



Peak Prep Pleasant Valley

Board Meeting Agenda
Wednesday April 21st, 2021
4pm

Teleconference Locations:

Executive Order N-29-20 Waives or Revises Brown Act Requirements Temporarily.

Under this Executive Order, the following rules apply: Charter schools may hold public meetings via teleconferencing and make public meetings accessible telephonically or otherwise electronically to all members of the public seeking to observe and to address the local legislative body. Charter schools still need to comply with the timelines for posting agendas, including putting the agenda as a direct link on their website. The agenda must give notice of the means by which members of the public may observe and participate (e.g., conference call dial-in number, etc.). The agenda does not need to list the address from where each Board member will be calling in, agendas do not need to be posted at those locations, and the charter school does not need to make those locations accessible to the public or ensure that members of the public may address the body at those locations. A quorum of the Board does not need to participate from locations within the boundaries of the territory over which the charter school exercises jurisdiction. These changes only apply during the period in which state or local public health officials have imposed or recommended social distancing measures.

Join Zoom Meeting

<https://us02web.zoom.us/j/86200670689?pwd=M3BGQ2VhY3BiVHlCNGt5bW9vdWgydz09>

Meeting ID: 862 0067 0689

Passcode: Uykn8x

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Find your local number: <https://us02web.zoom.us/j/kd6S3L2ugm>

This legislative body conducts business under the meeting requirements of the Ralph M. Brown Act.

MEETING AGENDA & RELATED MATERIALS

Agendas for regular board meetings as defined by the Brown Act will be posted physically within the Charter School's jurisdiction, and on the legislative body's website 72 hours prior to the start of the meeting. Agendas for special meetings as defined by the Brown Act will be posted physically within the Charter School's jurisdiction, and on the legislative body's website 24 hours prior to the start of the meeting. Materials relating to an agenda topic that is a matter of public record in open session, will be made available for public.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting may request assistance by contact Superintendent, Dr. Shalen Bishop at Shalen.Bishop@peak-prep.org

FOR MORE INFORMATION

For more information concerning this agenda or for materials relating to this meeting, please contact the Head of School's Office: Dr. Shalen Bishop at Shalen.Bishop@peak-prep.org.

I. PRELIMINARY MATTERS

A. Call to Order:

Meeting was called to order by Board Director at: _____

B. Roll Call

Board Member	Present	Absent
Marlo Hartsuyker		
Natalie Adams		
Sandra Taylor		

C. Motion to adopt the agenda was moved by _____

Roll Call Vote:

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

II. PUBLIC COMMENT The public may comment on any item that is on the agenda or any other item that is in the Board's jurisdiction. No presentation shall be more than five (5) minutes and the total time for this purpose shall not exceed thirty (30) minutes. Individuals desiring to address the Board are requested to email Dr. Bishop (Shalen.Bishop@peak-prep.org) prior to the start of the meeting. Board members are prohibited from responding to or commenting on matters raised by the public that are not on the agenda. (Gov. Code § 54954.2(a))

III. Information, Discussion and Action items

A) Approval of Consent Agenda. Agenda items presented in this section compose the Consent Agenda and are routine of nature. Unless an item is moved to the Action section at the request of a board member, they will be approved by the board as a group as the first action on the agenda. Each item approved shall be deemed to have been read in full and adopted as recommended.

1. Approval of Financial Statement. The Chief Business Official recommends that the Board of Directors approve the revenue and expenditures as listed on the March 1st, 2021 through March 31st, 2021 Financial Statements.

2. Approval of Board Report of Commercial Checks

The Chief Business Official recommends that the Board of Directors approve the commercial payments as listed on the March 1st, 2021 through March 31st 2021 Board Report of Checks.

3. Approval of Board Report of Purchase Orders

The Chief Business Official recommends that the Board of Directors approve the purchase orders as listed on the March 1st, 2021 through March 31st, 2021 Board Reports.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

4. Approve Minutes from ³~~4~~/17/2021 Board Meeting.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

B) Superintendent Report (No Action, just reporting out different aspects of the school program)

- a. Highlights
- b. Programs/Academic Resources updates, if any.
- c. Upcoming Compliance Dates

C) The Board will review and consider the approval of the SPSA (School Plan for Student Achievement). The ESSA Requires schools that receive Title I funds and operating a school wide program (SWP) to develop a school plan.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

D) The Board will review and consider the approval of the Family Engagement Plan. Aligned with Title I funding, board shall adopt and implement a policy on parent and family engagement.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

- E. The Board will review and consider marketing options for the 2021-2022 school year.** Peak is looking at multiple marketing options for advertising and marketing.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

- F. The Board will review and consider the approval of the 2021-2022 Health Benefits for staff.** Annually, BSA and the Board will review and provide an update of benefits prior to open enrollment.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

- G. The Board will review and consider the approval of the renewal of CLA Auditors.** Peak Prep continues to use the auditors, CliftonLarsen Auditors, that also serve the school district. Annually, Peak must renew it's agreement with CLA.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

- H. The Board will review and consider the approval of an additional new Board Member.** We have a Peak Prep parent being considered for the Board. This would make it a board of 4.

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

IV. Closed Session

Conference with Legal Counsel – Existing Litigation (Gov. Code Section 54956.9(d)(1): One matter—Accel Online California, LLC v. Peak Prep Pleasant Valley

V. Board Members Remarks and Announcements

VI. ADJOURNMENT

MOTION FOR ADJOURNMENT Motion to Adjourn

Roll Call Vote:

Board Member	Motion to Move	Second	Yes	No	Abstain	Absent
Marlo Hartsuyker						
Natalie Adams						
Sandra Taylor						

Adjourned at:

Checks Dated 03/01/2021 through 03/31/2021

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
5038800105	03/08/2021	White, Ariel A	620-5200		112.88
5038800106	03/08/2021	T-Mobil USA Inc	620-5902		53.30
5038800107	03/11/2021	Bishop, Shalen	620-4300	997.03	
			620-5901	746.91	1,743.94
5038800108	03/15/2021	ALLTECH ENTERPRISES, LLC	620-5800		400.00
5038800109	03/15/2021	Fireplace Inc	620-5800		1,500.00
5038800110	03/15/2021	PLEASANT VALLEY SCHOOL DIST	620-5600		1,183.50
5038800111	03/22/2021	CliftonLarsonAllen LLP	620-5801		682.50
5038800112	03/22/2021	Oxford Consulting Services Inc	620-5800		4,115.00
5038800113	03/22/2021	Specalized Therapy Services	620-5800		323.75
5038800114	03/22/2021	Teacher Synergy LLC	620-5800		6,100.00
5038800115	03/24/2021	The Lincoln National Life Insurance Company	620-9539		560.30
5038800116	03/24/2021	Yarjianian & Associates P.Corp	620-5899		1,000.00
5038800117	03/29/2021	Kaiser Foundation Health Plan	620-9534		1,456.03
Total Number of Checks			13		19,231.20

Fund Recap

Fund	Description	Check Count	Expensed Amount
620	Peak Prep	13	19,231.20
	Total Number of Checks	13	19,231.20
	Less Unpaid Tax Liability		.00
	Net (Check Amount)		19,231.20

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

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Page 1 of 1

Fund 620 - Peak Prep

Fiscal Year 2020/21 Through April 2021

Object	Description	Adopted Budget	Revised Budget	Revenue	Balance	% Rcvd
Revenue Detail						
LCFF Revenue Sources						
8011	Revenue Limit State Aid Curr	1,955,786.00	1,914,761.00	1,211,416.00	703,345.00	63.27
8012	Education Protection Act	58,136.00	58,136.00	43,594.00	14,542.00	74.99
8019	Revenue Limit State Aid Prior			41,305.00-	41,305.00	NO BDGT
8096	Trs In-Lieu from Property Tax	1,031,670.00	1,031,670.00	639,675.00	391,995.00	62.00
Total LCFF Revenue Sources		3,045,592.00	3,004,567.00	1,853,380.00	1,151,187.00	61.69
Federal Revenue						
8181	Special Education Entitlement	50,000.00	50,000.00		50,000.00	
8290	All Other Federal Revenue	41,242.00	21,144.00	21,144.00		100.00
Total Federal Revenue		91,242.00	71,144.00	21,144.00	50,000.00	29.72
Other State Revenues						
8550	Mandated Cost Reimbursements	10,206.00	10,206.00	10,205.00	1.00	99.99
8560	State Lottery Grant	86,423.00	72,955.00	89,874.57	16,919.57-	123.19
8590	Other State		25,956.00	25,956.00		100.00
Total Other State Revenues		96,629.00	109,117.00	126,035.57	16,918.57-	115.50
Other Local Revenue						
8660	Interest		5,000.00	4,453.28	546.72	89.07
8699	All Other Local Revenue		1,302.00	1,301.70	.30	99.98
8792	Transfers of Apportionments Fr	120,000.00	120,000.00		120,000.00	
Total Other Local Revenue		120,000.00	126,302.00	5,754.98	120,547.02	4.56
Total Year To Date Revenues		3,353,463.00	3,311,130.00	2,006,314.55	1,304,815.45	60.59

Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
Expenditure Detail							
Certificated Salaries							
1100	Teacher	1,501,406.00	1,457,460.00	354,667.75	997,770.82	105,021.43	68.46
1110	Substitute Teacher				4,170.00	4,170.00-	NO BDGT
1130	Certificated Stipends	42,500.00	42,500.00	10,000.00	10,000.00	22,500.00	23.53
1200	Certificated Pupil Support Sal	105,000.00	93,974.00	26,718.10	57,593.67	9,662.23	61.29
1300	Certificated Administrators	260,001.00	260,001.00	64,554.44	184,904.21	10,542.35	71.12
1330	Administration Stipend	2,500.00	2,500.00	2,500.00			
1900	Other Certificated Salaries	18,000.00	18,000.00		9,270.00	8,730.00	51.50
Total Certificated Salaries		1,929,407.00	1,874,435.00	458,440.29	1,263,708.70	152,286.01	67.42
Classified Salaries							

Selection Grouped by Account Type - Sorted by Org, Fund, Object, Filtered by (Org = 638, Starting Period = 1, Ending Account Period = 0, Stmt Option? = , Zero Amounts? = N, SACS? = N, Restricted? = Y)

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Page 1 of 4

Fund 620 - Peak Prep

Fiscal Year 2020/21 Through April 2021

Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
Expenditure Detail (continued)							
Classified Salaries (continued)							
2400	Clerical & Office Salaries	45,931.00	57,899.00	11,199.31	36,267.79	10,431.90	62.64
Total Classified Salaries		45,931.00	57,899.00	11,199.31	36,267.79	10,431.90	62.64
Employee Benefits							
3301	OASDI/Medicare Certificated	146,216.00	135,900.00	34,305.22	90,774.14	10,820.64	66.79
3302	OASDI/Medicare Classified	3,514.00	4,359.00	849.32	2,711.40	798.28	62.20
3401	Health/Dental/Vision Cert	154,479.00	169,480.00		125,365.47	44,114.53	73.97
3402	Health/Dental/Vission Class	4,720.00	4,720.00		3,540.31	1,179.69	75.01
3501	SUI Certificated	965.00	892.00	224.32	593.26	74.42	66.51
3502	SUI Classified	23.00	28.00	5.54	17.73	4.73	63.32
3601	Workers' Comp Certificated	31,063.00	29,108.00	7,380.87	19,414.27	2,312.86	66.70
3602	Workers' Comp Classified	739.00	900.00	180.36	554.00	165.64	61.56
3901	403B and OtherBenCert		4,647.00		3,444.63	1,202.37	74.13
Total Employee Benefits		341,719.00	350,034.00	42,945.63	246,415.21	60,673.16	70.40
Books and Supplies							
4100	Textbooks	310,261.00	310,261.00		273,037.80	37,223.20	88.00
4300	Materials and Supplies	45,000.00	45,000.00		27,012.58	17,987.42	60.03
4400	Non-Capitalized Equipment				1,863.28	1,863.28-	NO BDGT
Total Books and Supplies		355,261.00	355,261.00	.00	301,913.66	53,347.34	84.98
Services and Other Operating Expenditures							
5200	Travel and Conference	5,000.00	5,000.00		112.88	4,887.12	2.26
5210	Mileage				579.60	579.60-	NO BDGT
5220	Staff Development	14,000.00	14,000.00		3,749.48	10,250.52	26.78
5300	Dues and Memberships	3,000.00	3,000.00		385.00	2,615.00	12.83
5450	Other Insurance	13,533.00	13,533.00		13,533.00		100.00
5600	Repair, Maintenance Building	18,000.00	18,000.00	1,183.50	11,691.50	5,125.00	64.95
5800	Professional/Consultion Servic	162,718.00	162,308.00	27,016.75	90,979.40	44,311.85	56.05
5801	Audit Services	13,050.00	13,050.00		5,302.50	7,747.50	40.63
5803	Business Services Authority	226,359.00	263,514.00		40,437.50	223,076.50	15.35
5899	Legal Services Box 14	100,000.00	100,000.00		18,118.50	81,881.50	18.12
5901	Communication Services-Phone				3,099.64	3,099.64-	NO BDGT
5902	Internet Services		400.00		461.30	61.30-	115.33
5903	Postage	900.00	900.00		558.59	341.41	62.07
Total Services and Other Operating Expenditures		556,560.00	593,705.00	28,200.25	189,008.89	376,495.86	31.84
Total Year To Date Expenditures		3,228,878.00	3,231,334.00	540,785.48	2,037,314.25	653,234.27	63.05

Selection Grouped by Account Type - Sorted by Org, Fund, Object, Filtered by (Org = 638, Starting Period = 1, Ending Account Period = 0, Stmt Option? = ,
Zero Amounts? = N, SACS? = N, Restricted? = Y)

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Page 2 of 4

Fund 620 - Peak Prep

Fiscal Year 2020/21 Through April 2021

Object	Description	Beginning Balance	Year to Date Activity	Ending Balance
Fund Reconciliation				
Assets				
9110	Cash in County Treasury		1,818,368.81	1,818,368.81
9200	Accounts Receivable		1,261,735.24-	1,261,735.24-
9201	Accounts Receivable-Payroll		2,751.85	2,751.85
9290	Due From Other Governments		607,113.00-	607,113.00-
Total Assets		.00	47,727.58-	47,727.58-
Liabilities				
9510	Accounts Payable		116,014.51-	116,014.51-
9530	Summer Pay Liability		2,607.22	2,607.22
9534	Health & Welfare Ins Payable		60,696.52	60,696.52
9535	State Unemployment Insurance		200.65	200.65
9536	Workers' Comp Ins Payable		2,783.40-	2,783.40-
9539	Miscellaneous Deductions		3,626.64	3,626.64
9590	Due to Other Governments		34,939.00	34,939.00
Total Liabilities		.00	16,727.88-	16,727.88-
Calculated Fund Balance		.00	30,999.70-	30,999.70-
Beginning Fund Balance				
9791	Beginning Fund Balance			
Beginning Fund Balance Proof		.00	30,999.70-	30,999.70-
Change in Fund Balance - Excess Revenues (Expenditures)			(30,999.70)	

