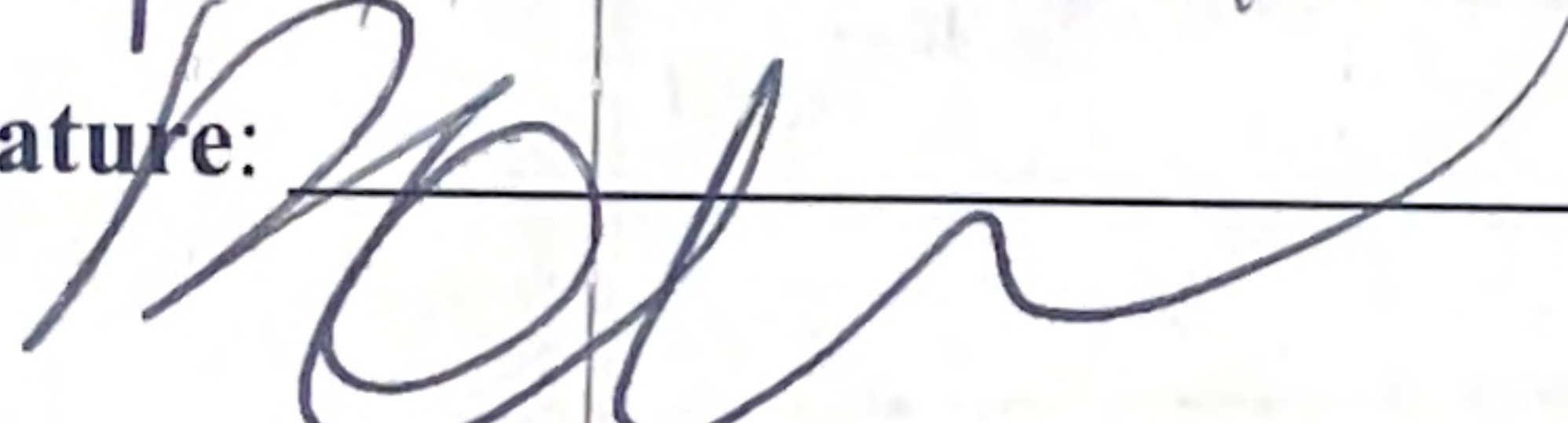
Name: Monique Mosee-king

Signature: 

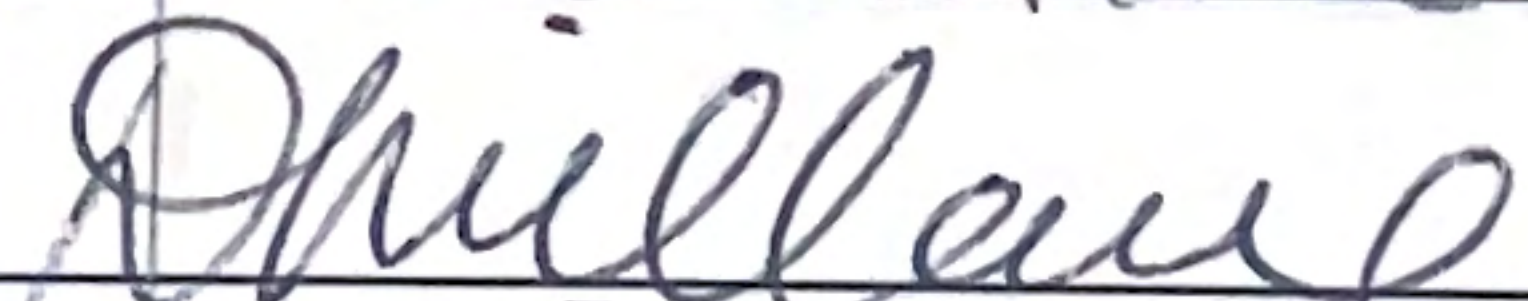
Name: Rebecca Villaseñor

Signature: 

Name: Britta Wahlstrom

Signature: 

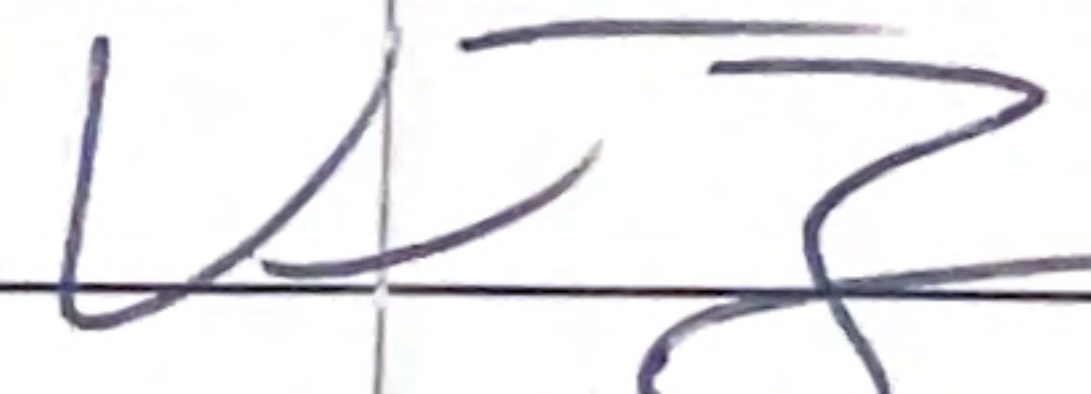
Name: Stephanie Millan

Signature: 

Name: Aruta Mitchem

Signature: 

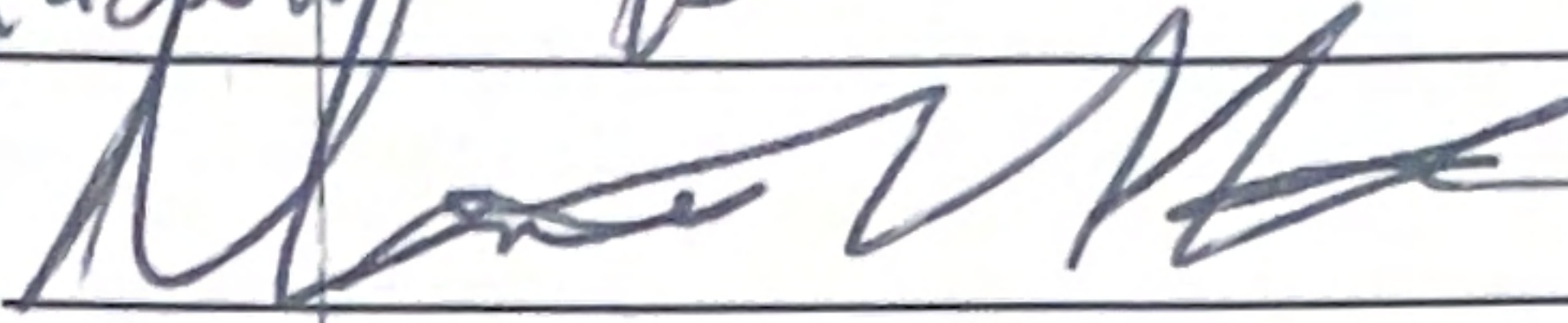
Name: Vincent Zepeda

Signature: 

**Necessary Signatures**

Necessary signatures pursuant to Education Code Section 47605(a):

Name: Madeline Kim

Signature: 

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

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