

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR

P.O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: APR 20

WATTS LEARNING CENTER FOUNDATION  
INC  
1100 WEST MANCHESTER AVENUE  
LOS ANGELES, CA 90044

Employer Identification Number:  
33-0768316

DLN:

17053365009008

Contact Person:

SUSAN PALADINI

ID# 95213

Contact Telephone Number:  
(916) 974-5430

Accounting Period Ending:  
June 30

Form 990 Required:  
Yes

Addendum Applies:  
No

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(ii).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

Letter 947 (DO/CG)

WATTS LEARNING CENTER FOUNDATION

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of Code sections 2055, 2106, and 2522.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

In the heading of this letter we have indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. If Yes is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 1 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete, so be sure your return is complete before you file it.

You are required to make your annual return available for public inspection for three years after the return is due. You are also required to make available a copy of your exemption application, any supporting documents, and this exemption letter. Failure to make these documents available for public inspection may subject you to a penalty of \$20 per day for each day there is a failure to comply (up to a maximum of \$10,000 in the case of an annual return).

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

WATTS LEARNING CENTER FOUNDATION

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

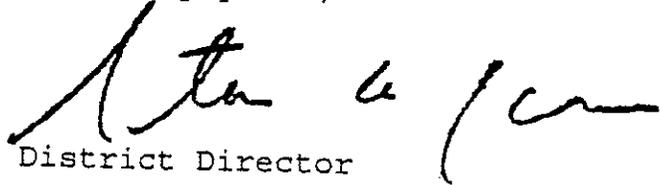
In accordance with section 508(a) of the Code, the effective date of this determination letter is September 5, 1997.

If we have indicated in the heading of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,



District Director

**Fiscal Policies and Procedures  
Handbook**

**WATTS LEARNING CENTER**

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# CHARTER SCHOOL FISCAL CONTROL POLICIES AND PROCEDURES

## OVERVIEW

The Governing Board of Watts Learning Center has reviewed and adopted the following policies and procedures to ensure the most effective use of the funds of WATTS LEARNING CENTER to support the mission and to ensure that the funds are budgeted, accounted for, expended, and maintained appropriately.

1. The Governing Board formulates financial policies and procedures, delegate's administration of the policies and procedures to the Executive Director and reviews operations and activities on a regular basis.
2. The Executive Director has responsibility for all operations and activities related to financial management.
3. Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
4. All administrative employees are required to take annual vacations of at least five (5) consecutive days.
5. All documentation related to financial matters will be completed by computer, word processor, typewriter, or ink.
6. The Governing Board will commission an annual financial audit by an independent third party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the charter-granting agency. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency.
7. The Governance Council can appoint someone else to perform the Executive Director's responsibilities in the case of absence.

### Annual Financial Audit

1. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year end (June 30<sup>th</sup>).
2. Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee.
3. The committee will annually contract for the services of an independent certified public accountant to perform an annual fiscal audit.
4. The audit shall include, but not be limited to:
  - a. An audit of the accuracy of the financial statements
  - b. An audit of the attendance accounting and revenue accuracy practices
  - c. An audit of the internal control practices

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**PURCHASING**

1. The Executive Director may authorize expenditures and the Board Chair will sign related contracts within the approved budget. The Governing Board must review all expenditures. This will be done via approval of a check register which lists all checks written during a set period of time and includes check #, payee, date, and amount. The Governing Board must also approve contracts over \$5,000.
2. The Executive Director must approve all purchases. Purchase requisitions, authorizing the purchase of items greater than \$500 (format to be provided by ExED), must be signed by the Executive Director and submitted to ExED with the related invoice.
3. When approving purchases, the Executive Director must:
  - a. Determine if the expenditure is budgeted
  - b. Determine if funds are currently available for expenditures (i.e. cash flow)
  - c. Determine if the expenditure is allowable under the appropriate revenue source
  - d. Determine if the expenditure is appropriate and consistent with the vision, approved charter, school policies and procedures, and any related laws or applicable regulations
  - e. Determine if the price is competitive and prudent. All purchases over \$5,000 must include documentation of a good faith effort to secure the lowest possible cost for comparable goods or services
4. Any individual making an authorized purchase on behalf of the school must provide ExED with appropriate documentation of the purchase.
5. Individuals other than those specified above are not authorized to make purchases without pre-approval.
6. Individuals who use personal funds to make unauthorized purchases will not be reimbursed. Authorized purchases will be promptly reimbursed by a bank check upon receipt of appropriate documentation of the purchase.
7. The Executive Director may authorize an individual to use a school credit card to make an authorized purchase on behalf of the school, consistent with guidelines provided by the Executive Director and/or Governing Board.
  - a. The school card will be kept under locked supervision in the Executive Director's office, and authorized individuals must sign the credit card out and must return the credit card and related documentation of all purchases within 24 hours of the purchases, unless otherwise authorized by the Executive Director.
  - b. If receipts are not available or are "missing", the individual making the charge will be held responsible for payment.
  - c. Credit cards will bear the names of both WATTS LEARNING CENTER and the Executive Director.
  - d. Debit cards are not allowed.

**Petty Cash**

1. The Office Manager or Principal will manage the petty cash fund.
2. The petty cash fund will be capped at \$350.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

3. All petty cash will be kept in a locked petty cash box in a locked drawer or file cabinet. Only the Office Manager or Principal and Executive Director will have keys to the petty cash box and drawer or file cabinet.
4. All disbursements will require a completed and signed petty cash slip. A register receipt for all purchases must be attached to the petty cash slip.
5. ExED will insure that the petty cash slip is properly completed and that a proper receipt is attached.
6. At all times the petty cash box will contain receipts and cash totaling \$350. A register receipt must support the petty cash slip. The individual using the petty cash to make a purchase is responsible for submitting the receipt for the petty cash slip to the Office Manager or Principal within 48 hours of withdrawing the petty cash.
7. When expenditures total \$200 (when cash balance is reduced to \$150), the Office Manager or Principal will total the disbursements, complete a petty cash reimbursement form, and obtain the approval of the Executive Director. This should be done on at least a quarterly basis. The petty cash slips and supporting receipts will be attached to the reimbursement request form and forwarded to ExED.
8. Petty cash fund reimbursement checks will be made payable to the Executive Director.
9. Any irregularities in the petty cash fund will be immediately reported in writing to the Executive Director.
10. Loans will not be made from the petty cash fund.
11. ExED will conduct surprise counts of the petty cash fund.

**Contracts**

1. Consideration will be made of in-house capabilities to accomplish services before contracting for them.
2. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000.
  - a. Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school.
3. Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors).
  - a. Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Board Chair may also require that contract service providers list the school as an additional insured.
4. If the contract service provider is a sole proprietor or a partnership (including LP, and LLP), the Office Manager will obtain a W-9 from the contract service provider prior to submitting any requests for payments to ExED.
5. The Board Chair will approve proposed contracts and modifications in writing.
6. Contract service providers will be paid in accordance with approved contracts as work is performed.
7. The Board Chair will be responsible for ensuring the terms of the contracts are fulfilled.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

8. Potential conflicts of interest will be disclosed upfront, and the Board Chair and/or Member(s) of the Governance Council with the conflict will excuse themselves from discussions and from voting on the contract.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**ACCOUNTS PAYABLE**

**Bank Check Authorization**

1. All original invoices will immediately be forwarded to the Executive Director for approval.
2. The Executive Director or designee will carefully review each invoice, attach all supporting documentation, and verify that the specified services and/or goods were received. When receiving tangible goods from a vendor, the person designated to receive deliveries should trace the merchandise to the packing list and note any items that were not in the shipment. The packing list should be submitted to ExED with the invoice. ExED will adjust the invoice for any missing items noted on the packing list before processing for payment.
3. Once approved by the Executive Director, he/she will stamp a check authorization on the invoice and complete the required information, including noting the specific budget line item that is to be charged for the specified expenditures. The invoice and supporting documentation will be sent to ExED on at least a weekly basis (Executive Director should be aware of invoice due dates to avoid late payments). ExED will then process the invoices with sufficient supporting documentation.
4. The Executive Director may authorize ExED to pay recurring expenses (e.g. utilities) without the Executive Director's formal approval (signature) on the invoice when dollar amounts fall within a predetermined range. A list of the vendors and the dollar range for each vendor must be provided to ExED in writing and updated on an annual basis.