Memo Only - Ending Fund Balance Accounts

	Adopted	Revised
Reserves		
9720 Reserve for Encumbrances		540,785.48
Other Designations		
9790 Undesignated/Unappropriated	10,206.00	1,464,651.00
9796 - 9799		
9796 Capital Assets Net of Debt	114,379.00	161,567.00

Fund 620 - Peak Prep

Fiscal Year 2020/21 Through April 2021

Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Budget Balance	% of Budget
Revenues, Expenditures, and Changes in Fund Balance						
A. Revenues	3,353,463.00	3,311,130.00		2,006,314.55	1,304,815.45	60.59
B. Expenditures	3,228,878.00	3,231,334.00	540,785.48	2,037,314.25	653,234.27	63.05
C. Subtotal (Revenue LESS Expense)	124,585.00	79,796.00		30,999.70-	651,581.18	
D. Other Financing Sources and Uses						
Sources						
LESS Uses						
E. Net Change in Fund Balance	124,585.00	79,796.00		30,999.70-	651,581.18	
F. Fund Balance:						
Beginning Balance (9791)		1,546,422.00				
Audit Adjustments (9793)						
Other Restatements (9795)						
Adjusted Beginning Balance	.00	1,546,422.00		.00		
G. Calculated Ending Balance	124,585.00	1,626,218.00		30,999.70-		
*Components of Ending Fund Balance						
Legally Restricted (9740)						
Other Designations (9780)						
Undesig/Unapprop (9790)	10,206.00	1,464,651.00				
Other	114,379.00	161,567.00		540,785.48		

Includes Purchase Orders dated 03/01/2021 - 03/31/2021

PO Number	Vendor Name	Order Location	Object Description	Resource Description	Account Amount
B3821-00023	Yarjianian & Associates P.Corp	Peak Prep	LglSrvcsBx14	Unrestricted	1,000.00
P3821-00031	Teacher Synergy LLC	Peak Prep	Prof/ConslServ	Unrestricted	6,100.00
P3821-00032	Fireplace Inc	Peak Prep	Prof/ConslServ	Unrestricted	1,500.00
P3821-00033	ALLTECH ENTERPRISES, LLC	Peak Prep	Prof/ConslServ	Unrestricted	4,550.00
P3821-00034	Haynes Family of Programs S.T. A.R Academy	Peak Prep	Prof/ConslServ	Unrestricted	1,500.00
P3821-00035	ALLTECH ENTERPRISES, LLC	Peak Prep	NoCptlzdEquip	Unrestricted	931.64
		Total Number of POs	6	Total	15,581.64

Fund Recap

Fund	Description	PO Count	Amount
620	Peak Prep	6	15,581.64

PO Changes

	New PO Amount	Fund/ Object	Description	Change Amount
B3821-00019	601.25	620-5800	Peak Prep/Prof/ConslServ	256.25
Total PO Changes				256.25

The preceding Purchase Orders have been issued in accordance with the District's Purchasing Policy and authorization of the Board of Trustees. It is recommended that the preceding Purchase Orders be approved and that payment be authorized upon delivery and acceptance of the items ordered.

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Page 1 of 1

School Plan for Student Achievement

Peak Prep Pleasant Valley

School Name	County-District-School (CDS) Code	Schoolsite Council (SSC) Approval Date	Local Board Approval Date
Peak Prep Pleasant Valley	56-72553-0139592	4/16/2021	4/21/2021

General Information

Peak Prep is a non-classroom based school that serves their students 100% virtually. We have an enrollment of 435, 389 General Ed students 46 Special Education students, 101 Free/Reduced Lunch students, 10 McKinney-Vento students, 3 Foster Youth students and 0 EL students.

Peak Prep educates students from three counties including Ventura, Kern, Santa Barbara and Los Angeles Counties.

We've continued to stay open since the Governor's Executive order. There has been a minimal impact on the day-to-day operations and experiences for our families. There was a financial impact due to the limitation on ADA claimed. As a result of staying open, we increase our enrollment by 150 students. As a public school, we must accept our students and serve them well. We have hired additional staff to meet the needs of the additional enrollments and still serve all students, including our students with a unique need. After we enrolled students and hired the needed staff, we were informed by the state of the changes in the ADA claim.

Peak Prep Pleasant Valley has planned its budget for the 2020-2021 school year to accommodate the growth and support for all students.

Stakeholder Involvement

How, when, and with whom did the school consult as part of the planning process for this SPSA/Annual Review and Update?

Involvement Process for the SPSA and Annual Review and Update

Peak Prep offers stakeholder engagement through meetings, surveys, emails and received phone calls. As a result of the COVID-19 Pandemic, we initiated engagement opportunities with our families and community. We do not have a bargaining unit. Stakeholder Engagement included:

We presented a number of opportunities to staff for feedback.

We have reached out to all students to give them an opportunity for feedback.

We have reached out to our parents/guardians early summer and late August to give them an opportunity for feedback. In addition, the survey is still open.

In addition, we've participated in multiple Ventura County and SELPA meetings that included Foster Youth & The LCAP, English Learners & The LCAP, and SELPA Consultation & strengthening services for students with disabilities.

Peak Prep met with the Parent Advisory Committee and held a public hearing. All meetings for feedback were held virtually, via Zoom. Peak prep continues to offer office hours for phone calls, receipt of emails, and options to complete surveys.

Lastly, we have a site council reviewing and participating in the engagement, planning and executing process.

There was a survey given to families, students and faculty. The summary is below:

Students:

The majority of students felt supported by their teacher.

The majority of students felt their homeroom teacher cared about them and their learning

The majority of students felt like this was the right environment for them.

The main areas of improvement that were common were more tutoring opportunities, in person field trips, and a bigger variety of elective courses.

Parents:

There was an overall satisfied rate of 4.5 out of 5

The majority of guardians felt their voices were heard.

There was a lot of positive feedback on homeroom teachers and teacher communication and support.

The main areas of improvement were common were more tutoring opportunities, parent resources/support, and all classes at one time.

Teachers:

There were a 100% satisfaction and return rate

They were all excited to return to school

The main areas of improvement were for courses to be spread out. More opportunities for team meetings and participation and better SIS.

Annual Review/Update—N/A (This is the first and only SPSA, we are moving towards LCAP.

Resource Inequities

Briefly identify and describe any resource inequities identified as a result of the required needs assessment, as applicable.

N/A—We are a School Wide Program; therefore, this box doesn't apply to us.

Goals, Strategies, Expenditures, & Annual Review

Goal 1

Increase Supports for Pupils with Unique needs.

Identified Need

We are encountering students with learning loss due to the pandemic. In addition, students with unique needs already demonstrate a higher need.

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome	Expected Outcome
ELPAC Assessment	N/A—We are in year one of SPSA	80% yearly growth
MAP Assessment	N/A—We are in year one of SPSA	80% yearly growth
Student/Family Survey	[Add baseline here]	Average satisfaction rate between 4-5

Strategy/Activity 1

Students to be Served by this Strategy/Activity

(Identify either All Students or one or more specific student groups)

- 1) English Language Learners
- 2) Foster Care Youth
- 3) Homeless Youth
- 4) Gifted Students
- 5) Students with learning disabilities

Strategy/Activity

We provide a variety of additional support to assist our pupils with unique needs.

EL Support:

- 1) Raz Kids (comprehensive reading resource) and Raz Kids EL
- 2) Translation in the curriculum with multiple language options
- 3) Provide multiple exposures to vocabulary. Research indicates that "front-loading" or pre-teaching vocabulary before a lesson helps make content more accessible to students.

4) Higher-order thinking skills such as analysis, evaluation, and application are embedded throughout each course.

5) Provide explicit instruction

6) CTE Pathways.

7) Intervention Hours held by Teachers

8) ILP (Individual Learning Plans) aligned with MAP

Foster Care:

1) Social-Emotional Learning courses

2) Access to counselors

3) Access to full curriculum and technology

4) Continuity, they can continue to work with Peak, even if there is a change at home.

5) CTE Pathways

6) ILP (Individual Learning Plans) aligned with MAP

Homelessness

1) School Liaison

2) Continuity

3) Social-Emotional Learning courses

4) Access to counselors

5) Access to a full curriculum, technology, and CTE Pathways

6) ILP (Individual Learning Plans) aligned with MAP

Gifted Students

1) Access to honors and AP

2) Dual Enrollment

3) CTE Pathways

4) ILP (Individual Learning Plans) aligned with MAP

Special Education

1) Embedded tools to provide read-aloud support, transcripts and captions, definitions, and highlighting to help students access and organize the content.

2) Enotes tool to help students synthesize information and record questions and observations in a digital notebook

3) Course customization tools for faculty to enable them to modify the curriculum to meet student's needs.

4) Guided Notes and printable worksheets to allow for a more active role and reduce cognitive load while working through lessons.

- 5) Direct Instruction
- 6) CTE Pathways.
- 7) ILP (Individual Learning Plans) aligned with MAP

Although these are some examples of supports that were implemented for our students with unique needs, all students can benefit from them and have access, if needed. In addition, we use RTI as well.

We track and measure through various means. For example: SELPA online tool, SIRAS, progress reports, counselors, online curriculum, online pacing guides, IEP meetings, homeroom teacher support, family login and support, student's support team, collaboration time (team meetings), PLC meetings, LMS reports, and data analysis reporting.

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)	Source(s)
\$10,000	LCFF 4100: Curriculum CTE Pathways—additional elective courses that provide career and technical experience and training.
\$25,000	Federal CARES Act (3220) LCFF 4100: Curriculum My Pathways –a supplemental resource to pinpoint academic learning gaps and provide students with instruction and tools to fill those gaps.
\$6,500	LCFF 4100: Curriculum A curriculum that allows more visuals, pre-tests, and provides instructional tools that will support all students (Note-taking, transcript scribe, translation, etc.).

Amount(s)

Source(s)

\$114,776

State CARES Act (7420)
State/Federal Special Ed (3310/6500)
LCFF
1200/3XXX: Certificated salaries and benefits
Psychologist and Counselor—Additional staff to
provide alternative support beyond the
academics.

Annual Review

SPSA Year Reviewed: 2021-2022

Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal, an analysis is not required and this section may be deleted.

ANALYSIS

Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.

N/A—In first year of goal

Briefly describe any major differences between the intended implementation and/or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.

N/A—In first year of goal

Describe any changes that will be made to this goal, the annual outcomes, metrics, or strategies/activities to achieve this goal as a result of this analysis. Identify where those changes can be found in the SPSA.

N/A—In first year of goal

Goal 2

All students

Identified Need

Address pupil-learning loss

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome	Expected Outcome
MAP/Iready Diagnostics	Spring 2021 scores/NA	80% yearly growth amongst students
Grades	Semester grades 2021/N/A	80% pass rate
Graduation Rate	Calpads Grad Rate	80% graduation rate

Strategy/Activity 1

Students to be Served by this Strategy/Activity

(Identify either All Students or one or more specific student groups)

Strategy/Activity

There are multiple ways we address pupil-learning loss for all our students.

- 1) Through our MyPath intervention program. This supports gaps in reading and mathematics. We will continue to measure through the program.
- 2) MAP and I-ready Diagnostics. It's a personalized diagnostic that pinpoints learning gaps in mathematics, reading and language usage. In addition, it helps drive an individual learning plan. Students will take the diagnostic multiple times throughout the year to reassess and show potential growth.
- 3) We have pretests in our courses that allow for us to know what content that needs additional teaching and allows for gifted students to move forward.
- 4) There are K-5 supplemental resources that support learning loss as well: Raz Kids and IXL. These standard-based resources allow for a measurement of knowledge while providing an individualized plan for students.
- 5) We also have counselors and homeroom teachers that will monitor student progress throughout the year.
- 6) In addition, we have our SST and Reclassification processes in place.

1. Peak uses supplemental resources to measure academic progress like Raz kids, IXL, I-ready, MAP. These resources are designed to provide additional support in filling learning gaps.
2. Peak has and will provide staff professional development and training opportunities to use these resources and how to drive further instruction.
3. Each student is provided with a homeroom teacher to follow up with families, students, and school teams on academic progress.

4. MyPath is an online learning intervention program for middle and high school students that offers data-driven differential instruction in math and ELA.
5. MAP (Measure of academic progress) is an online diagnostic that pinpoints learning gaps. The assessment will provide prescriptive learning paths, personalized instruction for intervention, remediation and enrichment opportunities, and monitor progress.
6. Pathblazer is a K-8 personalized intervention program that provides supplemental instruction and content to help build foundational skills in math and ELA while providing data and targeted instruction for teachers.
7. We will address learning loss and accelerate learning progress through Edgenuity MyPath and Pathblazer. MyPath is an intervention program for middle and high school students that offers data-driven differentiated instruction in both math and ELA. We will use the data and reporting features to monitor student progress and provide intervention or acceleration when needed. Through MyPath, we are able to pinpoint gaps, provide personalized instruction, and monitor progress. Pathblazer is our intervention program for grades K-5. This program provides supplemental instruction that builds on foundational skills. The testing functionality allows us to identify where students are struggling and provide the targeted instruction needed to close the learning gaps. We will accelerate learning by providing supplemental assignments and more challenging coursework. These strategies and actions can serve all students.

Multiple areas will measure effectiveness:

- 1) Increased engagement (attendance, submitting work, progressing academically).
- 2) Increased scores on diagnostic assessments throughout the year
- 3) Increased credits in high school.
- 4) Increased communication amongst teachers and families.
- 5) MAP and I-ready dynamic reports on student progress

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)	Source(s)
\$6,990	LCFF 5800: Professional/Consulting Services And Operating Expenditures Social Emotional Learning Courses
\$1,320	LCFF 4100: Curriculum I-ready –A diagnostic assessment and tool that provides TK-5 students individualized instruction based on each one's unique needs

Amount(s)	Source(s)
\$1,500	LCFF 4100: Curriculum Raz Kids and Raz Kids ELL-- provides comprehensive leveled reading resources for students
\$7,000	LCFF 4100: Curriculum Measure of Academic Progress (MAP) - A diagnostic assessment and tool that provides 6-12 students individualized instruction based on each one's unique needs
\$1,446,172	LCFF Title I, Part A (for extra math teacher) State CARES Act (7420) State/Federal Special Education (3310/6500) 1200/3XXX: Certificated salaries and benefits Homeroom Teacher, Counselor, and Psychologist support—Allows for additional academic, emotional, and social support for individual students.
\$3,300	LCFF 4100: Curriculum IXL—is a learning resource to help students master skills at their own pace through fun and interactive challenges.

Annual Review

SPSA Year Reviewed: 2021-2022

Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal, an analysis is not required and this section may be deleted.

