



BOARD OF COMMISSIONERS MEETING

DATE: March 18, 2024

TIME: 5:30 PM

LOCATION: 1920 Mariposa Street, Suite 310 Fresno, CA 93721

ZOOM LINK: <https://fresnoeoc.zoom.us/join/917KsoMZXR0PyLSmZIQE>

AGENDA

ITEM	SUBJECT	PRESENTER	ACTION
1.	CALL TO ORDER AND COMMUNITY ACTION PROMISE: Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.		
2. Page 5	ROLL CALL A. Board and Committee Meetings Monthly Attendance Record		
3. Page 9	SEATING OF COMMISSIONERS	Baines, Chair	Approve
4. Page 13	ANNUAL ELECTION OF OFFICER A. Treasurer	Price, Legal Counsel	Approve
5. Page 14	JANUARY 22, 2024 BOARD MEETING MINUTES	Baines, Chair	Approve
6.	ADDITIONS TO THE AGENDA <i>(The Board may add an item to the agenda if, upon a two-thirds vote, the Board finds that there is a need for immediate action on the matter and the need came to the attention of the Board after the posting of this agenda.)</i>		
7.	POTENTIAL CONFLICT OF INTEREST <i>(Any Board Member who has a potential conflict of interest may now identify the item and recuse themselves from discussing and voting on the matter.) (FPPC §87105)</i>		
8. Pages 21-286	CONSENT AGENDA – ITEMS 8I - 8XXXI <i>See attached consent agenda.</i> Any Commissioner or member of the public may pull any Consent Item for discussion.	Baines, Chair	Approve
9. Page 287	TRANSFORMING AND INSPIRING A. Local Conservation Corps Portfolio – 2023 Strategic Program Progress Report Year 1 B. Advance Peace Video	Riggins, Staff Foster, Staff	Information
10. Page 288	AGENCY FINANCIAL AND HEAD START FINANCIAL STATUS REPORT JANUARY 2024	Warnes, Staff	Accept
11. Page 294	SCHOOL OF UNLIMITED LEARNING: MATERIAL REVISION PETITION	Lazzarini, Staff	Approve

12. Page 485	2024 COMMITTEE APPOINTMENT	Baines, Chair	Approve
13. Page 487	CHIEF EXECUTIVE OFFICER’S REPORT	Reyes, CEO	Information
14.	<u>PUBLIC COMMENTS</u> <i>(This is an opportunity for the members of the public to address the Board on any matter related to the Commission that is not listed on the Agenda. Limit three minutes per speaker)</i>		
15.	COMMISSIONERS’ COMMENT	Baines, Chair	
16.	ADJOURNMENT	Baines, Chair	
NOTE:	NEXT SPECIAL BOARD MEETING: Monday, March 25, 2024, at 5:30 p.m.		



BOARD OF COMMISSIONERS MEETING

CONSENT AGENDA

(Any Commissioner or member of the public may pull any Consent Item for discussion)

ITEM	SUBJECT	PRESENTER	ACTION
8I. Page 21	DECEMBER 4, 2023 HUMAN RESOURCES MEETING MINUTES	Dibie, Staff	Accept
8II. Page 25	DECEMBER 5, 2023 SCHOOL OF UNLIMITED LEARNING GOVERNING COUNCIL MINUTES	Lopez, Staff	Accept
8III. Page 27	DECEMBER 13, 2023 FINANCE COMMITTEE MEETING MINUTES	Zapata, Staff	Accept
8IV. Page 31	DECEMBER 18, 2023 PROGRAM PLANNING AND EVALUATION COMMITTEE MEETING MINUTES	Tutunjian, Staff	Accept
8V. Page 34	JANUARY 9, 2024 HEAD START COUNTY WIDE POLICY COUNCIL MINUTES	Pineda, Staff	Accept
8VI. Page 38	FEBRUARY 05, 2024 EXECUTIVE COMMITTEE MEETING	Baines, Chair	Approve
8VII. Page 42	FEBRUARY 6, 2024 HEAD START COUNTY WIDE POLICY COUNCIL MINUTES	Pineda, Staff	Accept
8VIII. Page 45	FINANCIAL REPORT: AGENCY FINANCIAL AND HEAD START FINANCIAL STATUS REPORT NOVEMBER/DECEMBER 2023 A. Supporting Document	Zapata, Staff	Accept
8IX. Page 55	AGENCY'S INVESTMENT REPORT	Zapata, Staff	Information
8X. Page 56	HEALTH INSURANCE REPORT A. Supporting Document	Zapata, Staff	Information
8XI. Page 58	EMPLOYEE POLITICAL & ADVOCACY ACTIVITIES POLICY A. Supporting Document	Dibie, Staff	Approve
8XII. Page 61	HUMAN RESOURCES QUARTERLY SUMMARY REPORT A. Supporting Document	Dibie, Staff	Information
8XIII. Page 237	SANCTUARY AND SUPPORT SERVICES: PROJECT HOPE BRIDGE HOUSING UPDATE A. Supporting Document	Gattie-Blanco, Staff	Information
8XIV. Page 239	WOMEN, INFANTS & CHILDREN: PROGRAM MONITORING REVIEW A. Supporting Document	Thornton, Staff	Information