**Bank Checks**

1. The Governance Council will approve, in advance, the list of authorized signers on the school account. The Executive Director, and any other individual authorized by the Governance Council may sign bank checks within established limitations.
2. The Governance Council will be authorized to open and close bank accounts.
3. ExED and the Executive Director will be responsible for all blank checks and will keep them under lock and key.
4. When there is a need to generate a bank check, the Executive Director will send appropriate approved documentation to ExED.
5. Once approved by the Executive Director, ExED types/writes the check based on the check authorization prior to obtaining the appropriate signature(s).
6. The Executive Director and a Board Member will co-sign checks in excess of \$2,500 for all **non-recurring** items. All checks less than \$2,500 require only the signature of the Executive Director.
7. Checks may not be written to cash, bearer, or petty cash. Under no circumstance will any individual sign a blank check.
8. ExED will record the check transaction(s) into the appropriate checkbook and in the general ledger.
9. ExED will distribute the checks and vouchers as follows:

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

- a. Original – mailed or delivered to payee
- b. Duplicate or voucher – attached to the invoice and filed by vendor name by an ExED accountant.
- c. Cancelled Checks – filed numerically with bank statements by an ExED accountant.
- d. Voided checks will have the signature line cut out and will have VOID written in ink. The original check will be attached to the duplicate and forwarded to ExED who will attach any other related documentation as appropriate.

**Bank Reconciliation**

1. Bank statements will be received directly, unopened, by the Vice President, Finance and Accounting at ExED assigned to the school.
2. ExED will examine all paid checks for date, name, cancellation, and endorsement. Any discrepancies regarding the paid checks or any checks over 90 days will be researched and if applicable deleted from the accounting system.
3. An ExED accountant will prepare the bank reconciliation, verifying the bank statements and facilitating any necessary reconciliation.
4. The ExED accountant will compare the reconciled bank balance to the cash in the bank account and to the general ledger, immediately reporting any material discrepancies to the Vice President, Finance and Accounting at ExED assigned to the school and the Executive Director.
5. The ExED accountant will prepare a monthly summary report to be approved by the Vice President, Finance and Accounting at ExED assigned to the school.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**ACCOUNTS RECEIVABLE**

1. Documentation will be maintained for accounts receivable and forwarded to ExED.
2. Accounts receivable will be recorded by ExED in the general ledger and collected on a timely basis.

**Cash Receipts (Cash and Checks)**

1. For each fundraising or other event in which cash or checks will be collected, a Volunteer Coordinator or a school employee will be designated, who will be responsible for collecting and holding all cash and checks for the purpose of the fundraising activity.
  - a. This designee will record each transaction in a receipt book at the time the transaction is made, with a copy of the receipt provided to the donor.
  - b. The cash, checks, receipt book, and deposit summary must be given to the school Office Manager or Principal by the end of the next school day, who will immediately put the funds in a secure, locked location.
  - c. Both the designee and the Office Manager or Principal will count the deposit and verify the amount of the funds in writing.
2. Cash/checks dropped off at the school office will be placed directly into a lock box by the person dropping off the cash/checks.
  - a. All funds are deposited into the lock box in a sealed envelope, along with any notes, forms, or other descriptions of how the funds are to be used.
  - b. The Office Manager or Principal and one other staff member will jointly open the lock box to verify the cash/check amounts, and sign off on the amounts received.
  - c. The lock box will be emptied at least two times per week, corresponding to days when deposits are made.
3. Cash/checks dropped off in the classroom will utilize the classroom clipboards. Each classroom has a designated clipboard hanging near the entrance to the classroom. Each morning, the homeroom teacher assigned to that classroom will collect all forms, payments, etc. that have been brought in by students that day, place them in a large envelope, and attach the envelope to the clipboard. Before lunchtime, an office staff member and a second staff member (who may be an office staff member or an aide) shall collect all clipboard envelopes from each classroom and bring them to the office, where they will be processed following the guidelines used for the lock box, above.
4. Mail received at the school must be opened in the presence of at least two office staff members.
  - a. For any cash or checks received in the mail, the Office Manager or other designee will prepare a deposit packet itemizing the amount, source, and purpose of each payment, with a designated office staff member counting the funds and verifying this in writing.
5. Twice a week, the Office Manager or other designee will log cash or checks received into the Cash Receipts Log. The Cash Receipt logs should be sent to ExED with the weekly mailing of invoices.
6. All checks will be immediately endorsed with the school deposit stamp, containing the following information: "For Deposit Only; WATTS LEARNING CENTER; Bank Name; Bank Account Number, Date Received by the School."

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

7. A deposit slip will be completed by the Office Manager or Executive Director and initialed by the Executive Director for approval to deposit. The deposit slip will be duplicated and documentation for all receipts (copy of check, letter, etc.) will be attached to the duplicate deposit slip.
8. Deposits totaling more than \$2,000 will be deposited within 24 hours by the designated school employee. Deposits totaling less than \$2,000 will be made weekly by the designated school employee. All cash will be immediately put into a lock box.
9. The duplicate deposit slip and deposit receipt will be attached to the deposit documentation and forwarded to ExED to be filed and recorded weekly.

**Volunteer Expenses**

1. All volunteers will submit a purchase requisition form to the Executive Director for all potential expenses.
  - a. Only items with prior written authorization from the Executive Director will be paid/reimbursed.

**Returned Check Policy**

1. A returned-check processing fee will be charged for checks returned as non-sufficient funds (NSF). Unless otherwise pre-approved by ExED or the Executive Director, payment of the NSF check and processing fee must be made by money order or certified check.
2. In the event that a second NSF check is received for any individual, in addition to the processing fee, the individual will lose check-writing privileges. Payment of the NSF check, the processing fee and any subsequent payment(s) by that individual must be made by money order or certified check.
3. In the case of NSF checks written by parents of students, failure to pay may result in the withholding of report cards/transcripts at the end of the semester and/or school year until payment is received, unless other mutually agreeable arrangements are approved by the Executive Director and/or Governing Board.
4. If unsuccessful in collecting funds owed, the school may initiate appropriate collection and/or legal action at the discretion of the Executive Director and/or Governing Board.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**PERSONNEL**

1. The Executive Director will be responsible for all new employees completing or providing all of the items on the attached Personnel File Checklist.
2. The Executive Director will be responsible for maintaining this information in the format as shown on the Personnel File Checklist.
3. An employee's hiring is not effective until the employment application, form W-4, form I-9, and health insurance forms have been completed.
4. A position control list will be developed during budget season. ExED will notify the board of any variances to the position control throughout the year.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**PAYROLL**

**Timesheets**

1. All classified employees will be responsible for completing a timesheet including vacation, sick, and holiday time (if applicable). The employee and the appropriate supervisor will sign the completed timesheet.
2. The completed timesheets will be submitted to ExED on the last working day of the designated payroll period.
3. Incomplete timesheets will be returned to the signatory supervisor and late timesheets will be held until the next pay period. No employee will be paid until a correctly completed timesheet is submitted.
4. If an employee is unexpectedly absent and therefore prevented from working the last day of the pay period or turning in the timesheet (such as an employee calling in sick), the employee is responsible for notifying the signatory supervisor or for making other arrangements for the timesheet to be submitted. However, the employee must still complete and submit the timesheet upon return.

**Overtime**

1. Advanced approval in writing by the authorized supervisor is required for compensatory time and overtime.
2. Overtime only applies to classified employees and is defined as hours works in excess of forty (40) hours within a five-day period of time. Any hours worked in excess of an employee's regular work schedule must be pre-approved by the supervisor, unless it is prompted by an emergency. No overtime will be paid without the approval of the employee's supervisor. Overtime will not be granted on a routine basis and is only reserved for extraordinary or unforeseen circumstances. If a supervisor identifies a recurring need for overtime in any given position, the supervisor should immediately consult with the Executive Director for further guidance.