ANALYSIS

Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.

N/A—In first year of goal

Briefly describe any major differences between the intended implementation and/or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.

N/A—In first year of goal

Describe any changes that will be made to this goal, the annual outcomes, metrics, or strategies/activities to achieve this goal as a result of this analysis. Identify where those changes can be found in the SPSA.

N/A—In first year of goal

Goal 3

Address Mental Health and Social and Emotional Well-Being

Identified Need

There has been a higher level need for social emotional support. Social emotional support has a correlation with academic achievement.

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome	Expected Outcome
Social Emotional Courses	Spring 2020 offerings	Increase in Social Emotional Learning courses
School Psychologist & Counselor	Spring 2020 hours	Increase School Psychologist hours and widen access to counselors.
Homeroom Teachers	Spring 2020 ratio	Ratio of 25:1 HR teacher classroom

Complete a copy of the Strategy/Activity table for each of the school's strategies/activities. Duplicate the table, including Proposed Expenditures, as needed.

Strategy/Activity 1

Students to be Served by this Strategy/Activity

(Identify either All Students or one or more specific student groups)

Strategy/Activity

Peak has and will provide multiple avenues to support mental health and social and emotional well-being by:

- 1) Provide Social Emotional Learning courses. All students have access.
- 2) Provide all students with a homeroom teacher that helps support, monitor, and track students.

- 3) Provide all students with access to the school Psychologist and Counselor
- 4) Provide professional development for faculty regarding mandated reporting, human trafficking, McKinney-Vento, SEL courses, suicide prevention, and more for teachers.

Peak monitors students through the students' team members: Homeroom teacher, Sped Teacher, McKinney-Vento Liaison, Counselor, and content teacher.

In addition, we will partner with our families

As a non-classroom based school, we have an independent study and missed assignment school policy. Along with the Master Agreement, this addresses the procedure and steps taken when a student is missing assignments and not engaged.

Peak outreaches and engages pupil and families in their native language by:

- 1) Weekly progress reports emailed to guardians and student.
- 2) The ability for guardians to monitor attendance and student progress 24/7
- 3) Weekly newsletter from the Principal
- 4) Re-engagement calls, texts, and emails from administrators, content teachers, and homeroom teachers.
- 5) Mandatory meetings for students that are academically at-risk and/or not engaged
- 6) SEL Courses that are designed for re-engagement

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)	Source(s)
\$6,990	LCFF 5800: Professional/Consulting Services And Operating Expenditures Social Emotional Learning Courses: It provides a variety of supplemental social and emotional support for students who may need additional support.

Amount(s)	Source(s)
114,776	State CARES Act (7420) State/Federal Special Ed (3310/6500) LCFF 1200/3XXX: Certificated salaries and benefits Psychologist and Counselor—Additional staff to provide alternative support beyond the academics.

Annual Review

SPSA Year Reviewed: 2021-2022

Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal, an analysis is not required and this section may be deleted.

ANALYSIS

Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.

N/A—In first year of goal

Briefly describe any major differences between the intended implementation and/or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.

N/A—In first year of goal

Describe any changes that will be made to this goal, the annual outcomes, metrics, or strategies/activities to achieve this goal as a result of this analysis. Identify where those changes can be found in the SPSA.

N/A—In first year of goal

Budget Summary

Complete the table below. Schools may include additional information. Adjust the table as needed. The Budget Summary is required for schools funded through the ConApp, and/or that receive funds from the LEA for Comprehensive Support and Improvement (CSI).

Budget Summary

DESCRIPTION

AMOUNT

Total Funds Provided to the School Through the Consolidated Application

\$ 79,586

Total Federal Funds Provided to the School from the LEA for CSI

\$ 0

Total Funds Budgeted for Strategies to Meet the Goals in the SPSA

\$ 1,737,334

Other Federal, State, and Local Funds

List the additional Federal programs that the school is including in the schoolwide program. Adjust the table as needed. If the school is not operating a Title I schoolwide program this section is not applicable and may be deleted.

Federal Programs	Allocation (\$)
Title I, Part A	\$68,702
Federal Special Ed, IDEA Part B (Estimate)	\$50,000
Federal CARES Act (3220)	\$21,144

Subtotal of additional federal funds included for this school: \$ 139,846

List the State and local programs that the school is including in the schoolwide program. Duplicate the table as needed.

State or Local Programs	Allocation (\$)
LCFF	\$2,103,197
State CARES Act (7420)	\$25,956
State Special Ed, AB 602 (Estimate)	\$120,000

Subtotal of state or local funds included for this school: \$ 2,249,153

Total of federal, state, and/or local funds for this school: \$2,388,999

Instructions

The School Plan for Student Achievement (SPSA) is a strategic plan that maximizes the resources available to the school while minimizing duplication of effort with the ultimate goal of increasing student achievement. SPSA development should be aligned with and inform the Local Control and Accountability Plan process.

The SPSA consolidates all school-level planning efforts into one plan for programs funded through the consolidated application (ConApp), and for federal school improvement programs, including schoolwide programs, Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), and Additional Targeted Support and Improvement (ATSI), pursuant to California *Education Code (EC)* Section 64001 and the Elementary and Secondary Education Act as amended by the Every Student Succeeds Act (ESSA). This template is designed to meet schoolwide program planning requirements. It also notes how to meet CSI, TSI, or ATSI requirements, as applicable.

California's ESSA State Plan supports the state's approach to improving student group performance through the utilization of federal resources. Schools use the SPSA to document their approach to maximizing the impact of federal investments in support of underserved students. The implementation of ESSA in California presents an opportunity for schools to innovate with their federally-funded programs and align them with the priority goals of the school and the LEA that are being realized under the state's Local Control Funding Formula (LCFF).

The LCFF provides schools and LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The SPSA planning process supports continuous cycles of action, reflection, and improvement. Consistent with *EC* 65001, the Schoolsite Council (SSC) is required to develop and annually review the SPSA, establish an annual budget, and make modifications to the plan that reflect changing needs and priorities, as applicable.

For questions related to specific sections of the template, please see instructions below:

Instructions: Table of Contents

The SPSA template meets the requirements of schoolwide planning (SWP). Each section also contains a notation of how to meet CSI, TSI, or ATSI requirements.

[Stakeholder Involvement](#)

[Goals, Strategies, & Proposed Expenditures](#)

[Planned Strategies/Activities](#)

[Annual Review and Update](#)

[Budget Summary](#)

[Appendix A: Plan Requirements for Title I Schoolwide Programs](#)

[Appendix B: Plan Requirements for Schools to Meet Federal School Improvement Planning Requirements](#)

[Appendix C: Select State and Federal Programs](#)

For additional questions or technical assistance related to LEA and school planning, please contact the Local Agency Systems Support Office, at LCFF@cde.ca.gov.

For programmatic or policy questions regarding Title I schoolwide planning, please contact the local educational agency, or the CDE's Federal Programs and Reporting Office at TITLEI@cde.ca.gov.

For questions or technical assistance related to meeting federal school improvement planning requirements (for CSI, TSI, and ATSI), please contact the CDE's School Improvement and Support Office at SISO@cde.ca.gov.

Purpose and Description

Schools identified for Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), or Additional Targeted Support and Improvement (ATSI) must respond to the following prompts. A school that has not been identified for CSI, TSI, or ATSI may delete the Purpose and Description prompts.

Purpose

Briefly describe the purpose of this plan by selecting from Schoolwide Program, Comprehensive Support and Improvement, Targeted Support and Improvement, or Additional Targeted Support and Improvement)

Description

Briefly describe the school's plan for effectively meeting ESSA requirements in alignment with the Local Control and Accountability Plan and other federal, state, and local programs.

Stakeholder Involvement

Meaningful involvement of parents, students, and other stakeholders is critical to the development of the SPSA and the budget process. Schools must share the SPSA with school site-level advisory

groups, as applicable (e.g., English Learner Advisory committee, student advisory groups, tribes and tribal organizations present in the community, as appropriate, etc.) and seek input from these advisory groups in the development of the SPSA.

The Stakeholder Engagement process is an ongoing, annual process. Describe the process used to involve advisory committees, parents, students, school faculty and staff, and the community in the development of the SPSA and the annual review and update.

[This section meets the requirements for TSI and ATSI.]

[When completing this section for CSI, the LEA shall describe the process used to develop, in partnership with stakeholders, the CSI plan.]

Resource Inequities

Schools eligible for CSI or ATSI must identify resource inequities, which may include a review of LEA- and school-level budgeting as a part of the required needs assessment. Identified resource inequities must be addressed through implementation of the CSI or ATSI plan. Briefly identify and describe any resource inequities identified as a result of the required needs assessment and summarize how the identified resource inequities are addressed in the SPSA.

[This section meets the requirements for CSI and ATSI. If the school is not identified for CSI or ATSI this section is not applicable and may be deleted.]

Goals, Strategies, Expenditures, & Annual Review

In this section a school provides a description of the annual goals to be achieved by the school. This section also includes descriptions of the specific planned strategies/activities a school will take to meet the identified goals, and a description of the expenditures required to implement the specific strategies and activities.

Goal

State the goal. A goal is a broad statement that describes the desired result to which all strategies/activities are directed. A goal answers the question: What is the school seeking to achieve?

It can be helpful to use a framework for writing goals such as the S.M.A.R.T. approach. A S.M.A.R.T. goal is one that is **S**pecific, **M**asurable, **A**chievable, **R**ealistic, and **T**ime-bound. A level of specificity is needed in order to measure performance relative to the goal as well as to assess whether it is reasonably achievable. Including time constraints, such as milestone dates, ensures a realistic approach that supports student success.

A school may number the goals using the “Goal #” for ease of reference.

[When completing this section for CSI, TSI, and ATSI, improvement goals shall align to the goals, actions, and services in the LEA LCAP.]

Identified Need

Describe the basis for establishing the goal. The goal should be based upon an analysis of verifiable state data, including local and state indicator data from the California School Dashboard (Dashboard) and data from the School Accountability Report Card, including local data voluntarily collected by districts to measure pupil achievement.

[Completing this section fully addresses all relevant federal planning requirements]

Annual Measurable Outcomes

Identify the metric(s) and/or state indicator(s) that the school will use as a means of evaluating progress toward accomplishing the goal. A school may identify metrics for specific student groups. Include in the baseline column the most recent data associated with the metric or indicator available at the time of adoption of the SPSA. The most recent data associated with a metric or indicator includes data reported in the annual update of the SPSA. In the subsequent Expected Outcome column, identify the progress the school intends to make in the coming year.

[When completing this section for CSI the school must include school-level metrics related to the metrics that led to the school's identification.]

[When completing this section for TSI/ATSI the school must include metrics related to the specific student group(s) that led to the school's identification.]

Strategies/Activities

Describe the strategies and activities being provided to meet the described goal. A school may number the strategy/activity using the "Strategy/Activity #" for ease of reference.

Planned strategies/activities address the findings of the needs assessment consistent with state priorities and resource inequities, which may have been identified through a review of the local educational agency's budgeting, its local control and accountability plan, and school-level budgeting, if applicable.

[When completing this section for CSI, TSI, and ATSI, this plan shall include evidence-based interventions and align to the goals, actions, and services in the LEA LCAP.]

[When completing this section for CSI and ATSI, this plan shall address through implementation, identified resource inequities, which may have been identified through a review of LEA- and school-level budgeting.]

Students to be Served by this Strategy/Activity

Indicate in this box which students will benefit from the strategies/activities by indicating "All Students" or listing one or more specific student group(s) to be served.

[This section meets the requirements for CSI.]

[When completing this section for TSI and ATSI, at a minimum, the student groups to be served shall include the student groups that are consistently underperforming, for which the school received the TSI or ATSI designation. For TSI, a school may focus on all students or the student group(s) that led to identification based on the evidence-based interventions selected.]

Proposed Expenditures for this Strategy/Activity

For each strategy/activity, list the amount(s) and funding source(s) for the proposed expenditures for the school year to implement these strategies/activities. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal, identify the Title and Part, as applicable), Other State, and/or Local.

Proposed expenditures that are included more than once in a SPSA should be indicated as a duplicated expenditure and include a reference to the goal and strategy/activity where the expenditure first appears in the SPSA. Pursuant to Education Code, Section 64001(g)(3)(C), proposed expenditures, based on the projected resource allocation from the governing board or governing body of the LEA, to address the findings of the needs assessment consistent with the state priorities including identifying resource inequities which may include a review of the LEA's budgeting, its LCAP, and school-level budgeting, if applicable.

[This section meets the requirements for CSI, TSI, and ATSI.]

[NOTE: Federal funds for CSI shall not be used in schools identified for TSI or ATSI. In addition, funds for CSI shall not be used to hire additional permanent staff.]

Annual Review

In the following Analysis prompts, identify any material differences between what was planned and what actually occurred as well as significant changes in strategies/activities and/ or expenditures from the prior year. This annual review and analysis should be the basis for decision-making and updates to the plan.

Analysis

Using actual outcome data, including state indicator data from the Dashboard, analyze whether the planned strategies/activities were effective in achieving the goal. Respond to the prompts as instructed. Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal the Annual Review section is not required and this section may be deleted.

- Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.
- Briefly describe any major differences between either/or the intended implementation or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.
- Describe any changes that will be made to the goal, expected annual measurable outcomes, metrics/indicators, or strategies/activities to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard, as applicable. Identify where those changes can be found in the SPSA.

[When completing this section for CSI, TSI, or ATSI, any changes made to the goals, annual measurable outcomes, metrics/indicators, or strategies/activities, shall meet the CSI, TSI, or ATSI planning requirements. CSI, TSI, and ATSI planning requirements are listed under each section of the Instructions. For example, as a result of the Annual Review and Update, if changes are made to a goal(s), see the Goal section for CSI, TSI, and ATSI planning requirements.]

Budget Summary

In this section a school provides a brief summary of the funding allocated to the school through the ConApp and/or other funding sources as well as the total amount of funds for proposed expenditures described in the SPSA. The Budget Summary is required for schools funded through the ConApp and that receive federal funds for CSI. If the school is not operating a Title I schoolwide program this section is not applicable and may be deleted.

From its total allocation for CSI, the LEA may distribute funds across its schools that meet the criteria for CSI to support implementation of this plan. In addition, the LEA may retain a portion of its total allocation to support LEA-level expenditures that are directly related to serving schools eligible for CSI.

Budget Summary

A school receiving funds allocated through the ConApp should complete the Budget Summary as follows:

- Total Funds Provided to the School Through the Consolidated Application: This amount is the total amount of funding provided to the school through the ConApp for the school year. The school year means the fiscal year for which a SPSA is adopted or updated.
- Total Funds Budgeted for Strategies to Meet the Goals in the SPSA: This amount is the total of the proposed expenditures from all sources of funds associated with the strategies/activities reflected in the SPSA. To the extent strategies/activities and/or proposed expenditures are listed in the SPSA under more than one goal, the expenditures should be counted only once.