8XV. Page 243	PROGRAM PLANNING & DEVELOPMENT: FEBRUARY 2024 GRANT TRACKER A. Supporting Document	Medina, Staff	Information
8XVI.	VALLEY APPRENTICESHIP CONNECTIONS	Turner, Staff	Information
8XVII. Page 247	EXECUTIVE COMMITTEE CHARTER A. Supporting Document	Perez, Staff	Approve
8XVIII. Page 251	FOOD SERVICES: FACILITY STRATEGIC PLAN - AD HOC COMMITTEE	Tutunjian, Staff	Approve
8XIX. Page 253	FOSTER GRANDPARENTS PROGRAM: 2024 AMERICORPS SENIORS FOSTER GRANDPARENT PROGRAM REPLACEMENT AND EXPANSION OPPORTUNITY GRANT	Lazzarini, Staff	Ratify
8XX. Page 255	HEALTH SERVICES: 2024 PUBLIC AWARENESS AND COMMUNITY OUTREACH CAMPAIGN SERVICES GRANT	Lazzarini, Staff	Ratify
8XXI. Page 257	TRAINING AND EMPLOYMENT: CALIFORNIA ECONOMIC RESILIENCY FUND (CERF) SUBAWARD AGREEMENT	Lazzarini, Staff	Ratify
8XXII. Page 259	COMMUNITY NEEDS ASSESSMENT	Tutunjian, Staff	Information
8XXIII. Page 261	PROGRAM PLANNING AND DEVELOPMENT: MARCH 2024 GRANT TRACKER A. Supporting Document	Medina, Staff	Information
8XXIV. Page 264	PUR REPORTS – DECEMBER 2023 AND JANUARY 2024 A. Supporting Document	Pineda, Staff	Accept
8XXV. Page 270	HEAD START 0-5 MONTHLY UPDATE	Pineda, Staff	Information
8XXVI. Page 272	HEAD START 0 TO 5 SELECTION CRITERIA A. Supporting Document	Pineda, Staff	Approve
8XXVI. Page 274	RECRUITMENT AND ENROLLMENT POLICY A. Supporting Document	Pineda, Staff	Approve
8XXVIII. Page 281	LOCAL CONSERVATION CORPS: LOCAL CONSERVATION CORPS SENATE BILL (SB) 1013 GRANT PROGRAM (LCC-1)	Neil, Staff	Ratify
8XXIX. Page 283	FOSTER GRANDPARENT PROGRAM: 2024 AMERICORPS SENIORS FOSTER GRANDPARENT PROGRAM RENEWAL GRANT	Neil, Staff	Ratify
8XXX. Page 285	ENERGY SERVICES: 2021 LOW-INCOME HOME WATER ASSISTANCE PROGRAM (LIHWAP)	Neil, Staff	Information
8XXXI. Page 286	SANCTUARY AND SUPPORT SERVICES: NATIONAL SAFE PLACE WEEK	Tutunjian, Staff	Information