**Payroll Processing**

1. For hourly employees, employees must sign timesheets to verify appropriate hours worked, resolve absences and compensations, and monitor number of hours worked versus budgeted. The Executive Director will approve these timesheets. No overtime hours should be listed on timesheets without the supervisor's initials next to the day on which overtime was worked. The signatory supervisor will submit a summary report of timesheets to ExED who will verify the calculations for accuracy [see attached sample].
2. For salaried employees, employees must sign into a log book to verify working days for accuracy. The Office Manager will provide the designated school employee with any payroll-related information such as sick leave, vacation pay, and/or any other unpaid time.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

3. For substitute teachers, the Office Manager will maintain a log of teacher absences and the respective substitutes that work for them. The Office Manager will verify that the substitutes initial the log next to their names before they leave for the day and that teachers, upon returning back to work, initial next to their names. This form will be verified and signed by the appropriate supervisor and submitted to ExED.
4. The Executive Director will notify ExED of all authorizations for approved stipends.
5. ExED will prepare the payroll worksheet based on the summary report from the designated school employee.
6. The payroll checks (if applicable) will be delivered to the school. The Executive Director will document receipt of the paychecks and review the payroll checks prior to distribution.

**Payroll Taxes and Filings**

1. ExED will prepare payroll check summaries, tax and withholding summaries, and other payroll tracking summaries.
2. ExED will prepare the state and federal quarterly and annual payroll tax forms, review the forms with the Executive Director, and submit the forms to the respective agencies.

**Record Keeping**

1. The designated school employee will maintain written records of all full time employees' use of sick leave, vacation pay, and any other unpaid time.
  - a. The designated school employee will immediately notify the Executive Director if an employee exceeds the accrued sick leave or vacation pay, or has any other unpaid absences.
  - b. Records will be reconciled when requested by the employee. Each employee must maintain personal contemporaneous records.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**EXPENSES**

**Expense Reports**

1. Employees will be reimbursed for expenditures within ten (10) days of presentation of appropriate documentation.
2. Employees will complete expense reports monthly, as necessary, to be submitted to Office Manager or Executive Director.
3. Receipts or other appropriate documentation will be required for all expenses over five dollars to be reimbursed.
4. The employee and the Executive Director must sign expense reports.
5. Executive Director's expense reports should be approved by a member of the board and always be submitted to for processing and payment
6. Expenses greater than two months old will not be reimbursed.

**Travel**

1. Employees will be reimbursed for mileage when pre-approved by an administrator. Mileage will be reimbursed at the government-mandated rate for the distance traveled, less the distance from the employee's residence to the school site for each direction traveled. For incidental travel, mileage will only be reimbursed if the one-way mileage exceeds 10 miles.
2. The Executive Director must pre-approve all out of town travel.
3. Employees will be reimbursed for overnight stays at hotels/motels when pre-approved by an administrator and the event is more than 50 miles from either the employee's residence or the school site. Hotel rates should be negotiated at the lowest level possible, including the corporate, nonprofit or government rate if offered, and the lowest rate available. Employees will be reimbursed at the established per diem rate for any breakfast, lunch, or dinner that is not included as part of the related event.
4. Travel advances require written approval from the Executive Director.
5. Travel advances require receipts for all advanced funds.
6. After the trip, the employee must enter all of the appropriate information on an expense report and submit it to the Executive Director for approval and then on to for processing.
7. If the advance exceeds the amount of the receipts, the employee will pay the difference immediately in the form of a check.
8. If the advance is less than the amount of the receipts, the difference will be reimbursed to the employee in accordance with the expense report.

**Governing Board Expenses**

1. The individual incurring authorized expenses while carrying out the duties of the school will complete and sign an expense report.
2. The Executive Director will approve and sign the expense report, and submit it to ExED for payment.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**Telephone Usage**

1. Employees will not make personal long distance calls on the telephones without prior approval from a supervisor.
2. Employees will reimburse the school for all personal telephone calls.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**FINANCE**

**Financial Reporting**

1. In consultation with the Executive Director, ExED will prepare the annual financial budget for approval by the Governing Board.
2. ExED will submit a monthly balance sheet and monthly revenue and expense summaries to the Executive Director including a review of the discretionary accounts and any line items that are substantially over or under budget (\$5,000 or +/- 10% of established budget, whichever is greater). The report will be reviewed at the scheduled board meeting and action will be taken, if appropriate.
3. ExED will provide the Executive Director and/or Governing Board with additional financial reports, as needed.

**Loans**

1. The Governing Board will approve all loans from third parties. In the case of a long-term loan, approval may also be required from the charter-granting agency in accordance with the terms of the charter petition and/or other lenders in accordance with the loan documents.
2. Once approved, a promissory note will be prepared and signed by the Board Chair before funds are borrowed.
3. Employee loans are not allowed.

**Financial Institutions**

1. All funds will be maintained at a high quality financial institution.
2. All funds will be maintained or invested in high quality, short maturity, and liquid funds.
3. Physical evidence will be maintained on-site for all financial institution transactions.

**Retention of Records**

1. Financial records, such as transaction ledgers, canceled/duplicate checks, attendance and entitlement records, payroll records, and any other necessary fiscal documentation will be retained for a minimum of seven (7) years. At the discretion of the Governing Board or Executive Director, certain documentation may be maintained for a longer period of time.
2. ExED will retain records at their site for a minimum of two (2) years; after which, the remaining five years will be the responsibility of the School.
3. Financial records will be shredded at the end of their retention period.
4. Appropriate back-up copies of electronic and paper documentation, including financial and attendance accounting data, will be regularly prepared and stored in a secure off-site location, separate from the school.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**RESERVES /INSURANCE/LIABILITIES/ASSETS**

**Funds Balance Reserve**

1. A funds balance reserve of at least 5% of the total unrestricted General Funds revenues will be maintained.
2. ExED will provide the Executive Director with balance sheets on a monthly basis. It is the responsibility of the Executive Director and the Governance Board to understand the school's cash situation. It is the responsibility of the Executive Director to prioritize payments as needed. The Executive Director has responsibility for all operations and activities related to financial management.

**Insurance**

1. ExED will work with the Executive Director to ensure that appropriate insurance is maintained at all times with a high quality insurance agency.
2. The Executive Director and will maintain the files of insurance policies, including an up-to-date copy of all certificates of insurance, insurance policies and procedures, and related claim forms.
3. The Executive Director and ExED will carefully review insurance policies on an annual basis, prior to renewal.
4. Insurance will include general liability, worker's compensation, student accident, professional liability, and directors' and officers' coverage. Supplementary coverage will cover the after-hours and weekend activities. Coverage will be in line with the limits listed in the school's approved charter petition.

**CHARTER SCHOOL  
FISCAL CONTROL POLICIES AND PROCEDURES**

**Asset Inventory**

1. An asset is defined as all items, purchased or donated, with a value of \$1,000 or more and with a useful life of more than one year.
2. ExED will file all receipts for purchased asset.
3. ExED will maintain an inventory or log of all assets. The log will include the original purchase price and date, a brief description, serial numbers, and other information appropriate for documenting assets.
4. ExED will take a physical inventory of all assets at least 90 days before the end of each fiscal year, indicating the condition and location of the asset.
5. The Executive Director will immediately be notified of all cases of theft, loss, damage or destruction of assets.
6. The Executive Director will submit to ExED written notification of plans for disposing of assets with a clear and complete description of the asset and the date of disposal.