A school receiving federal funds for CSI should complete the Budget Summary as follows:

- Total Federal Funds Provided to the School from the LEA for CSI: This amount is the total amount of funding provided to the school from the LEA.

[NOTE: Federal funds for CSI shall not be used in schools eligible for TSI or ATSI. In addition, funds for CSI shall not be used to hire additional permanent staff.]

Appendix A: Plan Requirements

Schoolwide Program Requirements

This School Plan for Student Achievement (SPSA) template meets the requirements of a schoolwide program plan. The requirements below are for planning reference.

A school that operates a schoolwide program and receives funds allocated through the ConApp is required to develop a SPSA. The SPSA, including proposed expenditures of funds allocated to the school through the ConApp, must be reviewed annually and updated by the SSC. The content of a SPSA must be aligned with school goals for improving student achievement.

Requirements for Development of the Plan

- I. The development of the SPSA shall include both of the following actions:
 - A. Administration of a comprehensive needs assessment that forms the basis of the school's goals contained in the SPSA.
 1. The comprehensive needs assessment of the entire school shall:
 - a. Include an analysis of verifiable state data, consistent with all state priorities as noted in Sections 52060 and 52066, and informed by all indicators described in Section 1111(c)(4)(B) of the federal Every Student Succeeds Act, including pupil performance against state-determined long-term goals. The school may include data voluntarily developed by districts to measure pupil outcomes (described in the Identified Need); and
 - b. Be based on academic achievement information about all students in the school, including all groups under §200.13(b)(7) and migratory children as defined in section 1309(2) of the ESEA, relative to the State's academic standards under §200.1 to—
 - i. Help the school understand the subjects and skills for which teaching and learning need to be improved; and
 - ii. Identify the specific academic needs of students and groups of students who are not yet achieving the State's academic standards; and
 - iii. Assess the needs of the school relative to each of the components of the schoolwide program under §200.28.
 - iv. Develop the comprehensive needs assessment with the participation of individuals who will carry out the schoolwide program plan.
 - v. Document how it conducted the needs assessment, the results it obtained, and the conclusions it drew from those results.
 - B. Identification of the process for evaluating and monitoring the implementation of the SPSA and progress towards accomplishing the goals set forth in the SPSA (described in the Expected Annual Measurable Outcomes and Annual Review and Update).

Requirements for the Plan

- II. The SPSA shall include the following:

- A. Goals set to improve pupil outcomes, including addressing the needs of student groups as identified through the needs assessment.
- B. Evidence-based strategies, actions, or services (described in Strategies and Activities)
 - 1. A description of the strategies that the school will be implementing to address school needs, including a description of how such strategies will--
 - a. provide opportunities for all children including each of the subgroups of students to meet the challenging state academic standards
 - b. use methods and instructional strategies that:
 - i. strengthen the academic program in the school,
 - ii. increase the amount and quality of learning time, and
 - iii. provide an enriched and accelerated curriculum, which may include programs, activities, and courses necessary to provide a well-rounded education.
 - c. Address the needs of all children in the school, but particularly the needs of those at risk of not meeting the challenging State academic standards, so that all students demonstrate at least proficiency on the State's academic standards through activities which may include:
 - i. strategies to improve students' skills outside the academic subject areas;
 - ii. preparation for and awareness of opportunities for postsecondary education and the workforce;
 - iii. implementation of a schoolwide tiered model to prevent and address problem behavior;
 - iv. professional development and other activities for teachers, paraprofessionals, and other school personnel to improve instruction and use of data; and
 - v. strategies for assisting preschool children in the transition from early childhood education programs to local elementary school programs.
- C. Proposed expenditures, based on the projected resource allocation from the governing board or body of the local educational agency (may include funds allocated via the ConApp, federal funds for CSI, any other state or local funds allocated to the school), to address the findings of the needs assessment consistent with the state priorities, including identifying resource inequities, which may include a review of the LEAs budgeting, it's LCAP, and school-level budgeting, if applicable (described in Proposed Expenditures and Budget Summary). Employees of the schoolwide program may be deemed funded by a single cost objective.
- D. A description of how the school will determine if school needs have been met (described in the Expected Annual Measurable Outcomes and the Annual Review and Update).
 - 1. Annually evaluate the implementation of, and results achieved by, the schoolwide program, using data from the State's annual assessments and other indicators of academic achievement;
 - 2. Determine whether the schoolwide program has been effective in increasing the achievement of students in meeting the State's academic standards, particularly for those students who had been furthest from achieving the standards; and

3. Revise the plan, as necessary, based on the results of the evaluation, to ensure continuous improvement of students in the schoolwide program.
- E. A description of how the school will ensure parental involvement in the planning, review, and improvement of the schoolwide program plan (described in Stakeholder Involvement and/or Strategies/Activities).
- F. A description of the activities the school will include to ensure that students who experience difficulty attaining proficient or advanced levels of academic achievement standards will be provided with effective, timely additional support, including measures to
 1. Ensure that those students' difficulties are identified on a timely basis; and
 2. Provide sufficient information on which to base effective assistance to those students.
- G. For an elementary school, a description of how the school will assist preschool students in the successful transition from early childhood programs to the school.
- H. A description of how the school will use resources to carry out these components (described in the Proposed Expenditures for Strategies/Activities).
- I. A description of any other activities and objectives as established by the SSC (described in the Strategies/Activities).

Authority Cited: S Title 34 of the Code of Federal Regulations (34 CFR), sections 200.25-26, and 200.29, and sections-1114(b)(7)(A)(i)-(iii) and 1118(b) of the ESEA. *EC* sections 6400 et. seq.



2021

EMPLOYEE BENEFITS GUIDE

Welcome to Your Employee Benefits

This guide provides a summary of your benefit options and is designed to help you make choices and enroll for coverage. If you would like more information about any of the benefits described here, please contact Tanya Rodriguez or Leticia Duarte at Ventura Charter School (VCSBSA) office.



Contents

3	Enrollment Information <ul style="list-style-type: none"><i>Who May Enroll</i><i>When You Can Enroll</i><i>Changes to Enrollment</i><i>Paying for Your Coverage</i>
4	Medical Benefits <ul style="list-style-type: none"><i>Anthem Blue Cross PPO Plans</i><i>Kaiser Permanente HMO Plan</i><i>Telemedicine Benefits</i><i>Additional Health Benefits for Anthem Plan Members</i><i>Additional Health Benefits for Kaiser HMO Plan Members</i><i>Tips on Getting the Most from Your Health Benefits</i>
13	Dental Benefits <ul style="list-style-type: none"><i>Anthem Blue Cross Dental PPO</i>
13	Vision Benefits <ul style="list-style-type: none"><i>Anthem Blue Cross Vision PPO</i>
15	Income Protection Benefits <ul style="list-style-type: none"><i>Lincoln Financial Basic Life and AD&D</i><i>Lincoln Financial Voluntary Life and AD&D</i><i>Lincoln Financial Short Term Disability</i><i>Lincoln Financial Long Term Disability</i>
16	Employee Assistance Program <ul style="list-style-type: none"><i>Anthem Employee Assistance Program (EAP)</i>
17	Flexible Spending Account <ul style="list-style-type: none"><i>Health Care Spending Account</i><i>Dependent Care Spending Account</i>
18	Resources and Contacts
19	Important Information <ul style="list-style-type: none"><i>Annual Notices</i><i>Summary of Benefits and Coverage (SBC)</i><i>Individual Health Care Mandate</i>



Online Resources

You can access your benefits information whenever you want, from home or any place where you have internet access, by clicking on the “Our Services, Benefits” tab and selecting “Health Benefits” on the Ventura County Schools Business Services Authority website. You’ll find documents posted such as the Summary of Benefits and Coverage (SBC), annual notices, carrier benefit summaries, evidence of coverage booklets, claim forms, and much more.

The Ventura County Schools Business Services Authority website is located at www.vcsbsa.org.

Enrollment Information

Who May Enroll

Please contact your school site office manager to find out more details of your eligibility. If you are eligible for benefits, then you and your eligible dependents may participate in Peak Prep Charter School benefits program. Your eligible dependents include:

- Legally married spouse
- Registered domestic partner
- Children under the age of 26, regardless of student or marital status

**Benefits Plan Year:
May 1– April 30**

When You Can Enroll

As an eligible employee, you may enroll at the following times:

- As a new hire, you may participate in the school's benefits program on the first day of the month following date of hire
- Each year, during open enrollment
- Within 30 days of a qualifying event as defined by the IRS (see Changes To Enrollment below)

Changes To Enrollment

Our benefit plans are effective May 1st through April 30th. There is an annual open enrollment period each year, during which you can make new benefit elections for the following May 1st effective date. Once you make your benefit elections, you cannot change them throughout the year unless you experience a qualifying event as defined by the IRS. Examples include:

- Marriage, divorce, legal separation or annulment
- Birth or adoption of a child
- A qualified medical child support order
- Death of a spouse or child
- A change in your dependent's eligibility status
- Loss of coverage from another health plan
- Change in your residence or workplace (if your benefit options change)
- Loss of coverage through Medicaid or Children's Health Insurance Program (CHIP)
- Becoming eligible for a federal or state premium assistance program under Medicare, Medicaid, or CHIP

Coverage for a new dependent is not automatic. If you experience a qualifying event, you have 30 days to update your coverage. Please contact your office manager immediately following a qualifying event to complete the appropriate election forms as needed. If you do not update your coverage within 30 days from the qualifying event, you must wait until the next annual open enrollment period to update your coverage .

Paying For Your Coverage

You and the District share in the cost of the Medical/Dental/Vision benefits you elect. Any voluntary disability or cancer benefits you elect will be paid by you at discounted group rates. You have the option of having your contributions deducted before taxes are withheld for your Medical, Dental, and Vision benefits.

Paying for benefits before-tax means that your share of the costs are deducted before taxes are determined, resulting in more take-home pay for you. As a result, the IRS requires that your elections remain in effect for the entire year. You cannot drop or change coverage unless you experience a qualifying event.

Important Information Regarding your Medical Rates/ Premium:

Medical rates are based on each member's age as of the effective date of coverage as noted below and are locked until the end of each plan year.

- Newly eligible employee and dependents - the first of the month following date of hire.
- During open enrollment - the beginning of the plan year.
- For qualifying events (if you are adding coverage for you and/ or your dependents) - the member's age as of the qualifying event effective date.

Medical Benefits

Medical Insurance

Anthem Blue Cross | HMO Medical Plans

With the Anthem Blue Cross Health Maintenance Organization (HMO) plan, you must choose a primary care physician (PCP) or medical group within the HMO network. All of your care must be directed through your PCP or medical group. Any specialty care you need will be coordinated through your PCP and will generally require a referral or authorization. You will receive benefits only if you use the doctors, clinics and hospitals that belong to the medical group in which you are enrolled, except in the case of an emergency.

Anthem Blue Cross | PPO Medical Plans

The Anthem Blue Cross Preferred Provider Organization (PPO) plan allows you to direct your own care. You are not limited to the physicians within the “Managed Choice POS (Open Access)” network and you may self-refer to specialists. If you receive care from a physician who is a member of the PPO network, a greater percentage of the entire cost will be paid by the insurance plan. You may also obtain services using a non-network provider; however, you will be responsible for the difference between the covered amount and the actual charges and you may be responsible for filing claims.

Anthem Blue Cross | HSA PPO Medical Plan

The Health Savings Account (HSA) plan through Anthem Blue Cross combines a high deductible health plan (HDHP) with a special, tax-qualified savings account. You may use your HSA funds to pay for current medical expenses or save toward future medical expenses. Similar to the PPO plan, you have the freedom to choose your doctor without the requirement of selecting a PCP and you may self-refer to specialists. You may use the Anthem Blue Cross PPO providers whose negotiated rates provide richer levels of benefits with claim forms filed by the providers. You may also obtain services using a non-network provider; however, you will be responsible for the difference between the covered amount and the actual charges and you may be responsible for filing claims.

Kaiser Permanente | HMO Medical Plan

With the Kaiser Permanente Health Maintenance Organization (HMO) plan, services must be obtained at a Kaiser Permanente facility, except in the case of emergency. Kaiser Permanente integrates all elements of healthcare such as physicians, medical centers, pharmacy, and administration in one convenient facility. In addition, Kaiser Permanente offers online tools so you can email your doctor’s office, make appointments, refill prescriptions, and more.



Finding a Medical Provider

- Kaiser Permanente: Go to www.kp.org or call the number provided on your ID card.
- Anthem Blue Cross: Go to www.anthem.com/ca or call the number provided on your ID card.
-



Benefits Video: Medical Plan Terms

If you’ve ever been confused about medical plan terms like deductibles, copays, coinsurance, and out-of-pocket maximums, you’re not alone! Watch this quick video for a better understanding of how our medical plans work:

<http://video.burnhambenefits.com/terms>.

Medical Benefits

Telemedicine Benefits

Phone and/or video visits are an excellent option for convenient, accessible care when you don't need a doctor to see you in person. They are also a good choice when away from home or if you need short term prescription drug refills. Both Anthem and Kaiser offers telemedicine coverage with all medical plans.

Anthem Blue Cross | Live Health Online

LiveHealth Online uses two-way video to connect you with U.S. board certified doctors over the internet. You can see a doctor on the go, right from your mobile device. Doctors can answer your questions, make a diagnosis and even prescribe basic medications, if you need them. Enrolling is really quick and easy. Then, each time you log in, you'll see doctors that are available in your state. If English isn't your first language, try searching for a doctor based on your language preference. You can use LiveHealth Online for many different health issues, such as colds, the flu, allergies, sinus infections, bronchitis, diarrhea, and family health. Keep in mind, LiveHealth Online is not for emergencies. If you experience an emergency, you should go to the emergency room or call 911.

If you are feeling stressed, worried, or having a tough time, you can talk to a licensed psychologist or therapist through video using LiveHealth Online Psychology. It's easy to use, private and, in most cases, you can see a therapist within four days or less.



Accessing LiveHealth Online

Go to www.livehealthonline.com. Select "Sign Up" if you do not have an account. Click "Log In" if you do have an account. Complete the information about yourself and your health issue, then search for a doctor in your area.

LiveHealth Online Psychology: After you log in to LiveHealth Online, select LiveHealth Online Psychology.

Mobile App for Apple and Android Devices: Download and open the LiveHealth Online app on your Apple or Android device. Create a six-digit pin number. You'll need this number every time you use the app. Complete the "Tell Us About Yourself" page to begin.