BOARD OF COMMISSIONERS ROLL CALL 2024

#	Commissioner	Term Expiration	Target Area / Appointing / Nominating Org.	1/22	2/24 Board Training	3/18	4/15	5/20	6/4-8 CAPLAW Training	9/16	10/21	11/18	12/16
1	ARAMBULA, AMY	Dec 2024	31st Assembly District	0	0								
2	BAINES, OLIVER	Dec 2024	16 th Congressional District	0	0								
3	BONNER, ALYSIA	Dec.2024	Target Area F	0	0								
4	BROWN, EARL	Dec 2024	Target Area G	0	0								
5	BROWN-JENKINS, ZINA	Dec 2024	Head Start CWPC	0	0								
6	GARABEDIAN, CHARLES	Dec 2025	Board of Supervisors	X	0								
7	HAYES, LINDA R.	Dec 2024	Target Area H	0	0								
8	JAIME-MILEHAM, LUPE	Dec 2024	FCSS	X	0								
9	KING BRIAN	Dec 2025	Mayor's Appointment	0	X								
10	LEON, REY	Dec 2024	Target Area B	X	0								
11	MARTINEZ, DANIEL	Dec 2025	Target Area D	0	X								
12	MARTINEZ, JAMES	Dec 2025	Fresno Reel Pride	0	X								
13	MARTINEZ, LUIS	Dec 2025	14 th Senatorial District	0	0								
14	MCALISTER, BRUCE	Dec 2025	West Fresno Faith Based Organization	0	0								
15	MCCOY, BARIGYE	Dec 2024	Board of Supervisors	X	X								
16	MITCHELL, LISA	Dec 2025	Target Area E	0	0								
17	NIKKEL, LAUREN	Dec 2024	Economic Development Corp.	N/A	N/A								
18	PACHECO, ALENA	Dec 2025	Target Area A	0	X								
19	PARRA, DANIEL	Dec 2024	Target Area C	X	0								
20	PIMENTEL, ROBERT	Dec 2025	SCCCD	0	0								
21	RODGERS, JIMI	Dec 2025	Association of Black Social Workers	0	0								
22	ROMERO, MANUEL	Dec 2025	Central La Familia Advocacy Services	0	0								
23	RUIZ, DAVID	Dec 2024	Juvenile Court	0	0								
24	TAYLOR, STEVEN	Dec 2024	NAACP	0	0								
	Present = 0		= 1 absent										
	Absent = X		= 2 absent										
	Teleconference = T		= 3 absent										

It is the Commissioner's responsibility to check the matrix, verify accuracy and inform the Secretary or designee if any changes are needed.



Audit Committee Meeting
Monthly Attendance Record
2024
Dates TBD

Oliver Baines
Robert Pimentel
Amy Arambula
Lisa Mitchell
Charles Garabedian
Earl Brown
Alysia Bonner
Linda Hayes
Jimi Rodgers

Jan.	Feb	Mar	April	May	June	July	Aug.	Sep	Oct	Nov	Dec	Attended

O-Present X-Absent T-Teleconference



Bylaws Committee Meeting
Monthly Attendance Record
2024

Lisa Mitchell
Linda Hayes
David Ruiz
Luis Martinez
Zina Brown-Jenkins

Jan.	Feb	Mar. 21	April	May	June	July	Aug.	Sep. 19	Oct	Nov. 21	Dec	Attended
												0/3
												0/3
												0/3
												0/3
												0/3
												0/3

O-Present X-Absent T-Teleconference



Executive Committee Meeting Monthly Attendance Record 2024

Oliver Baines
 Robert Pimentel
 Amy Arambula
 Lisa Mitchell
 Charles Garabedian
 Earl Brown
 Alysia Bonner
 Linda Hayes
 Jimi Rodgers

January	5-Feb	4-Mar	8-Apr	6-May	June	1-Jul	5-Aug	9-Sep	7-Oct	4-Nov	2-Dec	Attended
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10
	O	O										2/10

O-Present X-Absent T-Teleconference



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: N/A
Agenda Item #: 3	Director: N/A
Subject: Seating of Commissioners	Officer: Emilia Reyes

Recommended Action

Staff recommends ratification of the Public Official Appointment and Community Sector nomination to serve on the Fresno EOC Board of Commission.