**Parking Lot Liability**

1. Parking lot related incidences are not covered under any insurance policy. The school assumes no liability for damage to cars:
  - a. Parked in the parking lot during school hours
  - b. Parked in the parking lot after school hours
2. The only exception to this policy will be when a student is observed by an adult accidentally causing damage to a vehicle while engaged in a school activity, such as physical education equipment breaking a window (e.g. a ball)
3. Otherwise, liability is as follows:
  - a. If a student willfully causes damage (i.e. not an accident as described above), the student's parent or guardian is responsible.
  - b. If a parent or other visitor causes damage, that individual is responsible.
  - c. If an employee causes damage, the employee is responsible.
  - d. If an unknown person causes damage and there is no witness, the affected individual would determine if they have applicable coverage through his/her individual insurance policies.



**Watts Learning Center Foundation, Inc. Proposal for South Region Elementary School # 1**  
**Los Angeles Unified School District**  
**Single Plan for Student Achievement Accountability Matrix**

**High Academic Achievement Action Plan**

Accountabilities	LAUSD Target	Subgroup(s) _Socially/economically disadvantaged _Hispanic/Latino _African Americans	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/ or who is responsible for monitoring of the specific strategies/ activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>																																																				
<b>Increase the number of schools that meet or exceed their API targets</b> <u>2008-09</u> 282 out of 613 = 46%	10%																																																										
<b>Increase percentage of students in grades 2-11 scoring proficient or advanced on the CST in ELA and Math</b> <b>% Proficient/Advanced CST ELA by grade:</b> <table border="1" data-bbox="92 808 436 1128"> <thead> <tr> <th></th> <th><u>2008</u></th> <th><u>2009</u></th> <th></th> </tr> </thead> <tbody> <tr> <td><u>Change</u></td> <td></td> <td></td> <td></td> </tr> <tr> <td>District</td> <td>34%</td> <td>38%</td> <td>+4%</td> </tr> <tr> <td>Grade 2 –</td> <td>44%</td> <td>48%</td> <td>+4%</td> </tr> <tr> <td>Grade 3 –</td> <td>29%</td> <td>34%</td> <td>+5%</td> </tr> <tr> <td>Grade 4 –</td> <td>45%</td> <td>51%</td> <td>+6%</td> </tr> <tr> <td>Grade 5 –</td> <td>37%</td> <td>42%</td> <td>+5%</td> </tr> <tr> <td>Grade 6 –</td> <td>33%</td> <td>37%</td> <td>+4%</td> </tr> <tr> <td>Grade 7 –</td> <td>34%</td> <td>38%</td> <td>+4%</td> </tr> <tr> <td>Grade 8 –</td> <td>31%</td> <td>31%</td> <td>0%</td> </tr> <tr> <td>Grade 9 –</td> <td>31%</td> <td>32%</td> <td>+1%</td> </tr> <tr> <td>Grade 10 –</td> <td>29%</td> <td>31%</td> <td>+2%</td> </tr> <tr> <td>Grade 11 –</td> <td>27%</td> <td>31%</td> <td>+4%</td> </tr> </tbody> </table>		<u>2008</u>	<u>2009</u>		<u>Change</u>				District	34%	38%	+4%	Grade 2 –	44%	48%	+4%	Grade 3 –	29%	34%	+5%	Grade 4 –	45%	51%	+6%	Grade 5 –	37%	42%	+5%	Grade 6 –	33%	37%	+4%	Grade 7 –	34%	38%	+4%	Grade 8 –	31%	31%	0%	Grade 9 –	31%	32%	+1%	Grade 10 –	29%	31%	+2%	Grade 11 –	27%	31%	+4%	10%	All Students	___ Implement standards based instruction in all grade levels. ___ provide interventions for students not making adequate progress toward benchmarks.(RTI)—as assessed by progress monitoring and formative assessments. ___Improve performance in all subjects and reading comprehension on CST by increasing the amount of direct instruction in Tier 1 and Tier 2 words. Supports ELL & SEL. Instruction is beyond what core texts generally provide. ___Provide after school interventions for students not making adequate progress.	___Instructional Specialist will support teachers as they develop, deliver and assess standards based instruction. ___Staff development for techniques to teach vocabulary ___Support from instructional Specialist and resource teachers in planning interventions for some students.	Students 'on track' at the end of each grade or critical grade-level span in reading, writing, and mathematics  <b>Grades 2, 3, 4, 5/6:</b> Language Arts: • % of students at benchmark on the most recent fluency, vocabulary, and comprehension assessments  Writing: • Increase the # of students that receive a 3 or 4 based on standards/rubric on the writing periodic assessment  Math: Increase the # of students that are proficient on the mathematics periodic assessment by 6%	___Principal ___Instructional Specialist	Ongoing
	<u>2008</u>	<u>2009</u>																																																									
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<p><b>Increase the number of students identified as Gifted to a minimum of 6% of the school site's population.</b></p> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: center;"><u>07-08</u></td> <td style="text-align: center;"><u>08-09</u></td> <td style="text-align: center;"><u>Change</u></td> </tr> <tr> <td></td> <td style="text-align: center;">9.3%</td> <td style="text-align: center;">9.2%</td> <td style="text-align: center;">-.1%</td> </tr> </table> <p><b>Increase the total percentage of each site's African-American and Hispanic students identified as Gifted to a minimum of 6% of each subgroup's total population.</b></p> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: center;"><u>07-08</u></td> <td style="text-align: center;"><u>08-09</u></td> <td style="text-align: center;"><u>Change</u></td> </tr> <tr> <td>African Americans</td> <td style="text-align: center;">6.6%</td> <td style="text-align: center;">6.6%</td> <td style="text-align: center;">.0%</td> </tr> <tr> <td>Hispanics</td> <td style="text-align: center;">6.9%</td> <td style="text-align: center;">7.0%</td> <td style="text-align: center;">.1%</td> </tr> </table>		<u>07-08</u>	<u>08-09</u>	<u>Change</u>		9.3%	9.2%	-.1%		<u>07-08</u>	<u>08-09</u>	<u>Change</u>	African Americans	6.6%	6.6%	.0%	Hispanics	6.9%	7.0%	.1%	<p>varies by school 10%</p> <p>varies by school 10%</p>	<p>Latino &amp; African Americans</p>	<p><i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i></p> <p>___ Use CST, interest surveys, parent report, student work, and observations and other criteria to identify students who demonstrate intellect, talent, creativity and can benefit from an accelerated and enriched program.          ___ Cluster students in one classroom at each level.          ___ Implement a faster paced and more complex curriculum based on the standards.          ___ Provide opportunities for more collaboration &amp; independent work</p>	<p><i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i></p> <p>___ Support for teachers by the instructional specialist and principal          ___ School Psychologist for identification of students who may be highly gifted          ___ Instructional resources for special projects</p>	<p><i>Periodic Assessment</i>          See monitoring indicators from CST section below to increase the median API score.</p> <ul style="list-style-type: none"> <li>Number of state identified Gifted students</li> </ul>	<p>Who participates and/ or who is responsible for monitoring of the specific strategies/ activities and/or support?</p> <p>___ Instructional specialist          ___ Resource specialist          ___ Principal</p>	<p>Indicate when the strategy will be implemented and projected date of completion.</p> <p>Continuously</p>
	<u>07-08</u>	<u>08-09</u>	<u>Change</u>																								
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<p><b>Accelerate the performance for all African-American, Hispanic, Standard English Learners, and Students with Disabilities</b></p> <p><b>Prof/Adv CST ELA Subgroups:</b></p> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: center;"><u>07-08</u></td> <td style="text-align: center;"><u>08-09</u></td> <td style="text-align: center;"><u>Change</u></td> </tr> <tr> <td>African American</td> <td style="text-align: center;">25%</td> <td style="text-align: center;">27%</td> <td style="text-align: center;">+2%</td> </tr> <tr> <td>Hispanic</td> <td style="text-align: center;">31%</td> <td style="text-align: center;">33%</td> <td style="text-align: center;">+2%</td> </tr> <tr> <td>English Learners</td> <td style="text-align: center;">20%</td> <td style="text-align: center;">23%</td> <td style="text-align: center;">+3%</td> </tr> <tr> <td>Sts. w/ Disabilities</td> <td style="text-align: center;">11%</td> <td style="text-align: center;">12%</td> <td style="text-align: center;">+1%</td> </tr> </table>		<u>07-08</u>	<u>08-09</u>	<u>Change</u>	African American	25%	27%	+2%	Hispanic	31%	33%	+2%	English Learners	20%	23%	+3%	Sts. w/ Disabilities	11%	12%	+1%	<p>10%</p>	<p>___ African Americans          ___ Hispanic          ___ English Learners          ___ Sts. w/ disabilities</p>	<p>___ Implement standards based instruction in all grade levels.          ___ provide interventions for students not making adequate progress toward benchmarks.(RTI)—as assessed by progress monitoring and formative assessments.          ___ Improve performance in all subjects and reading comprehension on CST by increasing the amount of direct instruction in Tier 1 and Tier 2 words. Supports ELL &amp; SEL. Instruction is beyond what core texts generally provide.          ___ Provide after school interventions for students not making adequate progress.</p>		<ul style="list-style-type: none"> <li>See monitoring indicators for CST on page 34</li> </ul>		
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<p><b>Accelerate the performance of Standard English Learners (SEL)</b></p>	<p>10%</p>		<p>See above – We have found that excellent teaching from caring teachers really does accomplish the goal.</p>		<ul style="list-style-type: none"> <li>See monitoring indicators for on page 34</li> </ul>																						