Kaiser Members: Phone and Video Visits

- Log in to your Kaiser account at www.kp.org to make a free phone/video appointment with your doctor or call 800-464-4000
- For phone visits, the doctor will call you at the time of the appointment
- For video visits, go to <https://mydoctor.kaiserpermanente.org/ncal/videovisit/#>, click Join your visit and log in
- There is no copay for phone or video visits

Common Conditions Treated With Telemedicine

General Care			Pediatric Care
Allergies	Fever	Respiratory Infections	Cold & Flu
Asthma	Headache	Sinus Infections	Constipation
Bronchitis	Infections	Skin Infections	Ear Infections
Cold & Flu	Insect Bites	Sore Throat	Nausea
Diarrhea	Joint Aches	Urinary Tract Infections	Pink Eye
Ear Infections	Rashes	And More!	And More!

Medical Benefits



Anthem Website

Features:

- Find a doctor
- View claims status
- Take a health assessment to receive your overall health score
- Compare cost and quality for common procedures
- The Health Record tool keeps your records available and up to date
- Refill prescriptions
- Access SpecialOffers@Anthem product and service discounts

If you're an Anthem member but haven't registered, go to **www.anthem.com/ca** from your computer and click Register Now.

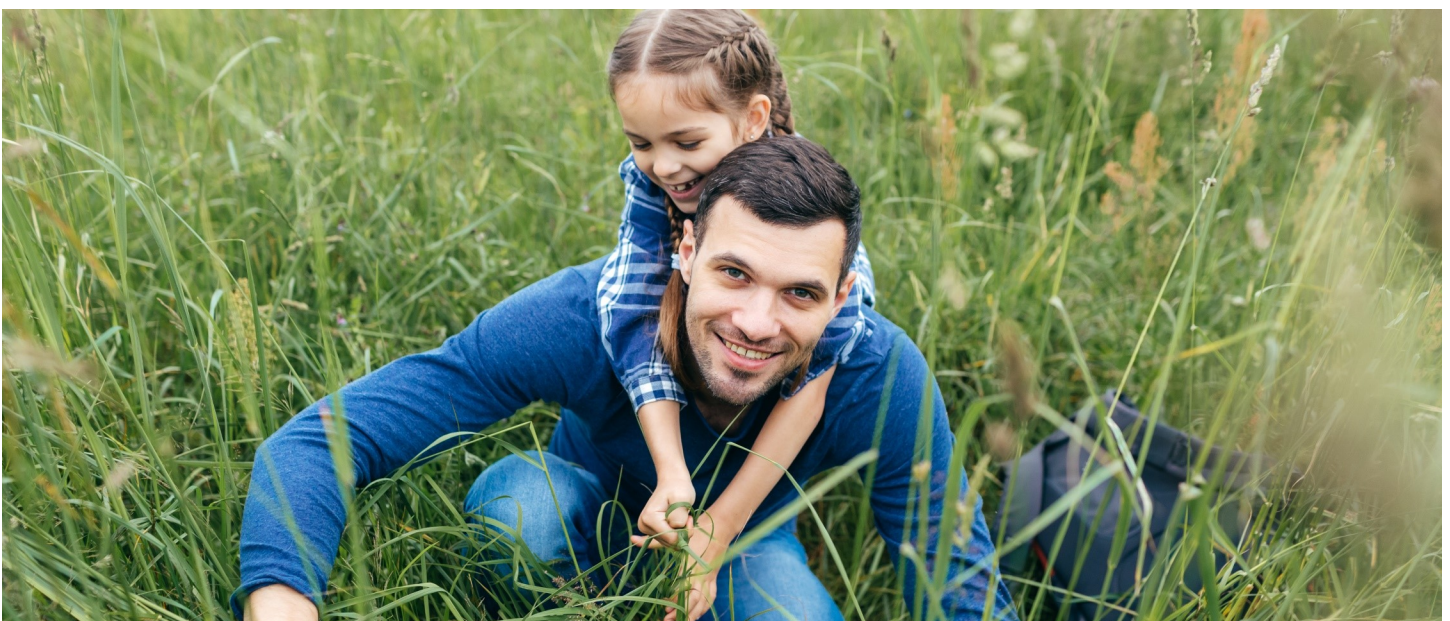


Anthem's Sydney Mobile App

Features:

- Uses Artificial Intelligence (AI) to deliver a more powerful mobile experience.
- Keep your ID card on your phone that can be viewed, faxed or sent via email right from your mobile device.
- Search for a doctor, specialist, urgent care, or hospital close by with maps and driving directions.
- See what nearby doctors and facilities charge for a procedure. You can compare them on cost and quality.
- Check the cost of prescription drugs, get refills, or switch to Anthem's home delivery prescription drug program.
- Use the Health Record tool, which keeps your health records available and up-to-date.
- Use the chatbot to get answers to common questions right away.

Anthem's mobile app is free. To log in on your smartphone, you must be registered on Anthem's secure member site and have a user name and password.



Medical Benefits

Benefits	Anthem Blue Cross SG Gold PPO 30/500/20% (5SY2)		Anthem Blue Cross SG Gold PPO 35/1000/20% (5SZ2)	
	PPO Network	Non-Network ¹	PPO Network	Non-Network ¹
Health Benefits				
Lifetime Maximum	Unlimited		Unlimited	
Calendar Year Deductible	Individual: \$500 Family: \$1,500	Individual: \$2,000 Family: \$4,000	Individual: \$1,000 Family: \$3,000	Individual: \$2,000 Family: \$4,000
Out-of-Pocket Maximum	Individual: \$7,500 Family: \$15,000	Individual: \$15,000 Family: \$30,000	Individual: \$7,800 Family: \$15,600	Individual: \$15,600 Family: \$31,200
Office Visits	\$30/\$60	Ded, 50%	\$35/\$60	Ded, 50%
Telehealth (<i>Livehealth</i>) (Includes Mental Health)	\$0, 3 visit max, then \$5 per visit	Not Covered	\$0, 3 visit max, then \$5 per visit	Not Covered
Inpatient Hospitalization ²	Ded, 20%	Ded, 50%	Ded, 20%	Ded, 50%
Diagnostic Lab and X-Ray	Office: \$15 Freestanding: Ded, 20%	Ded, 50%	Office: \$15 Freestanding: Ded, 20%	Ded, 50%
Emergency Services	Ded, \$250 Copay, 20%		Ded, \$250 Copay, 20%	
Urgent Care	\$60	Ded, 50%	\$60	Ded, 50%
Preventive Care	0%	Ded, 50%	0%	Ded, 50%
Physical Therapy, Occupational Therapy	Office: \$30 Freestanding: Ded, 20%	Ded, 50%	Office: \$35 Freestanding: Ded, 20%	Ded, 50%
Chiropractic Services	50% (20 visits)	Not Covered	50% (20 visits)	Not Covered
Acupuncture	\$30	Not Covered	\$35	Not Covered
Durable Medical Equip ²	Ded, 50%	Ded, 50%	Ded, 50%	Not Covered
Mental Health / Substance Abuse - Inpatient ² - Outpatient	Ded, 20% \$30	Ded, 50% Ded, 50%	Ded, 20% \$35	Ded, 50% Ded, 50%
Pharmacy Benefits				
Pharmacy Deductible	\$200 Ind/\$400 Fam (does not apply to generic)		\$200 Ind/\$400 Fam (does not apply to generic)	
Pharmacy Copay	<u>Retail (30 Days)</u>		<u>Retail (30 Days)</u>	
- Tier 1 (Generic) ³	Lvl 1: \$15; Lvl 2: \$25	Not Covered	Lvl 1: \$15; Lvl 2: \$25	Not Covered
- Tier 2 (Preferred)	Lvl 1: \$45; Lvl 2: \$65	Not Covered	Lvl 1: \$45; Lvl 2: \$65	Not Covered
- Tier 3 (Non Preferred)	Lvl 1: \$85; Lvl 2: \$95	Not Covered	Lvl 1: \$85; Lvl 2: \$95	Not Covered
- Tier 4 (Specialty)	Lvl 1: 30% to \$250 max Lvl2: 40% to 250 max	Not Covered	Lvl 1: 30% to \$250 max Lvl2: 40% to 250 max	Not Covered
	90 Day Retail/ Mail Order		90 Day Retail/ Mail Order	
- Tier 1 (Generic) ³	Lvl 1: \$38	Not Covered	Lvl 1: \$38	Not Covered
- Tier 2 (Preferred)	Lvl 1: \$145	Not Covered	Lvl 1: \$145	Not Covered
- Tier 3 (Non Preferred)	Lvl 1: \$255	Not Covered	Lvl 1: \$255	Not Covered
- Tier 4 (Specialty)	Lvl 1: 30% to \$250 max - (30 day supply limit) Lvl 2: 40% to \$250 max - (30 day supply limit)	Not Covered	Lvl 1: 30% to \$250 max - (30 day supply limit) Lvl 2: 40% to \$250 max - (30 day supply limit)	Not Covered

¹ When using the non-network tier, you are responsible for all amounts exceeding the fee schedule.

² Subject to utilization review or medical necessity.

³ Not subject to pharmacy deductible

Medical Benefits

Benefits	Anthem Blue Cross SG Silver PPO 2000/30% w/ HSA (5SW5/5SWD)	
	PPO Network	Non-Network ¹
Health Benefits		
Lifetime Maximum	Unlimited	
Calendar Year Deductible	Individual: \$2,000 Family: \$2,800/individual; \$4,000/family	Individual: \$4,000 Family: \$5,600/individual; \$8,000/family
Out-of-Pocket Maximum	Individual: \$6,750 Family: \$13,500	Individual: \$13,500 Family: \$27,000
Office Visits	Ded, 30%	Ded, 50%
Telehealth (<i>Livehealth</i>) (Includes Mental Health)	Ded, 30%	Not Covered
Inpatient Hospitalization ²	Ded, 30%	Ded, 50%
Ambulatory Surgery Center ²	Ded, 30%	Ded, 50%
Diagnostic Lab and X-Ray	Office: Ded, 30% Freestanding: Ded, 30%	Ded, 50%
Emergency Services	Ded, 30%	Ded, 30%
Urgent Care	Ded, 30%	Ded, 50%
Preventive Care	0%	Ded, 50%
Physical Therapy, Occupational Therapy, Chiropractic Services ²	Ded, 30%	Ded, 50%
Acupuncture(12 Visits/Year)	Chiropractic :Ded, 50%	Not Covered
Durable Medical Equipment ²	Ded. 30%	Not Covered
Mental Health / Substance Abuse - Inpatient ² - Outpatient	Ded, 50%	Not Covered
Pharmacy Benefits		
Pharmacy Deductible	Combined with Medical Ded	
Pharmacy Copay	<u>Retail (30 Days)</u>	Not Covered
- Tier 1 (Generic)	Lvl 1: \$20; Lvl 2: \$25	Not Covered
- Tier 2 (Preferred)	Lvl 1: \$60; Lvl 2: \$95	Not Covered
- Tier 3 (Non Preferred)	Lvl 1: \$85; Lvl 2: \$115	Not Covered
- Tier 4 (Specialty)	Lvl 1: 30% to \$250 max/ Lvl2: 40% to 250 max 90 Day Retail/ Mail Order	Not Covered
- Tier 1 (Generic)	Lvl 1: \$38	Not Covered
- Tier 2 (Preferred)	Lvl 1: \$145	Not Covered
- Tier 3 (Non Preferred)	Lvl 1: \$255	Not Covered
- Tier 4 (Specialty)	Lvl 1: 30% to \$250 max - (30 day supply limit) Lvl 2: 40% to \$250 max - (30 day supply limit)	Not Covered

¹ When using the non-network tier, you are responsible for all amounts exceeding the fee schedule.

² Subject to utilization review or medical necessity.

Medical Benefits

Benefits

Anthem Blue Cross SG
Gold HMO 35 (5SWW)

Kaiser Permanente
Platinum 90 HMO 0/20

Health Benefits

Lifetime Maximum	Unlimited	Unlimited
Calendar Year Deductible	\$0 Individual / \$0 Family	\$0 Individual / \$0 Family
Out-of-Pocket Maximum	\$6,500 Individual / \$13,000 Family	\$4,500 Individual / \$9,000 Family
Office Visits	\$35/\$70	\$20 / \$30
Telehealth (Includes Mental Health)	\$0, 3 visit max, then \$5 per visit (Livehealth)	\$0
Inpatient Hospitalization ²	\$750/day, 4 days max	\$250/day, 5 days max
Ambulatory Surgery Center ²	\$450	\$150
Diagnostic Lab and X-Ray	Office: \$15 Outpatient: \$45	\$20/ \$30
Emergency Services	\$300	\$150
Urgent Care	\$35	\$20 Copay
Preventive Care	0%	0%
Physical Therapy, Occupational Therapy	Office: \$35 Outpatient: \$70	N/A
Chiropractic Services ²	\$35 (20 visits)	N/A
Acupuncture	\$35	N/A
Durable Medical Equipment ²	\$100	N/A
Mental Health / Subst. Abuse - Inpatient ² - Outpatient	\$750/day, 4 days max \$35	\$250/day, 5 day max \$20

Pharmacy Benefits

Pharmacy Deductible	None	\$0 Individual / \$0 Family
Pharmacy Copay - Tier 1 (Generic) ³ - Tier 2 (Preferred) - Tier 3 (Non Preferred) - Tier 4 (Specialty)	<u>Retail (30 Days)</u> Lvl 1: \$15; Lvl 2: \$25 Lvl 1: \$40; Lvl 2: \$60 Lvl 1: \$80; Lvl 2: \$90 Lvl 1: 30% to \$250 max Lvl 2: 40% to 250 max 90 Day Retail/ Mail Order Lvl 1: \$38 Lvl 1: \$120 Lvl 1: \$240 Lvl 1: 30% to \$250 max - (30 day supply limit) Lvl 2: 40% to \$250 max - (30 day supply limit)	<u>Retail (30 Days)</u> \$5 \$20 \$20 (after approval) 10% to \$250 max 100 Day Retail / Mail Order \$10 \$40 \$40 (after approval)

¹ When using the non-network tier, you are responsible for all amounts exceeding the fee schedule.

² Subject to utilization review or medical necessity.

Additional Health Benefits

For Anthem Plan Members

Diabetes Prevention Program: Solera4ME

If you qualify, you can get access to a free, 16-week leading-edge program that helps with weight loss, adopting healthy habits, and can significantly reduce your risk of developing diabetes. Members can choose from an array of national and local programs such as Weight Watchers, Retrofit, Jenny Craig, Healthslate, and more. Most programs provide access to a personal health coach, group support, weekly lessons, and tools such as a wireless scale or an activity tracker.

To find out if you qualify, go to <https://solera4me.com/sisc> and take a 1-minute quiz.

Time Well Spent

Anthem provides you with a large variety of wellness resources, designed to help you be healthier and more productive; to access Time Well Spent, visit <https://timewellspent-ca.anthem.com>.

Condition Care

Condition Care provides free support to better understand and manage specific chronic health conditions and improve overall quality of life. The program provides current, accurate data about Asthma, Diabetes, Congestive Heart Failure (CHF), Coronary Artery Disease (CAD) and Chronic Obstructive Pulmonary Disease (COPD), plus education to help you better manage and monitor your condition. ConditionCare also provides depression screening.