Background

Public Official Appointment	Appointing Body	Term
Charles Garabedian	Board of Supervisors	February 6, 2024 – December 31, 2025
Community Sector	Appointing Body	Term
Lauren Nikkel	Fresno County Economic Development Corporation	March 5, 2024 – December 31, 2024

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board, Commissioner term will be seated to serve on the Fresno EOC Board of Commissioners. If not approved these seats will remain vacant.



County of Fresno

BOARD OF SUPERVISORS

Chairman
Nathan Magsig
District Five

Vice Chairman
Buddy Mendes
District Four

Brian Pacheco
District One

Steve Brandau
District Two

Sal Quintero
District Three

Bernice E. Seidel
Clerk

February 7, 2024

Charles E. Garabedian, Jr.
2581 E Central SP 49
Fresno, CA 93725

Subject: Appointment to Fresno Economic Opportunities Commission

Dear Mr. Garabedian,

We are pleased to inform you that on February 6, 2024, under Supervisor Quintero's nomination, you were reappointed by the Board of Supervisors to serve on the **Fresno Economic Opportunities Commission** (hereinafter referred to as "commission") for a term expiring on **December 31, 2025**. We thank you for your interest in serving our County.

Brown Act Requirements

Newly elected and appointed members of a "legislative body" who have not yet assumed office must conform to the requirements of the Brown Act as if already in office (Govt. Code section 54952.1). Until you hear otherwise, you should immediately begin to refrain from any discussions of commission business, with a quorum of the commission, outside a formal commission meeting. If you have any questions about the Brown Act or your responsibilities and duties under it, please consult your commission's legal counsel.

State Mandated Ethics Training

California Government Code Section 53235 provides that if a local agency (which includes special districts) provides any type of compensation, salary, or stipend to a member of a legislative body, or provides for reimbursement for actual and necessary expenses incurred by a member of a legislative body in the performance of official duties, then all local agency officials shall receive training in ethics. Such local agency officials must receive **two hours** of ethics training within one year of commencing service with the local agency and once every two years thereafter. Please consult your commission's staff or legal counsel with questions relating to this requirement.

Should you be required to comply with the ethics training requirement, the Fair Political Practices Commission (FPPC) offers **free online training** at <http://localethics.fppc.ca.gov/login.aspx>. This course requires that you log onto the FPPC's website, review the course content materials, and take periodic tests to assure retention of the information. For those who choose this option, please be aware that the certificate will record how much time an individual spends to complete the online training. You must complete **at least 2 hours** of training time in order to be compliant with the training requirement. If an individual completes the online training in less than two hours, the certificate will reflect this, indicating that the individual has not completed the required amount of training.

When you complete the training, you will receive a Proof of Participation certificate to sign and submit to whoever maintains the training compliance records for your commission (e.g., the clerk or secretary for the commission). You should keep a copy of the certificate for your records. The commission is required to retain the certificates as public records for at least five years.

On behalf of the Fresno County Board of Supervisors, we wish to extend sincere appreciation for the time and effort you are giving in service to your community and Fresno County.

Sincerely,



Bernice E. Seidel
Clerk of the Board

cc: **Fresno Economic Opportunities Commission**



March 5, 2024

Emilia Reyes
1920 Mariposa Street, Suite 300
Fresno, CA 93721

RE: EDC Board Member

Dear Emilia,

Fresno EDC would like our Director of Business Services, Lauren Nikkel to be our representative as Commissioner for Fresno EOC. She will plan to serve the term through December 31, 2024, as requested.

Lauren Nikkel
lnikkel@fresnoedc.com
559-721-2241

Please let us know if you need anything else.

Thank you,

A handwritten signature in black ink, appearing to read "Will Oliver", is positioned above the printed name and title.

Will Oliver
President/CEO



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: N/A
Agenda Item #: 4	Director: N/A
Subject: Annual Election of Officer – Treasure	Officer: Ken Price

Recommended Action

The recommendation is to nominate and approve Commission Officer position for Treasurer.

Background

At the January 18, 2024, Board of Commissioners meeting, the Treasurer Officer position was tabled for the next Board Meeting scheduled.