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<b>AMAO 1 – Meet or exceed the percentage of English Learners making annual progress in learning English</b>  <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>54.8%</td> <td>55.7%</td> <td>+0.9%</td> </tr> </table> 2007-2008 State Target was 50.1% 2008-2009 State Target was 51.6% 2009-2010 State Target is 53.1%	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	54.8%	55.7%	+0.9%	3%	ELL Students	__ Review & analyze CELDT scores __ ELD will be taught 30 to 45 minutes daily by qualified teachers. __ Monitor progress using District's ELD portfolio __ ELs will receive standards-based reading instruction __ SDAIE & sheltered English used to provide equal access to core subjects. __ Provide after school intervention for students needing more support.	__ Bilingual coordinator to support teachers & monitor the process.	__ The percentage of students reclassified annually is 20% based on portfolios, CELDT or CST. __ 75% of students progress at least 1 ELD level each year. • CELDT • ELSSA Data	Principal Bilingual Coordinator	Ongoing			
<u>07-08</u>	<u>08-09</u>	<u>Change</u>														
54.8%	55.7%	+0.9%														
<b>AMAO 2 – Meet or exceed the percentage of English Learners scoring early advanced and advanced on the CELDT</b>  % Early Adv/Adv <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>36.3%</td> <td>39.3%</td> <td>+3%</td> </tr> </table> 2008-2009 State Target was 30.6% 2009-2010 State Target is 32.2%	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	36.3%	39.3%	+3%	5%		__ Teach students to retell stories and paraphrase informational text .__ Use more oral language in the where students are supported in talking about what they learn __ Make verbal rehearsal and small group discussions an integral part of all lessons. __ Guide and support students in oral composing before writing drafts.	_ Bilingual coordinator to support teachers & monitor the process. __ Professional development for teachers on the integration of oral language in lessons.	• See monitoring indicators for AMAO 1					
<u>07-08</u>	<u>08-09</u>	<u>Change</u>														
36.3%	39.3%	+3%														
<b>AMAO 3 – Meet or exceed the percentage of English Learners scoring proficient or advanced on the CST</b>  <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>24.3</td> <td>27.0</td> <td>+2.7%</td> </tr> <tr> <td>34.1</td> <td>36.3</td> <td>+2.1%</td> </tr> </table> ELA Math	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	24.3	27.0	+2.7%	34.1	36.3	+2.1%			__ Implement standards based instruction in all grade levels. __ provide interventions for students not making adequate progress toward benchmarks.(RTI)—as assessed by progress monitoring and formative assessments. __Improve performance in all subjects and reading comprehension on CST by increasing the amount of direct instruction in Tier 1 and Tier 2 words. Supports ELL & SEL. Instruction is beyond what core texts generally provide. __Provide after school interventions for students not making adequate progress.				
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<p><b>Increase EL reclassification rates at the elementary, middle, and high school levels</b></p> <table border="1"> <thead> <tr> <th></th> <th><u>07-08</u></th> <th><u>08-09</u></th> <th><u>Change</u></th> </tr> </thead> <tbody> <tr> <td>EL</td> <td>13.5</td> <td>15.8</td> <td>+2.3</td> </tr> <tr> <td>MS</td> <td>22.4</td> <td>20.8</td> <td>+8.4</td> </tr> <tr> <td>HS</td> <td>10.3</td> <td>12.4</td> <td>+2.1</td> </tr> </tbody> </table>		<u>07-08</u>	<u>08-09</u>	<u>Change</u>	EL	13.5	15.8	+2.3	MS	22.4	20.8	+8.4	HS	10.3	12.4	+2.1	5%		<p>__ Review &amp; analyze CELDT scores          __ ELD will be taught 30 to 45 minutes daily by qualified teachers.          __ Monitor progress using District's ELD portfolio          __ ELs will receive standards-based reading instruction          __ SDAIE &amp; sheltered English used to provide equal access to core subjects.          __ Provide after school intervention for students needing more support.</p>		<ul style="list-style-type: none"> <li>• EL monitoring rosters, and where possible EL students not moving or reclassifying</li> <li>• RFEP Monitoring Rosters</li> </ul>		
	<u>07-08</u>	<u>08-09</u>	<u>Change</u>																				
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<p><b>Increase the percentage of SWD performing at Basic and beyond on the ELA and Math CSTs</b></p> <table border="1"> <thead> <tr> <th></th> <th><u>07-08</u></th> <th><u>08-09</u></th> <th><u>Change</u></th> </tr> </thead> <tbody> <tr> <td>ELA</td> <td>25%</td> <td>27%</td> <td>+2%</td> </tr> <tr> <td>MATH</td> <td>26%</td> <td>27%</td> <td>+1%</td> </tr> </tbody> </table>		<u>07-08</u>	<u>08-09</u>	<u>Change</u>	ELA	25%	27%	+2%	MATH	26%	27%	+1%	35% ELA 35% Math		<p>Implement standards based instruction in with appropriate pacing and modifications.          __ provide interventions for students not making adequate progress toward benchmarks.(RTI)—as assessed by progress monitoring and formative assessments.          __Improve performance in all subjects and reading comprehension on CST by increasing the amount of direct instruction in Tier 1 and Tier 2 words. Supports ELL &amp; SEL. Instruction is beyond what core texts generally provide.          __Provide after school interventions for students not making adequate progress.</p>		<ul style="list-style-type: none"> <li>• See monitoring indicators for CST on page 34</li> </ul>						
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(Name) School

Los Angeles Unified School District  
Single Plan for Student Achievement Accountability Matrix

Graduation Rate

Accountabilities	LAUSD Target	Subgroup(s) <i>List the subgroups.</i>	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/or who is responsible for monitoring of the specific strategies/activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>						
<p><b>Graduation rate will increase</b></p> <table border="0"> <tr> <td><u>06-07</u></td> <td><u>07-08</u></td> <td><u>Change</u></td> </tr> <tr> <td>67.1%</td> <td>72.4%</td> <td>+5.3%</td> </tr> </table>	<u>06-07</u>	<u>07-08</u>	<u>Change</u>	67.1%	72.4%	+5.3%	8%				<ul style="list-style-type: none"> <li>• Increase graduation rate by subgroups (e.g. ELs, AA, Latino/Hispanic)</li> <li>• Decrease rate of drop-outs</li> <li>• Increase the percentage of 9<sup>th</sup> to 10<sup>th</sup> grade students accumulating 55 credits</li> <li>• 4-year longitudinal graduation rate (9<sup>th</sup> grade to graduation)</li> </ul>		
<u>06-07</u>	<u>07-08</u>	<u>Change</u>											
67.1%	72.4%	+5.3%											
<p><b>Increase percent of 10th graders passing both parts of CAHSEE on the first attempt</b></p> <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>57%</td> <td>60%</td> <td>+3%</td> </tr> </table>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	57%	60%	+3%	6%				<ul style="list-style-type: none"> <li>• Increased participation in CAHSEE preparation</li> </ul>		
<u>07-08</u>	<u>08-09</u>	<u>Change</u>											
57%	60%	+3%											
<p><b>Dropout rate will decrease.</b></p> <table border="0"> <tr> <td><u>06-07</u></td> <td><u>07-08</u></td> <td><u>Change</u></td> </tr> <tr> <td>31.7%</td> <td>26.4%</td> <td>-5.3%</td> </tr> </table>	<u>06-07</u>	<u>07-08</u>	<u>Change</u>	31.7%	26.4%	-5.3%	6%				<p>Monitor students at risk:</p> <ul style="list-style-type: none"> <li>• 85% of students are in attendance for 96% or more of the time</li> <li>• Increase in pass rates in English and/or math courses</li> <li>• Increase in number of students receiving an E or S in Work Habits or Cooperation</li> <li>• Increase attendance rates for both students and teachers to 96%.</li> </ul>		
<u>06-07</u>	<u>07-08</u>	<u>Change</u>											
31.7%	26.4%	-5.3%											