SpecialOffers Program

You can save money on things that are good for you at www.anthem.com/ca. With SpecialOffers, you can get discounts on products and services that help promote better health and well-being. It's just one of the perks of being a member. Check out how much you can save:



Vision and Hearing

1-800 CONTACTS
Glasses.com
Premier LASIK
Amplifon
Beltone



Fitness and Health

Jenny Craig
Lindora
SelfHelpWorks
GlobalFit
ChooseHealthy
Performance Bicycle
Garmin



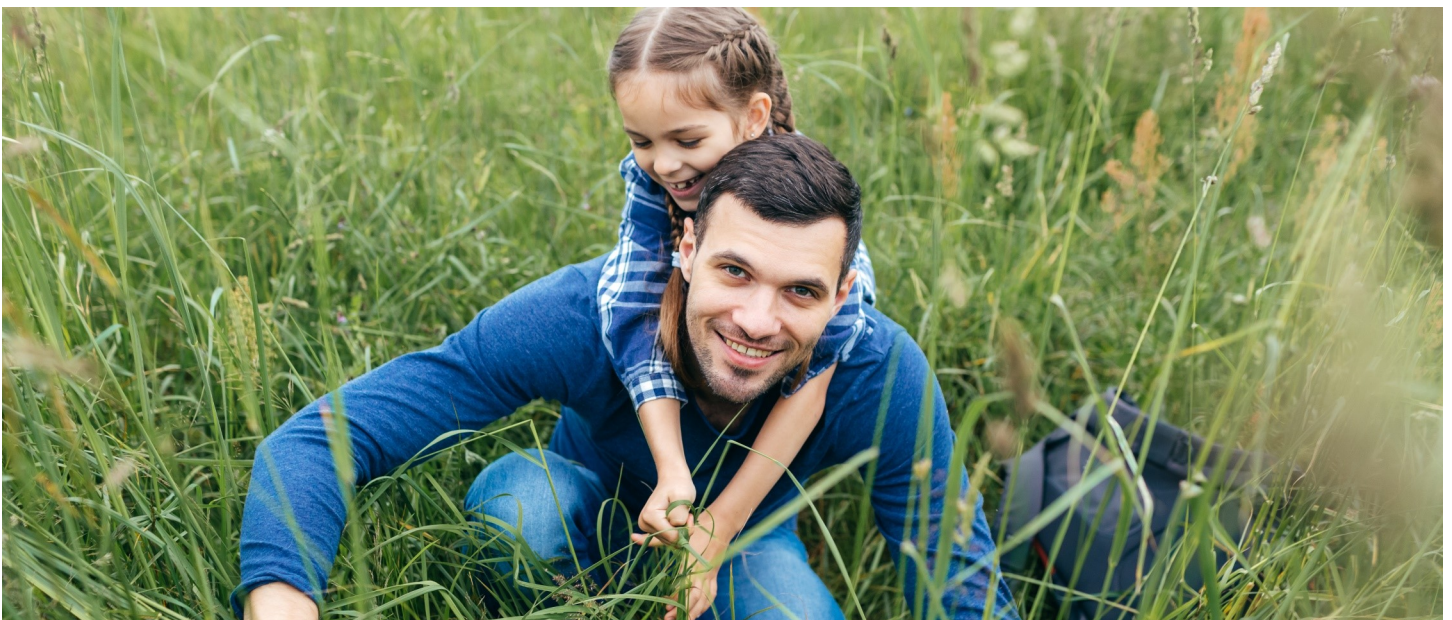
Family and Home

Safe Beginnings
VPI Pet Insurance
ASPCA Pet Health Insurance
LinkWell
WINFertility
LifeMart
HelpCare Plus



Medicine and Treatment

Puritan's Pride
Allergy Control Products
National Allergy Supply



Additional Health Benefits



For Kaiser HMO Plan Members

Healthy Lifestyle Programs

You have access to an array of free programs designed to support you in cultivating good health, fitness and well being. To learn more and/or join any of them, go to kp.org/healthylifestyles.

Healthy Lifestyle Programs for Chronic Conditions

These programs are designed to support people living with chronic conditions or health issues. Go to kp.org/healthylifestyles to join them. Programs include:

- Care for Diabetes: Receive support in managing diabetes to help you lead a healthier, more satisfying life.
- Care for Your Health: A customized plan to help you handle medications and treatments, and deal with daily challenges
- Care for Pain: A personalized pain management plan can help you enjoy life to the fullest while dealing effectively with your chronic pain.

Wellness Coaching

Partner with a wellness coach (available in both English and Spanish) at no cost to you. Programs are available to help you:

- Manage your weight
- Quit tobacco
- Reduce stress
- Increase activity
- Eat healthier

Call 866.862.4295 to get started.

ChooseHealthy Discounts

This program offers a directory of complementary care, an online store, fitness club discounts, savings on health products and services, and more. When you register for ChooseHealthy, you'll also receive a free annual Premium Membership (a \$69.95 value). This membership gives you access to online resources and tools to help you achieve your health and fitness goals. You can develop a personalized exercise or meal plan, track your progress, and more.

To get started, go to kp.org, log in, click the Health and Wellness tab, and scroll down to Programs and Classes. You may also call 877.335.2746.

Medical Benefits

Tips on Getting the Most from Your Health Benefits

1 Ask Questions

If you are having a procedure or planning an upcoming procedure, make sure you know how the procedure will be covered and what your out-of-pocket cost will be, if any.

2 Utilize your Free Preventive Care Benefits to Stay Healthy.

In-network preventive care benefits are covered at no charge to you. Take advantage of these no cost benefits now to hopefully avoid major illnesses and the costs they bring in the future.

3 Get the Right Health Care and Save Money

Choosing the right care for your medical situation will help save you money out-of-pocket:

- **Doctor's Office Visit or Telemedicine** visit: These are the best choices for non-urgent medical issues.
- **Urgent Care:** This is the best choice for non-life threatening medical issues that require immediate in-person care when you can't get an appointment for a Doctor's Office Visit.
- **Emergency Room:** You should use the Emergency Room for life threatening emergencies, or for other issues that require immediate in-person medical care outside Urgent Care hours.

4 Use Generic Drugs When Available

The best way to save on prescriptions is to use generic medications as opposed to brand name drugs. When you use generic medications, you will pay the lowest copay.

Generic drugs must use the same active ingredients as the brand name version of the drug. A generic drug must also meet the same quality and safety standards.

5 Use the Mail-Order Prescription Drug Benefit for Maintenance Medications

If you take medications on a long term basis, the mail order prescription drug benefit can save you money.



Save Money on Your Health Care Expenses

When you use your Flexible Spending Account (see page 15) to pay for eligible, unreimbursed medical, dental and vision care expenses, you reduce your taxable income and can save money on taxes.

Dental Benefits

Anthem Blue Cross Dental PPO

With the Anthem Dental Preferred Provider Organization (PPO) dental plan, you may visit a PPO dentist and benefit from the negotiated rate or visit a non-network dentist. When you utilize a Premier Network dentist, your out-of-pocket expenses will be less. You may also obtain services using a non-network dentist; however, you will be responsible for the difference between the covered amount and the actual charges and you may be responsible for filing claims.

Plan Name	Anthem Dental Essential Choice PPO Plan	
	In-Network (Dental Complete Network)	Non-Network
Dental Benefits		
Calendar Year Maximum	\$1,500	\$1,500
Calendar Year Deductible	None	
Diagnostic & Preventive Services - Exams, cleanings (2) per calendar year - X-rays (frequency varies on type)	100%	100% MAC
Basic Services - Fillings, simple tooth extractions, sealants - Endodontics (root canals), oral surgery - Periodontics (gum treatment)	80%	80% MAC
Major Services - Crowns, inlays, onlays, cast restorations	50%	50% MAC
Prosthodontic Services - Bridges, dentures, implants	50%	50% MAC
Dental Accident Services	100%	50%-100
Orthodontia (through age 18)	50%	50% MAC

¹ Dentists who are out-of-network have not agreed to pricing, and may bill you for the difference between what Anthem pays them and what the dentist usually charges.



Finding a Dental Provider

Go to anthem.com/ca , Network Name: Dental Complete or call 877.567.1804

We recommend you ask your dentist for a predetermination if total charges are expected to exceed \$300. Predetermination enables you and your dentist to know in advance what the payment will be for any service that may be in question.

Employee Tier	Dental Plan Cost- Tenthly
SINGLE	\$74.66
2-PARTY	\$152.32
EC	\$176.26
FAMILY	\$263.05

Vision Benefits

Anthem Blue View Vision PPO

provides professional vision care and high-quality lenses and frames through a broad network of optical specialists. You will receive richer benefits if you utilize a network provider. If you use a non-network provider, you will be responsible for paying all charges at the time of your appointment and will be required to file an itemized claim with Anthem.

You will have access to the nation's largest vision network. You may choose from private practice doctors, local optical stores and national retail stores including LensCrafters®, Target Optical®, Sears Optical®, JCPenney® Optical and most Pearle Vision® locations. points nationwide. Please note, benefits may vary at affiliate locations.

Plan Name	Anthem Blue View Vision	
	In-Network (Blue View Vision Network)	Non-Network ¹
Vision Benefits		
Copay - Examination (Every 12 Months) - Materials	\$10 Copay \$130 Allowance, 20%	Up to \$42 Reimbursement Up to \$45 Reimbursement
Examination (Every 12 Months)	0%	\$35 Reimbursement
Lenses (Every 12 Months) - Single Vision - Bifocal - Trifocal	\$25 Copay \$25 Copay \$25 Copay	Up to \$40 Reimbursement Up to \$60 Reimbursement Up to \$80 Reimbursement
Frames (Every 12 Months)	\$130 Allowance, 20%	Up to \$45 Reimbursement
Contact Lenses (Every 12 Months)	In Lieu of Frames and Lenses	
- Cosmetic / Elective - Medically Necessary	\$130 Allowance, 15% 0%	\$95 Reimbursement \$210 Reimbursement
Laser Vision Correction	Discounts Apply	Not Covered

¹ When using the non-network tier, you are responsible for paying all of the charges at the time of your appointment and filing a claim for reimbursement.

Employee Tier	Vision Plan Cost—Monthly
SINGLE	\$8.53
2-PARTY	\$17.05
EC	\$15.73
FAMILY	\$24.71



Finding a Vision Provider

Go to www.anthem.com/ca or call 866.723.0515.

Income Protection Benefits

Lincoln Financial Group | Basic Life and AD&D Insurance

Life insurance protects your family or other beneficiaries in the event of your death while you are still actively employed with the company. Peak Prep pays for coverage, offered through Lincoln Financial Group, in the amount \$50,000. If your death is due to a covered accident or injury, your beneficiary will receive an additional amount through Accidental Death and Dismemberment (AD&D) coverage.

Lincoln Financial Group | Voluntary Life and AD&D Insurance

In addition to the company provided Basic Life and AD&D benefits, you may elect to purchase additional Term Life and AD&D insurance at discounted group rates provided by Lincoln Financial Group. You pay for this coverage with after-tax dollars through convenient payroll deductions. You may purchase coverage for yourself and your eligible dependents as follows:

- **Employee:** You may purchase coverage for yourself in increments of \$10,000 up to the lesser of 5 times your annual salary or \$500,000.
- **Spouse:** If you buy coverage for yourself, you may also purchase coverage for your eligible spouse. Benefits for your spouse are available in increments of \$5,000 up to the lesser of 50% of your election or \$250,000.
- **Child(ren):** If you buy coverage for yourself, you may also purchase coverage for your eligible dependent child(ren) in the following amounts: Age: 6 months to age 26: Flat \$10,000. Age 1 day to 6 months: Flat \$250.

Guarantee issue is a pre-approved amount of coverage that does not require you to provide proof of good health, and is available to you during your initial eligibility period (upon hire). Guarantee issue is available in the following amounts:

- **Employee:** \$50,000
- **Spouse:** \$10,000
- **Child(ren):** \$10,000

If you are no longer in your initial eligibility period, you may enroll in Voluntary Life and AD&D insurance anytime during the year as long as you provide proof of good health. To provide proof of good health, you will be asked to complete a health questionnaire and are subject to insurance carrier approval. Lincoln Financial Group may approve or decline coverage based on a review of your health history.

Lincoln Financial Group | Short Term Disability Insurance

Peak Prep pays for your Short Term Disability (STD) that provides income replacement if you become disabled due to accident, sickness or pregnancy, through Lincoln Financial Group. If you experience a temporary disability, benefits begin after 7 days from the start of your accident, sickness or pregnancy. STD works with state disability programs, Social Security, and any other group disability coverage, to provide you with a combined monthly benefit equal to 60% of your pre-disability earnings up to a maximum benefit of \$2,308 per week for up to 25 weeks.

Lincoln Financial Group | Long Term Disability Insurance

Peak Prep pays for your Long Term Disability (LTD) that provides income replacement if you become disabled for an extended period of time, through Lincoln Financial Group. If you become totally and permanently disabled, benefits begin after 180 days from the start of your illness or injury. LTD works with state disability programs, Social Security, and any other group disability coverage, to provide you with a combined monthly benefit equal to 60% of your pre-disability earnings up to a maximum benefit of \$10,000 per month.

24 | Employee Assistance Program

EmployeeConnectSM | Employee Assistance Program

The EmployeeConnectSM Employee Assistance Program (EAP) through Lincoln Financial provides you and your household members with free, confidential assistance to help with personal or professional problems that may interfere with work or family responsibilities and obligations. Services are available 24 hours a day, 7 days a week via a toll-free nationwide number. Additionally, you and your household members can receive **up to five in-person counseling sessions** per person per year.

The EAP can help with the following issues:



Stress, Anxiety
or Depression



Relationship Issues



Grief and Loss



Legal Assistance



Financial Services
and Referrals



Childcare Resources and
Referrals



Senior Care



Pet Care



Identity Theft



and More!

Peak Prep Charter School holds the privacy of our employees in the highest regard. Any information you share with an EAP counselor will not be shared with Peak Prep Charter, and is protected by state and federal privacy laws.



Accessing the EAP

Go to www.guidanceresources.com

(Enter user name: LFGsupport and password: LFGsupport1)

or call **(888) 628-4824** to be immediately connected to an EAP counselor.

Flexible Spending Accounts

Flexible Spending Accounts

You can set aside money in Flexible Spending Accounts (FSA) before taxes are deducted to pay for certain health and dependent care expenses, lowering your taxable income and increasing your take home pay. Only expenses for services incurred during the plan year are eligible for reimbursement from your accounts. You choose how you want to receive reimbursement for your eligible expenses. You may use a debit card, or you may sign up for direct deposit to your bank account or you may have a check sent to your home.