The Treasure shall be elected to serve until the next annual meeting of the Commission or until their successors shall have been elected and qualify. No Commissioner shall hold more than one office at the same time.

The agency's current Bylaws state the duties and powers of the Treasure are as follows:

Treasurer shall: (1) oversee the Corporation's financial management practices, subject to the direction and control of the Board; (2) ensure that the Commissioners understand the financial situation of the Corporation (including ensuring that financial statements for each month are available for each meeting of the Board of Commissioners and are kept on file at the Corporation's principal office); (3) serve as Chair of the Finance Committee; (4) serve as an Authorized Check Signatory when the Chair is unavailable; and (5) perform such other duties and have such other powers as the Board of Commissioners may determine from time to time.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

Once elected and approved by the Board, the Treasure will serve for a for the remainder of the calendar year. If not approved, the Treasure Officer position will remain vacant.



BOARD OF COMMISSIONERS MEETING
January 22, 2024 at 5:30 PM
1920 Mariposa Street, Suite 310
Fresno, CA 93721

MINUTES

1. **CALL TO ORDER AND COMMUNITY ACTION PROMISE:**

Linda Hayes, Board Chair, called the meeting to order at 5:40p.m.

2. **ROLL CALL**

Present: Amy Arambula, Oliver Baines, Alysia Bonner, Earl Brown, Zina Brown-Jenkins, Linda Hayes, Brian King, Daniel Martinez, James Martinez, Luis Martinez, Bruce McAlister, Lisa Mitchell, Alena Pacheco, Robert Pimentel, Jimi Rodger, Manuel Romero, David Ruiz, and Steven Taylor.

Absent: Charles Garabedian, Rey Leon, Barigye McCoy, Daniel Parra and Lupe Jaime-Mileham

3. **APPROVAL OF DECEMBER 7, 2023 MINUTES**

A. December 7, 2023 Board Meeting Minutes

Public Comment: None heard.

Motion by: Brown **Second by:** Brown-Jenkins

Ayes: All in favor.

Nayes: None heard.

4. **ADDITIONS TO THE AGENDA**

Public Comment: None heard.

No action required.

5. **POTENTIAL CONFLICT OF INTEREST**

Public Comment: None heard.

No action required.

6. **SEATING OF COMMISSIONERS**

Linda Hayes, Board Chair announced the recommended Target Area representatives, Community Sector nominees, and Public Official appointed for a two-year term to the board effective January 1, 2024, pending appointment from Board of Supervisor and Fresno County Economic Development.

Public Comment: None heard.

Motion by: Bonner **Second by:** Taylor

Ayes: All in favor.

Nayes: None heard.

7. INTRODUCTION OF NEW COMMISSIONERS

Board Chair Hayes introduced the following new commissioners to the Fresno EOC Board: Manuel Romero, serving Centro La Familia Advocacy Services, and Luis Martinez, appointed by the 14th Senatorial District and they provided a brief introduction about their background.

Public Comment: None heard.

No action required.

8. ANNUAL ELECTION OF OFFICERS

Board Chair Hayes announced she will not be running to be re-elected for the Board Chair position. Emilia Reys, Chief Executive Officer/Secretary stated Commissioner Charles Garabedian shared interest in the Treasure Office Position. Kenneth Price, Legal Counsel stated due to his pending appointment application from the Board of Supervisor Commissioner Garabedian is not eligible.

Price asked for nomination from the floor for Treasure, there were none. Price stated as per the Bylaws Policies and Procedures *Article IX. Officers, Section 3. Election* "In the event that any or all of the Officers are not elected at the annual meeting, they may be elected at a subsequent Board Meeting."

The Commission nominated and approved the following Commission Officer Positions: Board Chair, Oliver Baines & Vice Chair, Robert Pimentel.

Public Comment: None heard.

Board Chair: Oliver Baines

Motion by: Bonner **Second by:** Mitchell

Vice Chair: Robert Pimentel

Motion by: Bonner **Second by:** McAlister

Reyes, Board Chair Baines, and Commissioner Arambula thanked previously Board Chair Hayes for her services, dedication, and great leadership.