(Name) School

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Single Plan for Student Achievement Accountability Matrix

Personalization/College Career Ready

Accountabilities	LAUSD Target	Subgroup(s) <i>List the subgroups.</i>	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/or who is responsible for monitoring of the specific strategies/activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>												
<p><b>Increase in the number of students graduating having completed A-G requirements, and thus having their choice of a Career Pathway.</b></p> <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>25%</td> <td>TBD%</td> <td>+__%</td> </tr> </table>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	25%	TBD%	+__%	80%				<p>A-G enrollment and passing rates</p> <ul style="list-style-type: none"> <li>Decrease the number of students receiving Fails in A-G courses by 10%.</li> <li>Increase the percent of students earning C's or higher in A-G courses.</li> </ul>								
<u>07-08</u>	<u>08-09</u>	<u>Change</u>																	
25%	TBD%	+__%																	
<p><b>Increase the enrollment in Advanced Placement course</b></p> <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>1.8%</td> <td>1.9%</td> <td>+ .1%</td> </tr> </table> <p><b>Increase pass rates on AP tests</b></p> <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>44.1%</td> <td>TBD%</td> <td>+TBD%</td> </tr> </table>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	1.8%	1.9%	+ .1%	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	44.1%	TBD%	+TBD%	5%  5%				<p>Advanced Placement courses –</p> <ul style="list-style-type: none"> <li>Increase Advanced Placement offerings at all high schools.</li> <li>Increase the number of tests administered by 10%</li> <li>Increase the number of subject matter tests administered by:               <ul style="list-style-type: none"> <li>At least 2 (if the school administers less than 15 subject matter tests)</li> <li>At least 1 (if the school administers less than 20 subject matter tests)</li> </ul> </li> </ul>		
<u>07-08</u>	<u>08-09</u>	<u>Change</u>																	
1.8%	1.9%	+ .1%																	
<u>07-08</u>	<u>08-09</u>	<u>Change</u>																	
44.1%	TBD%	+TBD%																	
<p><b>Increase students preparedness for College Career Readiness</b></p>					<p><u>Middle Schools</u></p> <ul style="list-style-type: none"> <li>Students passing core classes with C or better</li> </ul> <p><u>Elementary</u></p> <ul style="list-style-type: none"> <li>Students getting 3 or 4 on report cards</li> </ul>														

(Name) School

Los Angeles Unified School District  
Single Plan for Student Achievement Accountability Matrix

Parent and Community Engagement

Accountabilities	LAUSD Target	Subgroup(s) <i>List the subgroups.</i>	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/or who is responsible for monitoring of the specific strategies/activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>
<p>As indicated on the annual School Experience Survey for parents (School Report Card), the majority of parents “strongly agree” or “agree” that</p> <ul style="list-style-type: none"> <li>• there are opportunities for parent involvement</li> <li>• they feel welcome at this school</li> <li>• there is a high level of reported involvement at the school, as indicated on the annual School Experience Survey for Parents (School Report Card).</li> </ul>	<p>At least 90% of parents respond “Strongly agree” or “agree”</p>	<p>ALL</p>	<p>___ Provide many opportunities for parents to participate in activities that directly support their child related to their class.            ___ Greeting by staff especially school office is friendly and attitude is positive.            ___ Provide opportunities for parents to learn more about the curriculum and how they can support their child.            ___ Provide referrals to community services            ___ Welcome extended families to meetings            ___ Translate all materials sent home.            ___ Use a bilingual phone system.            ___ Provide interpreters for all meetings.            ___ Host math and family literacy nights.</p>	<p>___ Bilingual office staff            ___ Refreshments for meetings            ___ Translation service and equipment            ___ Materials – books and games for family math and literacy nights.</p>	<ul style="list-style-type: none"> <li>• <b>Increased response rates</b> – every school should be at a rate of 40% of selected parents returning surveys in 2009-10.</li> <li>• <b>Welcoming environment and opportunities to participate</b> – every elementary school should be at 90% in 2009-10. Every secondary school should be at 80%.</li> <li>• <b>Parent home involvement</b> should be at 90% for elementary schools and 80% for secondary schools in 2009-10. <b>School involvement</b> should be at 70% for elementary schools and at 50% for secondary schools in 2009-10.</li> <li>• <b>Parent centers</b> – for schools that have accepted funding for parent centers, parent center awareness and participation should be at 80% in 2009-10.</li> <li>• <b>Communication</b> – Communication should be at 90% for elementary schools and 80% for secondary schools in 2009-10.</li> </ul>	<p>___Principal            ___Parent            Community Coordinator            ___Operations manager</p>	<p>Twice Yearly on a continuous basis</p>

(Name) School

**Los Angeles Unified School District  
Single Plan for Student Achievement Accountability Matrix**

**Safe Schools**

Accountabilities	LAUSD Target	Subgroup(s) <i>List the subgroups.</i>	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/or who is responsible for monitoring of the specific strategies/activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>									
<p><b>The majority of students “strongly agree” or “agree” that they feel safe in their school as indicated on the annual School Experience Survey for Students (School Report Card)</b></p>	<p>At least 90% of students respond “strongly agree” or agree</p>		<p>__ Parents review and sign the School/Parent compact when their child is enrolled.            __ Implement Responsive Classroom approach –First 6 weeks of school when clear expectations for behavior and classroom &amp; school culture or developed.            __ Implement Morning Meeting schoolwide to insure all students feel connected.            __ Implement a school wide discipline plan.            __ Provide adequate supervision before and after school, and during recess and lunch.            __ Train and supervise individuals who provide supervision            __ Provide excellent instruction so that all students are successful and love their school.</p>	<p>__ Staff development Kit for Morning Meeting &amp; additional books.            __ 5 Noon Duty Aides            __ security services            __ fingerprinting for parents who volunteer to provide schoolwide supervision.</p>	<ul style="list-style-type: none"> <li>• Increased and improved parent partnerships and welcoming environments</li> <li>• Increased external partnerships to support instructional incentives and parent participation support</li> <li>• Increased clear and accurate, updated communication regarding school policy and procedures, between school and home</li> <li>• Increased clear and accurate, updated communication regarding school policy and procedures, between school and home</li> </ul>											
<p><b>Decrease the number of suspensions</b></p> <table border="0"> <tr> <td><u>06-07</u></td> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>83,542</td> <td>75,049</td> <td>TBD</td> <td>TBD</td> </tr> </table>	<u>06-07</u>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	83,542	75,049	TBD	TBD	<p>25%</p>		<p>__ Conduct evaluations and provide interventions for students who are habitually referred for serious offenses – fighting, destroying property.            __ Conference with parents about behavior            __ Provide counseling services            __ Develop behavior plans which are implemented by the teacher, counselor and other staff.</p>	<p>__ School counselor</p>	<ul style="list-style-type: none"> <li>• Decrease non-mandatory suspension rates at all schools by 25%.</li> <li>• Increase the number of preventive school-wide discipline plans that are effectively implemented</li> <li>• Team Implementation Checklist</li> <li>• Increase use of Discipline Policy Rubric of Implementation by Support Staff for all cohort schools</li> </ul>			
<u>06-07</u>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>													
83,542	75,049	TBD	TBD													
<p><b>Increase attendance of staff and students</b></p> <table border="0"> <tr> <td><u>07-08</u></td> <td><u>08-09</u></td> <td><u>Change</u></td> </tr> <tr> <td>Students: 93.99%</td> <td>TBD</td> <td>TBD</td> </tr> <tr> <td>Staff: 93%</td> <td>TBD</td> <td>TBD</td> </tr> </table>	<u>07-08</u>	<u>08-09</u>	<u>Change</u>	Students: 93.99%	TBD	TBD	Staff: 93%	TBD	TBD	<p>96% 96%</p>		<p>__ All staff commits to regular attendance as a part of their employment agreement.            __ Celebrate and appreciate student and staff who meet or exceed the attendance goals.</p>	<p>__ Treats and awards for incentives</p>	<ul style="list-style-type: none"> <li>• Increase attendance incentives/rewards systems</li> <li>• School-wide recognition</li> <li>• Increase attendance incentives/rewards systems</li> <li>• School-wide recognition</li> </ul>		
<u>07-08</u>	<u>08-09</u>	<u>Change</u>														
Students: 93.99%	TBD	TBD														
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**(Name) School**