Please remember that if you are using your debit card, you must save your receipts, just in case Paylocity needs a copy for verification. Also, all receipts should be itemized to reflect what product or service was purchased. Credit card receipts are not sufficient per IRS guidelines.

Your FSA elections expire each plan year on April 30. If you plan to participate in the FSA for the upcoming plan year, you are required to re-enroll.

Health Care Spending Account

This plan is used to pay for expenses not covered under your health plans, such as deductibles, coinsurance, copays, expenses that exceed plan limits, over-the-counter drugs, and menstrual supplies. You may defer up to \$2,750 pre-tax per year.

Dependent Care Spending Account

This plan is used to pay for eligible expenses you incur for child care, or for the care of a disabled dependent, while you work. Employees may defer up to \$10,500 pre-tax per year. You can use the Dependent Care Spending Account to be reimbursed for: Licensed nursery schools, qualified childcare centers, after school programs, summer camps (under age 13), preschool, and adult daycare facilities.



Benefits Video: Flexible Spending Accounts

This quick video explains how Flexible Spending Accounts work and how they can help you save money:

<http://video.burnhambenefits.com/fsa>

FSAs offer sizable tax advantages. The trade-off is that these accounts are subject to strict IRS regulations, including the use-it-or-lose-it rule. According to this rule, you must forfeit any money left in your account(s) after your expenses for the year have been reimbursed. The IRS does not allow the return of unused account balances at the end of the plan year, and remaining balances cannot be carried forward to a future plan year. If you are unable to estimate your health care and dependent care expenses accurately, it is better to be conservative and underestimate rather than overestimate your expenses.

In the example below, Dan estimates that he will have approximately \$1,200 in out-of-pocket health care expenses next year and is looking to increase his take-home pay.

Dan's Pay, Taxes and Health Care Expenses	Without the Health Care FSA	With the Health Care FSA
Gross Pay (Annual)	\$35,000	\$35,000
Pre-tax Health Care FSA	\$0	\$1,200
Taxable Gross Income	\$35,000	\$33,800
Payroll Taxes (at 30%)	\$10,500	\$10,140
Health Care Cost	\$1,200	\$0
Net Pay	\$23,300	\$23,660
Annual Net Pay Increase	\$0	\$360

Resources and Contacts

Below is a list of insurance carrier contacts should you require assistance with your benefit questions following open enrollment. If you are unable to resolve your issues or questions with the insurance carriers, please contact the Payroll & Benefits Department

Medical Plans

Anthem Blue Cross PPO	855-383-7248
Anthem Blue Cross HMO	www.anthem.com/ca
Anthem Blue Cross - Prescription Drugs - IngenioRx	800-700-2533 www.anthem.com/pharmacyinformation

Kaiser Permanente HMO	800-760-4661 www.kp.org
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Dental Plan

Anthem Blue Cross - Dental	877-567-1804 www.anthem.com/ca
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Vision Plan

Anthem Blue Cross	866-723-0515 www.anthem.com/ca
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Employee Assistance Program

Lincoln Financial	888-628-4824 www.guidanceresources.com
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Life and Disability Plans

Lincoln Financial Group - Life and AD&D	800-423-2765
Lincoln Financial Group - Short Term Disability	www.lincolnfinancial.com
Lincoln Financial Group - Long Term Disability	

Additional Benefits Provided for Anthem Members Only

SOLERA4ME	www.solera4me.com/
Anthem Time Well Spent	https://timewellspent-ca.anthem.com
Anthem Condition Care	800.621.2232

Important Information

Annual Notices

The District plans are partially arranged by the District and governed by its plan rules and documents. ERISA and various other state and federal laws require that employers provide disclosure and annual notices to their plan participants. The District distributes annual notices to new-hires, and each year during open enrollment:

- **Medicare Part D Notice of Creditable Coverage:** Plans are required to provide each covered participant and dependent a Certificate of Creditable Coverage to qualify for enrollment in Medicare Part D prescription drug coverage when qualified without a penalty.
- **HIPAA Notice of Privacy Practices:** This notice is intended to inform employees of the privacy practices followed by the District's group health plan. It also explains the federal privacy rights afforded to you and the members of your family as plan participants covered under a group plan.
- **Women's Health and Cancer Rights Act (WHCRA):** This act contains important protections for breast cancer patients who choose breast reconstruction with a mastectomy.
- **Newborns' and Mothers' Health Protection Act:** This act affects the amount of time a mother and her newborn child are covered for a hospital stay following childbirth.
- **Special Enrollment Rights:** Plan participants are entitled to certain special enrollment rights outside of the District's open enrollment period. This notice provides information on special enrollment periods for loss of prior coverage or the addition of a new dependent.
- **Medicaid & Children's Health Insurance Program:** Some states offer premium assistance programs for those who are eligible for health coverage from their employers, but are unable to afford the premiums. This notice provides information on how to determine if your state offers a premium assistance program.

Summary of Benefits and Coverage (SBC)

Health insurance issuers and group health plans are required to provide you with an easy-to-understand summary about your health plan's benefits and coverage. This guide is designed to help you understand the medical plan options offered to you by Peak Prep Charter School. Please refer to the SBC and carrier contracts provided for additional plan details.

You can access your benefits information whenever you want, from home or any place where you have internet access, by clicking on the "Our Services, Benefits" tab and selecting "Health Benefits" on the Ventura County Schools Business Services Authority website. You'll find documents posted such as the Summary of Benefits and Coverage (SBC), annual notices, carrier benefit summaries, evidence of coverage booklets, claim forms, and much more.

The Ventura County Schools Business Services Authority website is located at www.vcsbsa.org.

Individual Health Care Mandate

Even though the Affordable Care Act (ACA)'s penalty for not having health coverage (known as the individual mandate) has been reduced to zero, if you are a taxpayer in California, you will still be required to have health coverage (unless you qualify for an exemption) or pay a penalty for the 2020 tax year. In addition, several other states, including Massachusetts, New Jersey, and Vermont, as well as the District of Columbia, have reinstated an individual mandate requirement, and others are considering doing so.

You may consider these options below to satisfy this requirement:

- Enroll in a medical plan offered by the District or another group medical plan meeting the requirements for minimum essential coverage;
- Purchase coverage through a health insurance marketplace;
- Enroll in coverage through a government-sponsored program if eligible.

However, if you choose to purchase coverage through the marketplace, because the District's medical plans are considered affordable and meet minimum value under the Affordable Care Act, you may not be eligible for a subsidy, and you may not see lower premiums or out-of-pocket costs through the marketplace. In addition, employer contributions to your medical benefits will be lost and your portion of medical premiums will no longer be paid via payroll deductions on a pre-tax basis.

For more information, go to www.healthcare.gov.



Learn more at www.burnhambenefits.com

This Employee Benefits Guide provides an overview of some of your benefit plan choices. It is for informational purposes only. It is not intended to be an agreement for continued employment. Neither is it a legal plan document. If there is a disagreement between this guide and the plan documents, the plan documents will govern.

In addition, the plans described in this guide are subject to change without notice. Continuation of any benefit plan or coverage is at the company's discretion and in accordance with federal and state laws. If you need additional information or have any questions about the benefit program, please contact Rodriguez and Leticia Duarte at Ventura Charter School (VCSBSA) office.



CliftonLarsonAllen LLP
2210 East Route 66
Glendora, CA 91740
626.857.7300 | fax 626.857.7302
CLAconnect.com

March 30, 2021

Board of Directors and Management
Peak Prep Pleasant Valley Charter School
2150 Pickwick Drive, Suite 304
Camarillo, CA 93010

Re: June 30, 2021 Tax Exempt Returns and State Filings

Dear Board of Directors and Management:

We are pleased that Peak Prep Pleasant Valley Charter School (“you,” “your,” or “the organization”) has engaged CliftonLarsonAllen LLP (“CLA,” “we,” “us,” and “our”) to prepare the organization’s federal Form 990 and applicable state filings. This letter confirms the scope, limitations, and related terms of our engagement for the year ended June 30, 2021.

Our responsibility to you

We will prepare the organization’s federal Form 990 and applicable state filings in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible. We will not audit or independently verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

Your responsibilities

It is your responsibility to provide us with all of the information needed to prepare complete and accurate returns and filings. We will have no obligation to prepare the returns and filings until you have provided such information to us. We will prepare filings for the same states where the organization filed last year unless organization personnel notify us to the contrary or other information clearly indicates the need for an additional return or state filing. It is your responsibility to comply with all foreign jurisdiction filing requirements. We have no obligation to prepare returns for foreign jurisdictions

The United States Supreme Court ruled in *South Dakota versus Wayfair* (6/21/18) that physical presence is no longer required to establish nexus for sales tax. This ruling may have broad implications, even beyond sales tax, as to where an organization is subject to tax. Please note that if the organization had a taxable presence in more than one jurisdiction, such as an employee or agent within the jurisdiction, any tangible property owned or rented within the jurisdiction, or if the organization exceeds any applicable economic nexus thresholds, the organization or related entities may be subject to state or local income, sales, use, franchise, or gross receipts tax in that jurisdiction depending upon the particular facts. It is the organization’s responsibility, not CLA’s, to determine if assistance is needed in deciding whether the organization or related entities may be liable for income, sales, use, franchise, or gross receipts tax, or have a filing requirement in the various state or local jurisdictions.

It is important for you to identify any ownership OR signature authority over a foreign bank account or other foreign financial assets which includes but is not limited to foreign: stocks, mutual funds, partnerships, bonds, retirement accounts, estates, trusts, annuities, swaps, and derivatives. Failure to disclose penalties can be significant, starting at \$10,000 and can be upwards of 50 percent of the value of the asset. Please provide account statements if you have any foreign account ownership or signature authority. Note that these rules do not apply to foreign investments held by U.S. mutual funds. In addition, ownership in a foreign business entity (association, corporation, disregarded entity, or partnership) could trigger additional U.S. foreign informational reporting requirements. These reporting requirements require the disclosure of ownership, financial information, and related-party transactions. Failure to properly disclose ownership and the required information could trigger a \$10,000 penalty per filing. We cannot be held responsible if you fail to identify or provide such information to us.

For all nonattest services we may provide to you, including the preparation of the federal Form 990 and applicable state filings, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services performed; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services. You are responsible to carefully review the federal Form 990 and state filings that we prepare on your behalf before signing and submitting them to tax authorities. We will advise you with regard to tax positions taken in the preparation of the federal Form 990 and state filings, but the responsibility for the federal Form 990 and state filings remains with you.

Tax examinations

All returns and filings are subject to potential examination by the IRS and state authorities. In the event of an examination, we will be available, at your request, to assist or represent the organization and its directors or officers. Services in connection with tax examinations are not included in our fee for preparation of the federal Form 990 and state filings. Our fee for such services will be billed to you separately, along with any direct costs.

Record retention

You are responsible for retaining all documents, records, canceled checks, receipts, or other evidence in support of information and amounts reported on the federal Form 990 and state filings. These items may be necessary in the event the taxing or other authority examines or challenges your federal Form 990 and state filings. These records should be kept for at least seven years. Your copy of the federal Form 990 and state filings should be retained indefinitely.

If carryover item(s) exist (e.g., capital loss, net operating loss, tax credits, etc.), you should retain the supporting records related to the carryover item(s) until the item has either been utilized (and the statute of limitations associated with the year of utilization has expired) or the carryforward period has expired.

In preparing the federal Form 990 and state filings, we rely on your representation that organization personnel and its directors or officers understand and have complied with these documentation requirements. The management of the organization is responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets, and for the substantial accuracy of the organization's financial records.

All of the records that you provide to us to prepare your federal Form 990 and state filings will be returned to you after our use. Our working papers, including any copies of your records that we chose to make, are our property and will be retained by us in accordance with our established records retention policy. This policy states, in general, that we will retain our working papers for a period of seven years. After this period expires, our working papers and files will be destroyed. Furthermore, physical deterioration or catastrophic events may shorten the time our records are available. The working papers and files of our firm are not a substitute for the records of the organization.

Tax consulting services

This engagement letter also covers tax consulting services that may arise for which the organization seeks our consultation and advice, both written and oral, that are not the subject of a separate engagement letter. These additional services are not included in our fees for the preparation of the federal Form 990 and state filings.

We will base our tax analysis and conclusions on the facts you provide to us, and will not independently verify those facts. We will review the applicable tax law, tax regulations, and other tax authorities, all of which are subject to change. At your request, we will provide a memorandum of our conclusions. Written advice provided by us is for the organization's information and use only and is not to be provided to any third party without our express written consent.

Unless we are separately engaged to do so, we will not continuously monitor and update our advice for subsequent changes or modifications to the tax law and regulations, or to the related judicial and administrative interpretations.

Communications and confidentiality

The Internal Revenue Code contains a limited privilege for confidentiality of tax advice between you and our firm. In addition, the laws of some states likewise recognize a confidentiality privilege for some accountant-client communications. You understand that CLA makes no representation, warranty or promise, and offers no opinion with respect to the applicability of any confidentiality privilege to any information supplied or communications you have with us, and, to the extent that we follow instructions from you to withhold such information or communications in the face of a request from a third party (including a subpoena, summons or discovery demand in litigation), you agree to hold CLA harmless should the privilege be determined not to apply to particular information or communications.

CLA will not disclose any confidential, proprietary, or privileged information of the entity to any persons without the authorization of entity management or unless required by law. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us.

Consent to send you publications and other materials

For your convenience, CLA produces a variety of publications, hard copy and electronic, to keep you informed about pertinent business and personal financial issues. This includes published articles, invitations to upcoming seminars, webinars and webcasts, newsletters, surveys, and press releases. To determine whether these materials may be of interest to you, CLA will need to use your federal Form 990 and state filings information. Such

information includes the organization name and address as well as the business and financial information you provided to us.

By signing and dating this engagement letter, you authorize CLA to use the information that you provide to CLA during the preparation of your federal Form 990 and state filings to determine whether to offer you relevant materials. Your consent is valid until further notice. If you do not wish to authorize such use, please strike out this paragraph prior to signing the engagement letter.

Consent to use tax information for benchmarking analyses

In an effort to better serve the needs of our clients, we develop a variety of benchmark, performance indicator, and predictive analysis reports, using anonymized client data obtained from our audit, tax, and other engagements. Business and financial information that you provide to us may be combined with information from other clients and included within the aggregated data that we use in these reports. While some of these analytical reports will be published and released publicly, please be assured that the separate information that we obtain from you will remain confidential, as required by the AICPA Code of Professional Conduct.

Unless authorized by law or the client consents, we cannot use a client's tax return information for purposes other than the preparation and filing of the client's tax return. By signing and dating this engagement letter, you authorize CLA to use any and all information furnished to CLA for or in connection with the preparation of the tax returns under this engagement letter, for a period of up to six (6) years from the date of this engagement letter, in connection with CLA's preparation of the types of reports described in the foregoing paragraph. If you do not wish to authorize such use, please strike out this section prior to signing the engagement letter.