9. 2024 SIGNATORY AUTHORIZATION RESOLUTION

Reyes provided a brief overview of the annual 2024 Signatory Resolution.

Public Comment: None heard.

Motion by: Arambula **Second by:** Rodgers

Ayes: All in favor.

Nayes: None heard.

10. TRANSFORMING AND INSPIRING

Susan Lopez, Principal/Chief Academic Officer, introduced Maria Morales, a parent of SOUL student, where she shared her experience and is very grateful for everything the SOUL program has done for her four children.

Lopez provided an overview of the SOUL Strategic Program Progress Report for the School year 2022-2023.

Public Comment: None heard.

No action required.

11. FINANCIAL REPORTS

A. Agency Financial and Head Start Financial Status Report October 2023

Jay Zapata, Chief Financial Officer, presented a detailed report of the Agency Financial statements and the Head Start Financial Status Report as of Year-to-Date for October 31, 2023.

Public Comment: None heard.

Motion by: Hayes **Second by:** Taylor

Ayes: All in favor.

Nayes: None heard.

12. 2024 AGENCY BUDGET

Zapata, provided a detailed presentation of the 2024 Agency's budget and supporting budgets by programs, allocation by function.

The Commission recommended this item to be tabled and presented at the March Board Meeting, with an itemized budget report with the various departments for approval.

Public Comment: None heard.

13. EMPLOYEE POLITICAL & ADVOCACY ACTIVITIES POLICY

Nelson Dible, People and Culture Officer, and Ken Price provided a detailed overview of the Employee Political & Advocacy Activities Policy to be included in the Fresno EOC Employee Manual as stated by law.

Public Comment:

Nasreen Johnson, a member of the public, stated concerns regarding the Advocacy Policies Activities for the Board consideration.

Stacy Williams, Equity and Inclusion Manager for Fresno EOC, inquired clarification regarding staff advocating for themselves and their families without violating the agency policies as well as providing tools and resources to staff.

Upon further discussion, the Commission recommended this item to be tabled and to be presented at the next meeting. The Policy is to be revised with the recommended feedback received from the Commission.

14. GUARANTEED INCOME PROGRAM

A. Advancing Fresno County Guaranteed Income Program

Reyes and Michelle Tutunjian, Chief Operating Officer/Deputy CEO, provided a presentation of the new Advancing Fresno Guaranteed Income Program, in the amount of \$1,025,000. Funding will assist 150 low-income families for a 12-month period.

Public Comment: None heard.

Motion by: Pimentel **Second by:** James Martinez

Ayes: All in favor.

Nayes: None heard.

15. LOCAL CONSERVATION CORPS

A. Congress Appropriations of Community Project Grant

Jack Lazzarini, Chief Programs Officer, provided an overview of the Congress Appropriations of Community Project Grant application, in the amount of \$500,000.

Public Comment: None heard.

Motion by: Bonner **Second by:** Rodgers

Ayes: All in favor.

Nayes: None heard.

16. HEALTH SERVICES

A. Title X Equity-Based Funding

Jane Thomas, Health and Dental Director, provided an overview of the Title X Equity-Based Grant application with Essential Access Health, in the amount of \$464,561.

Public Comment: None heard.

Motion by: Arambula **Second by:** Hayes

Ayes: All in favor.

Nayes: None heard.

17. SANCTUARY & SUPPORT SERVICES

A. Human Trafficking Victim Assistance (HV) Program

Commissioner Romero recused himself from this item due to a potential conflict of interest.

Misty Gattie-Blanco, Sanctuary Director, provide an overview of the Human Trafficking Victim Assistance application with The California Governor's Office of Emergency Services, in the amount of \$899,999.

Public Comment: None heard.

Motion by: Pimentel **Second by:** Bonner

Ayes: All in favor.

Nayes: None heard.

B. Homeless Services Proposal

Gattie-Blanco provide an overview of the Homeless Services Proposal submitted on January 9, 2024, in the amount of \$4,368,334 to the County of Fresno Department of Social Services.

Public Comment: None heard.

Motion by: Rodgers **Second by:** Hayes

Ayes: All in favor.

Nayes: None heard.