**Los Angeles Unified School District  
Single Plan for Student Achievement Accountability Matrix**

**Safe Schools**

(Name) School

Los Angeles Unified School District  
Single Plan for Student Achievement Accountability Matrix

School Organization/Support Services

Accountabilities	LAUSD Target	Subgroup(s) <i>List the subgroups.</i>	Strategies/Activities <i>Identify strategies/activities that will improve English Language Development (ELD), English Language Arts (ELA), Mathematics, Science, and Social Studies. Describe the supplemental intervention services provided before, during, and after the school day for students not meeting grade level standards. Include support personnel that will assist in implementing these strategies/activities.</i>	Resources/Proposed Funding Sources <i>Identify the resources needed to implement the strategies, activities, and/or support described in the left hand column.</i>	Means of Evaluating Progress <i>Periodic Assessment See monitoring indicators from CST section below to increase the median API score.</i>	Staff Responsible <i>Who participates and/or who is responsible for monitoring of the specific strategies/activities and/or support?</i>	Start/Completion Date <i>Indicate when the strategy will be implemented and projected date of completion.</i>
Increase in the number of Title 1 Schools meeting AYP for two consecutive years					<ul style="list-style-type: none"> <li>• Schools meet CST annual measurable objective targets or</li> <li>• Decrease by at least 10 percent the percentage of students performing below proficient level in either ELA or math from the preceding school year</li> <li>• Schools meet or exceed 95% participation rate</li> <li>• Schools meet or exceed API target</li> <li>• Schools meet or exceed graduation rate target</li> </ul>		
Decrease in the number of Title 1 Schools In PI status					<ul style="list-style-type: none"> <li>• Schools meet CST annual measurable objective targets or</li> <li>• Decrease by at least 10 percent the percentage of students performing below proficient level in either ELA or math from the preceding school year</li> <li>• Schools meet or exceed 95% participation rate</li> <li>• Schools meet or exceed API target</li> <li>• Schools meet or exceed graduation rate target</li> </ul>		
Increase in the number of QEIA schools meeting annual targets					<ul style="list-style-type: none"> <li>• 2/3 implementation of Class Size Reduction target</li> <li>• 2/3 implementation of 300:1 student to counselor ratio.</li> </ul>		

## **JOB DESCRIPTION: PRINCIPAL**

### **PARENTS & COMMUNITY**

- Participation: Break down barriers between home and school by encouraging and assisting the parent's participation in their students' social and academic education
  - Oversee parent education classes
  - 2.0 meetings
  - Coordinate monthly parent 2 parent meetings
  - Oversee and facilitate other parent communications/events as needed
  - Facilitate, mediate, and encourage teacher parent communication
  - Handle and follow up with parent complaints
  - Ensure parents are invited to school events
- Communication: communicate school policies, vision and mission
  - New Student Orientation meetings
  - Transfer Student Intake meetings
  - Open House and recruitment presentations
  - Tour parents and guests around campus
  - 4<sup>th</sup> SRC meeting
  - Support publicity and outreach events as a speaker or text provider

### **FACULTY**

- Hiring a staff qualified to meet the mission of the school
  - Teaching and administrative positions
    - Post vacancies
    - Pre-screen candidates
    - Credential compliance
    - Conduct secondary screening and campus tours
    - Coordinate observation and interview panel and process
    - Use committee input for final decision making
  - Supervise aide hiring and review
    - Participate as a committee member when requested
    - Consult on decisions made by department/program head
  - Manage contracts, pay scales, benefits and incentives
- Lead, deliver and facilitate staff development and training, to maximize the team's potential to deliver the mission of the school most effectively.
  - Mentor and train new teachers
  - Teacher coaching
  - BTSA
  - National Board Coaching and program oversight
  - Student teachers
  - Coordinate SD schedules and programs
  - Implement grant related programming
  - Teacher portfolios
- Supervision, coaching and evaluation of staff members along with ED.

1/17/2010

- Teachers
- Administrative team including the Assistant Principals, office staff, and other support staff
- team leaders (special ed, AVID, grade level or subject area chairs)
- tutors

### **STUDENTS**

- Oversee academic progress—what is the formal process? How are you doing this
- Discipline
  - Oversight of process
  - Supervise SRC coordinator
  - Accountability for process and decisions
  - Assist teachers with implementation and interventions
  - Meet with parents at SRC 4
  - Present cases at board hearings
  - Oversee counseling program
- Work with students and teachers to resolve conflicts and gain understanding
- Attendance and enrollment—what is the process
  - Oversee attendance rates and incentives
  - Follow up with students with attendance concerns
  - Hear attendance appeals
  - Conduct student check-out meetings

### **CURRICULUM & PROGRAMS**

- Oversee curriculum development and alignment
- Connect professional development to curriculum needs
- Oversee, development and implementation of school assessment plan
- Supervise development of use and data to inform instruction
- Advisory/Portfolios
  - Coordinate implementation and design team
  - Distribute materials and information as needed
  - Evaluation of program implementation
- Summer School
- Intersession
- Special Education
  - Oversee implementation of accommodations and modifications in the regular education classroom
  - Accountability for implementation of policies and programming
  - Supervise and coach Special Education Coordinator
  - Liaison with SELPA
  - LEA representative in IEP's and other meetings
- Write curricular and academic implementation pieces for grants

### **STRATEGIC**

- Oversee curriculum, program development and alignment
- Facilitate design of academic objectives and measure along with ED

1/17/2010

- Evaluation and measurement of objectives and programs
- Manage strategies to reach and maintain desired enrollment and waitlist
- Implementation of WASC Action Plan