Limitations

You agree that it is appropriate to limit the liability of CLA, its partners, principals, directors, officers, employees, and agents (each a "CLA party") and that this limitation of remedies provision is governed by the laws of the state of Minnesota, without giving effect to choice of law principles.

The exclusive remedy available to you shall be the right to pursue claims for actual damages that are directly caused by acts or omissions that are breaches by a CLA party of our duties owed under this engagement agreement, but any recovery on any such claim shall not exceed the portion of the total fees actually paid by you to CLA that corresponds to the particular service(s) that give(s) rise to the claim (i.e., the specific service(s) that a CLA party performed in such a manner as to cause CLA to be liable to you).

The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any dispute that may arise between you and any CLA party. The parties (you and CLA) agree that, notwithstanding any statute or law of limitations that might otherwise apply to a dispute, including one arising out of this agreement or the services performed under this agreement, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any action or legal proceeding by you against any CLA party must be commenced as provided below, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery. An action to recover on a dispute shall be commenced within the shorter of these periods ("Limitation Period"):

- For federal Form 990 and state filing preparation, separately within thirty-six (36) months after the date when we deliver the tax returns and filings under this agreement to you on which the dispute is based, regardless of whether any CLA party provides other services for you or relating to said returns and filings.
- For tax consulting engagements, separately within thirty-six (36) months from the date of our last billing for services on each consultation on which the dispute is based.
- For all tax return, state filing, and tax consulting engagements, within twelve (12) months from the date when you terminate this or any other engagement of our services.

The applicable Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a dispute.

Fees

Our professional fees will be billed based on the time involved and skills required. We will also bill for expenses (including internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees billed. Fees and expenses for this work will be invoiced separately. Our invoices, including applicable state and local taxes, will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 30 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed even if we have not issued the tax returns and filings. You will be obligated to compensate us for all time expended and related fees and to reimburse us for all out-of-pocket expenditures through the date of termination.

Other fees

You also agree to compensate us for any time and expenses, including time and expenses of legal counsel, we may incur in responding to discovery requests or participating as a witness or otherwise in any legal, regulatory, or other proceedings that we are asked to respond to on your behalf.

Finance charges and collection expenses

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

Termination of agreement

Either party may terminate this agreement at any time by giving written notice to the other party. In that event, the provisions of this agreement shall continue to apply to all services rendered prior to termination.

Agreement

Please sign and date this letter to confirm your agreement and return it to us at your earliest convenience.

We are looking forward to working with you.

Sincerely,

CliftonLarsonAllen LLP



Taylor Ulrich
Signing Director-In-Charge
626-857-7300
Lili.Huang@claconnect.com - Taylor U

Enclosure

Response:

This letter correctly sets forth the understanding of Peak Prep Pleasant Valley Charter School.

Authorized governance signature: _____

Title: _____

Date: _____

Authorized management signature: _____

Title: _____

Date: _____



CliftonLarsonAllen LLP
2210 East Route 66
Glendora, CA 91740
626.857.7300 | fax 626.857.7302
CLAconnect.com

March 30, 2021

Board of Directors and Management
Peak Prep Pleasant Valley Charter School
2150 Pickwick Drive, Suite 304
Camarillo, CA 93010

Dear Members of the Board and Management:

We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the audit and nonaudit services CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") will provide for Peak Prep Pleasant Valley Charter School ("you," "your," or "the Organization") for the year ended June 30, 2021.

Taylor Ulrich is responsible for the performance of the audit engagement. Per Education Code Section 41020(f)(2), there is a limit of six consecutive year for any firm where the principal/director-in-charge of the audit and the reviewing principal/director have been the same in each of those years. This is the first consecutive year Taylor Ulrich will be the engagement director-in-charge.

Audit services

We will audit the financial statements of the Organization, which comprise the statement of financial position as of June 30, 2021, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

We will also evaluate and report on the presentation of the supplementary information accompanying the financial statements in relation to the financial statements as a whole.

Nonaudit services

We will also provide the following nonaudit services:

- Preparation of your financial statements and related notes.
- Preparation of adjusting journal entries.
- Preparation of the informational tax return.

Audit objectives

The objective of our audit is the expression of an opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP). Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS), the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2020-2021 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel. Our audit will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion. We will also perform procedures to enable us to express an opinion on whether the supplementary information (as identified above) accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

We will issue a written report upon completion of our audit of your financial statements. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph(s), or withdraw from the engagement. If our opinion on the financial statements is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

We will also provide a report (which does not include an opinion) on internal control related to the financial statements and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*. The report on internal control over financial reporting and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the entity is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

We also will issue a written report and opinion on State Compliance upon completion of our audit.

Auditor responsibilities, procedures, and limitations

We will conduct our audit in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards*. Those standards require that we plan and perform the audit to obtain

reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error. An audit involves performing procedures to obtain sufficient appropriate audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS and *Government Auditing Standards*. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected. Because the determination of waste and abuse is subjective, Government Auditing Standards do not require auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential.

In making our risk assessments, we consider internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards and *Government Auditing Standards*.

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the entity's compliance with the provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

We will include in our report on internal control over financial reporting and compliance relevant information about any fraud; noncompliance with provisions of laws, regulations, contracts, or grant agreements; or abuse that may have occurred that are required to be communicated under *Government Auditing Standards*.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Management responsibilities

Our audit will be conducted on the basis that you (management and, when appropriate, those charged with governance) acknowledge and understand that you have certain responsibilities that are fundamental to the conduct of an audit.

You are responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP. Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design, implementation, and maintenance of effective internal control, including evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error; and that there is reasonable assurance that government programs are administered in compliance with compliance requirements. You are responsible for the design, implementation, and maintenance of internal controls to prevent and detect fraud; assessing the risk that the financial statements may be materially misstated as a result of fraud; and for informing us about all known or suspected fraud affecting the entity involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the entity received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for implementing systems designed to achieve compliance with applicable laws and regulations and the provisions of contracts and grant agreements; identifying and ensuring that the entity complies with applicable laws, regulations, contracts, and grant agreements; and informing us of all instances of identified or suspected noncompliance whose effects on the financial statements should be considered.

You are responsible for taking timely and appropriate steps to remedy any fraud; noncompliance with provisions of laws, regulations, contracts, or grant agreements; or abuse that we may report.

You are responsible for ensuring that management is reliable and for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, and other matters, and for the accuracy and completeness of that information, and for ensuring the information is reliable and properly reported; (2) additional information that we may request for the purpose of the audit; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence. You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

Management is responsible for the preparation of the supplementary information in accordance with U.S. GAAP. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. You agree to provide us written representations related to the presentation of the supplementary information.

Management is responsible for providing us with a written confirmation concerning representations made by you and your staff to us in connection with the audit. During our engagement, we will request information and explanations from you regarding, among other matters, the entity's activities, internal control, future plans, specific transactions, and accounting systems and procedures. The procedures we will perform during our engagement and the conclusions we reach as a basis for our report will be heavily influenced by the representations that we receive in the representation letter and otherwise from you. Accordingly, inaccurate, incomplete, or false representations could cause us to expend unnecessary effort or could cause a material fraud or error to go undetected by our procedures. In view of the foregoing, you agree that we shall not be responsible for any misstatements in the entity's financial statements that we may fail to detect as a result of misrepresentations made to us by you.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying for us previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the "Audit objectives" section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

Responsibilities and limitations related to nonaudit services

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management,

who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services.

The responsibilities and limitations related to the nonaudit services performed as part of this engagement are as follows:

- We will prepare a draft of your financial statements and related notes. Since the preparation and fair presentation of the financial statements is your responsibility, you will be required to acknowledge in the representation letter our assistance with preparation of the financial statements and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for those financial statements. You have a responsibility to be in a position in fact and appearance to make an informed judgment on those financial statements.
- We will propose adjusting journal entries as needed. You will be required to review and approve those entries and to understand the nature of the changes and their impact on the financial statements.
- We will prepare the organization's federal Form 990 and applicable state filings in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible. We will not audit or independently verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*.

Use of financial statements

The financial statements and our report thereon are for management's use. If you intend to reproduce and publish the financial statements and our report thereon, they must be reproduced in their entirety. Inclusion of the audited financial statements in a document, such as an annual report or an offering document, should be done only with our prior approval of the document. You are responsible to provide us the opportunity to review such documents before issuance.

If the parties (i.e., you and CLA) agree that CLA will not be involved with your official statements related to municipal securities filings or other offering documents, we will require that any official statements or other offering documents issued by you with which we are not involved clearly indicate that CLA is not involved with the contents of such documents. Such disclosure should read as follows:

CliftonLarsonAllen LLP, our independent auditor, has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. CliftonLarsonAllen LLP also has not performed any procedures relating to this offering document.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website or submitted on a regulator website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information in the electronic site with the original document.

We may issue preliminary draft financial statements to you for your review. Any preliminary draft financial statements should not be relied on or distributed.

Engagement administration and other matters

We expect to begin our audit in May 2021.

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. A list of information we expect to need for our audit and the dates required will be provided in a separate communication.

We will provide copies of our reports to the entity; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

We are available to perform additional procedures with regard to fraud detection and prevention, at your request, as a separate engagement, subject to completion of our normal engagement acceptance procedures. The terms and fees of such an engagement would be documented in a separate engagement letter.

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the regulator or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the regulator. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

CLA will not disclose any confidential, proprietary, or privileged information of the entity to any persons without the authorization of entity management or unless required by law. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such

affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us.

Professional standards require us to be independent with respect to you in the performance of these services. Any discussion that you have with our personnel regarding potential employment with you could impair our independence with respect to this engagement. Therefore, we request that you inform us prior to any such discussions so that we can implement appropriate safeguards to maintain our independence and objectivity. Further, any employment offers to any staff members working on this engagement without our prior knowledge may require substantial additional procedures to ensure our independence. You will be responsible for any additional costs incurred to perform these procedures.

Our relationship with you is limited to that described in this letter. As such, you understand and agree that we are acting solely as independent accountants. We are not acting in any way as a fiduciary or assuming any fiduciary responsibilities for you. We are not responsible for the preparation of any report to any governmental agency, or any other form, return, or report or for providing advice or any other service not specifically recited in this letter.

Our engagement and responsibility end on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific engagement letter for that service.

Government Auditing Standards require that we make our most recent external peer review report publicly available. The report is posted on our website at www.CLAconnect.com/Aboutus/.

Mediation

Any disagreement, controversy, or claim ("Dispute") that may arise out of any aspect of our services or relationship with you, including this engagement, shall be submitted to non-binding mediation by written notice ("Mediation Notice") to the other party. In mediation, we will work with you to resolve any differences voluntarily with the aid of an impartial mediator.

The mediation will be conducted as specified by the mediator and agreed upon by the parties. The parties agree to discuss their differences in good faith and to attempt, with the assistance of the mediator, to reach an amicable resolution of the Dispute.

Each party will bear its own costs in the mediation. The fees and expenses of the mediator will be shared equally by the parties.

Any Dispute will be governed by the laws of the state of Minnesota, without giving effect to choice of law principles.

Time limitation

The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any Dispute that may arise between the parties. The parties agree that, notwithstanding any statute or law of limitations that might otherwise apply to a Dispute, including one arising out of this agreement or the services performed under this agreement, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any

action or legal proceeding by you against us must be commenced within twenty-four (24) months ("Limitation Period") after the date when we deliver our final audit report under this agreement to you, regardless of whether we do other services for you relating to the audit report, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery.

The Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a Dispute.

Price Estimate

The price for these services will be based on the time involved and the degree of responsibility and skills required, plus expenses including internal and administrative charges. Based on our preliminary estimates, the price for the engagement is as follows:

Professional Services		Amount
Audit services*	\$	10,700
Informational tax return services	\$	2,200
Technology and client support fee	\$	650
Total	\$	13,550
* Should Federal Expenditures exceed \$750,000, a change in scope and fee will be required.		

Additional attendance and instructional minutes procedures related to distance learning will be billed as out-of-scope.

The price estimate is based on anticipated cooperation from your personnel and their assistance with preparing confirmations and requested schedules. If the requested items are not available on the dates required or are not accurate, the estimated price for services will likely be higher. If unexpected circumstances require significant additional time, we will advise you before undertaking work that would require a substantial increase in the fee estimate. Our invoices for our services will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed even if we have not issued our reports. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination. There is a ten percent withholding clause per Education Code 14505.

Technology Support Fee

Given the rising technology costs all organizations are expending to serve and protect client information, we are adding a 5% technology and client support fee to all of our invoices. The fee combines technology

expenses with client support costs and includes technology support, printing, communications, data security and storage, indirect engagement support costs and technical resource subscriptions. This is estimated and included in the fee table above.

Changes in engagement timing and assistance by your personnel

The fee estimate is based on anticipated cooperation from your personnel and their assistance with timely preparation of confirmations and requested schedules. If the requested items are not available on the dates required or are not accurate, we will advise management. Additional time and costs may be necessary because of such unanticipated delays. Examples of situations that may cause our estimated fee to increase include:

- Significant delays in responding to our requests for information such as reconciling variances or providing requested supporting documentation (e.g., invoices, contracts, and other documents)
- Rescheduling our fieldwork
- Schedule disruption caused by litigation, financial challenges (going concern), loan covenants (waivers), etc.
- Identifying a significant number of proposed audit adjustments
- Schedules prepared by your personnel that do not reconcile to the general ledger
- Numerous revisions to information and schedules provided by your personnel
- Restating financial statements for accounting errors in the prior year
- Lack of availability of entity personnel during audit fieldwork

Changes in accounting and audit standards

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the letter increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

Changes related to COVID-19

COVID-19 continues to have significant direct and indirect impacts on financial reporting, disclosure requirements, and the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in this letter increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

Other fees

You also agree to compensate us for any time and expenses, including time and expenses of legal counsel, we may incur in responding to discovery requests or participating as a witness or otherwise in any legal, regulatory, or other proceedings that we are asked to respond to on your behalf.

Finance charges and collection expenses

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage

rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

Subcontractors

CLA may, at times, use subcontractors to perform services under this agreement, and they may have access to your information and records. Any such subcontractors will be subject to the same restrictions on the use of such information and records as apply to CLA under this agreement.

Agreement

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. This letter constitutes the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA. If you have any questions, please let us know. Please sign and date this letter to indicate your acknowledgment and understanding of, and agreement with, the arrangements for our audit of your financial statements including the terms of our engagement and the parties' respective responsibilities.

Sincerely,

CliftonLarsonAllen LLP



Taylor Ulrich, CPA
Signing Director-In-Charge
626-857-7300
Taylor.Ulrich@claconnect.com

Response:

This letter correctly sets forth the understanding of Peak Prep Pleasant Valley Charter School.

Authorized governance signature: _____

Title: _____

Date: _____

Authorized management signature: _____

Title: _____

Date: _____