**Other school activities and duties as assigned or needed**

**PSC-Watts Learning Center Foundation, Inc**

<b>Professional Development Objectives/Goals</b>	
<p align="center"><b>Learn about the New School</b></p> <p align="center"><b>Create a Positive Learning Environment</b></p> <ol style="list-style-type: none"> <li>1. Use Morning Meeting protocols to build classroom and school-wide community.</li> <li>2. Implement the procedures in the First Six Weeks of School. Detailed guidelines for:               <ul style="list-style-type: none"> <li>— Building community</li> <li>— Creating rules and teaching routines</li> <li>— Introducing engaging curriculum</li> <li>— Fostering autonomy</li> <li>— Integrating social and academic learning</li> <li>— Establishing high expectations for learning and behavior</li> </ul> </li> <li>3. Implement the schoolwide discipline plan</li> </ol>	<p align="center"><b>Knowledge of Content Standards</b></p> <ol style="list-style-type: none"> <li>1. Identify content, vocabulary, concepts, and skills related to the standards in language arts, math, Science &amp; Social Studies.</li> <li>2. Identify content, vocabulary, concepts, and skills related to the standards in language arts, math, science, and social science.</li> <li>3. Describe and identify prerequisite skills and analyze model lessons, sample test questions, and rubrics related to <i>selected standards</i> in language arts, math, science, and social science.</li> <li>4. Use Frameworks and Released questions to plan pacing of standards for the first quarter and second quarters. Use Frameworks, Blueprints, and Released Questions to plan pacing of standards for the third and fourth quarters</li> <li>5. Align ELA and ELD standards</li> </ol>
<p align="center"><b>Knowledge and Use of Assessments</b></p> <ol style="list-style-type: none"> <li>1. Use summative Assessments – CST data to inform instruction.</li> <li>2. Use <i>Trimester Benchmarks</i> to inform instruction: Core Reading &amp; Math Programs.</li> <li>3. Using <i>Progress monitoring</i> assessments Core Reading &amp; Math Programs.</li> <li>4. CELDT—Guidelines for administering</li> <li>5. Use various assessments to screen students for fundamental skills and concepts: Phonics Survey, TOWER, DIBELS, Graded Math Assessments of Number Sense and Operations.</li> <li>6. Assess learning styles and natural intelligences.</li> <li>7. Checklists for monitoring key skills in reading and math.</li> <li>8. Determine each child's independent and instructional reading levels and understand why this is important in developing fluency &amp; comp.</li> <li>9. Use Frameworks as a guide for assessment strategies.</li> <li>10. Use assessments to identify students needing more challenging work, intervention, or for referral for possible Special Education Services.</li> <li>11. Use assessments for instructional grouping, pacing, and differentiating instruction. <b>Implement RTI</b></li> <li>12. Use students' work, oral responses, questions, and other behaviors to assess progress.</li> <li>13. Create and maintain student portfolios.</li> <li>14. Trimester Benchmark Assessments</li> <li>15. Create reliable and valid performance assignments and rubrics by carefully describing desired behaviors.</li> </ol>	<p align="center"><b>Knowledge of Content and Instructional Methods in Reading</b></p> <ol style="list-style-type: none"> <li>1. Teachers use effective researched-based procedures for teaching <b>Word analysis and Vocabulary Development</b> and use those methods across the curriculum. Teachers in grades K-3 will analyze model lessons and use their <b>core program</b> to identify the essential elements of well designed lessons that teach the following:               <ol style="list-style-type: none"> <li>a. The alphabet</li> <li>b. Phonemic awareness that includes manner and place of articulation of consonants and vowels.</li> <li>c. Methods for blending sounds for students who have difficulty</li> <li>d. Spelling Patterns and how to teach them.</li> <li>e. Direct instruction of vocabulary</li> <li>f. Methods of developing word and text fluency.</li> </ol> </li> <li>2. Analyze core &amp; model lessons and identify the essential elements of well designed lessons. Practice selected procedures for teaching the following <b>Reading strategies</b> (Process) and <b>Reading comprehension</b> skills:               <ol style="list-style-type: none"> <li>a. Discussion and questions of stories based on narrative text elements (structure) and tied to literary analysis.</li> <li>b. Oral and written retellings of narratives.</li> <li>c. Use the structure of expository text—topic, main idea, details, rhetorical form to teach students to form WH Questions.</li> <li>d. Oral and written paraphrases of expository text.</li> </ol> </li> <li>3. Use read-alouds to motivate students' independent reading and develop vocabulary and concepts.</li> <li>4. Use the Reading/Language Arts Framework as a guide for effective instructional strategies.</li> <li>5. Review various instructional materials available for teaching reading and learn to use them in standards-based lessons.</li> <li>6. Plan projects and performance assignments based on unit concepts and literature to be used.</li> <li>7. Select appropriate reading materials for various groups of students and plan for differentiated instruction based on assessments and observations.</li> </ol>
<p align="center"><b>Knowledge of Instructional Methodology—Writing Strategies &amp; Applications</b></p> <ol style="list-style-type: none"> <li>1. Review and map the standards for writing, written and oral language and writing applications.</li> <li>2. Review, analyze and Create writing prompts designed to develop, practice, and assess oral and written strategies and genres.</li> <li>3. Use the standards and student models to plan lessons, and create rubrics for oral and written tasks. Grades 3-5 to use the rubrics developed by the state.</li> <li>4. Analyze model lessons to identify strategies (writing process) that develop students' oral and written discourse. These include:               <ol style="list-style-type: none"> <li>a. Deep discussion and the development of knowledge prior to retelling, oral paraphrase or writing.</li> <li>b. The use of Visual Notes—student and teacher drawn pictures and labels that record the ideas students have read or talked about.</li> <li>c. The use of selected graphic organizers to show the relationship between ideas and to plan writing.</li> <li>d. The use of Visual Notes to teach written narration, paraphrasing or summarizing.</li> <li>e. Sentence lifting and other techniques to improve oral and written expression.</li> </ol> </li> <li>5. Plan for the use of writing strategies and applications across the curriculum.</li> <li>6. Use various instructional materials available for teaching writing strategies and applications in standards-based lessons.</li> <li>7. Provide systematic instruction on writing applications assessed in Grade 4.</li> </ol>	<p align="center"><b>Knowledge of Content and Instructional Methodology Math</b></p> <p>Teachers will use research-based methods and strategies to develop math concepts and skills. These include:</p> <ol style="list-style-type: none"> <li>1. Use concrete (hands-on) and semi-concrete materials to teach concepts &amp; skills. <b>Initially, examples in the core program to be used. Later, examples will include those developed by the instructional specialist and teachers.</b></li> <li>2. Use effective methods and strategies to develop algebraic thinking across the grades.</li> <li>3. Use effective methods to insure mastery of math vocabulary—reading, spelling, conceptual understanding and use.</li> <li>4. Use verbal rehearsal to master the steps of solving algorithms and math procedures.</li> <li>5. Use games, activities and technology to insure the mastery of math facts, mental math and math concepts.</li> <li>6. Use effective strategies to teach the solving of word problems.</li> <li>7. Provide massed and spaced practice to consistently review skills.</li> <li>8. Use math journals effectively.</li> <li>9. Review various instructional materials available for teaching math and learn to use them in standards-based lessons. Plan math projects that connect to the real world and across the curriculum. Group students for differentiated instruction.</li> </ol>

## PSC-Watts Learning Center Foundation, Inc

<b>Professional Development Objectives/Goals</b>	
<p style="text-align: center;"><b><i>Knowledge of Special Education Programs and Procedures</i></b></p> <p>Teachers know and follow state and federal laws that stipulate requirements in the following areas:</p> <ol style="list-style-type: none"> <li>1. Search and serve</li> <li>2. The composition and role of the Student Success Team</li> <li>3. The Referral process</li> <li>4. Assessment Procedures</li> <li>5. IEP Process</li> <li>6. Due Process Procedures</li> <li>7. Implementing RTI to reduce</li> <li>8. Implementing accommodations and modifications</li> </ol>	<p style="text-align: center;"><b><i>Organization &amp; Methodology ELD</i></b></p> <ol style="list-style-type: none"> <li>1. Fully understand the articulation or alignment of ELD standards and levels with ELA standards.</li> <li>2. Identifying and assessing EL's -- CELDT</li> <li>3. Monitor the ELD program by reviewing placement data, student observation and work and progress of ELD students on a regular basis.</li> <li>4. Maintaining ELD portfolios</li> <li>5. Consistently provide ELD instruction on a daily basis using the adopted ELD program and other effective resources and strategies.</li> <li>6. Provide intervention in ELD for students who are failing to make adequate progress.</li> <li>7. Using effective language acquisition strategies (SDAIE &amp; Sheltered English) to provide access to the content areas.</li> <li>8. Using assessments to <b>reclassify students</b> –portfolios, CELDT, Benchmark Assessment</li> </ol>