18. TRAINING AND EMPLOYMENT

A. Career Skills Training Grant

Patrick Turner, Training & Employment Services Director, provide an overview of the Career skills Training Grant Application with the U.S. Department of Energy, in the amount of \$1,081,250 for a four-year period.

Public Comment: None heard.

Motion by: Bonner **Second by:** Pimentel

Ayes: All in favor.

Nayes: None heard.

B. Strong Workforce Program Agreement

Turner provided an overview of the 12-week program with the State Center Community College District in the amount of \$180,000 for a one-year period.

Public Comment: None heard.

Motion by: Hayes **Second by:** Bonner

Ayes: All in favor.

Nayes: None heard.

19. HEAD START 0 to 5 MONTHLY UPDATE

Rosa M. Pineda, Head Start Director, provided an overview of the Head Start 0 to 5 monthly updated to keep the Commission appraised.

Pineda announced Andrea Harvey is no longer with the Office of Head Start and Dow-Jane Pei is the new Program Specialist.

Arambula requested to include the detailed action plan reviewed by the Adhoc.

Public Comment: None heard.

No action required.

20. APPROVAL OF CONSENT AGENDA

Any Commissioner may pull any Consent Item for discussion or separate vote.

Commissioner Arambula requested to include a detailed budget for 20D2: Head Start 0-5 Budget Modification FY 2023

Public Comment: None heard.

Motion by: Hayes **Second by:** Bonner
Ayes: All in favor. **Nayes:** None heard.

APPROVAL OF PULLED CONSENT AGENDA ITEMS

20A3. Transit System Electrification RFP: Nuvve Holding Corps Proposal

Chair Baines recommends this item to move forward with the stipulation to ensure the contractor hires local workforce and firms as presented in their proposal.

Public Comment: None heard.

Motion by: Brown **Second by:** Baines
Ayes: All in favor. **Nayes:** None heard.

21. CHIEF EXECUTIVE OFFICER'S REPORT

A. CEO Report

Reyes, shared the following:

- The City of Police, Mayor and City Managers held a Press conference at the end of last year to announce the crime rate has drop nearly 50% in Fresno and thanked the Advance Peace for their support and dedication to help reduce gun violence.
- Advance Peace Banquet is taking place on January 31, 2024, at The Grant 1401 and invited Commissioner and Staff to attend.

Public Comment: None heard.

No action required.

22. PUBLIC COMMENTS

Item #13: Employee Political & Advocacy Activities Policy

Jennifer Cruz, LGBTQ+ Manager, stated her concerns regarding the process for Advocacy Activities Policy for staff.

Public Comment: None heard.

No action required.

23. COMMISSIONERS' COMMENT

Commissioner Jimmi Rodgers mentioned the upcoming One Woman Arthop Show event on Thursday, February 1, 2024, at 5:00 PM at the First Presbyterian Church.

Commissioner Lisa Mitchell shared the following:

- The office of African American Academic Acceleration (A4) and Fresno Unified School District Parent University to the upcoming "Black Voices in Literacy" family event. The event is scheduled to take place on January 27, 2024, from 10:00 am to 1:00 pm at the Fresno Convention and Entertainment Center.
- The 10th Annual Black History Month Program event takes place on Thursday, February 1, 2024, at 6PM at Roosevelt High School, Audra McDonald Theater.

24. NEXT MEETING:

Saturday, February 24, 2024, Board Training.

25. ADJOURNMENT

HUMAN RESOURCES COMMITTEE**December 4, 2023****5:00 PM****MINUTES****1. CALL TO ORDER**

Committee Member, Jimi Rodgers, called the meeting to order at 5:10 PM.

2. ROLL CALL

Roll was called and a quorum was established.

Commissioners Present: Jimi Rodgers, Alysia Bonner, Earl Brown

Teleconference:

Commissioners Absent: Sherry Neil and Barigye McCoy

Staff Present: Emilia Reyes, Karina Perez, Michelle Tutunjian, Jay Zapata, Nelson Dibie, Steve Warnes, Jack Lazzarini, Erica Reyes, Crystal Perez, Kevin Williams, Stacy Williams, Andy Arredondo, Elionora Vivanco

Pension Representatives: Lloyd Engleman, Fred Hamaseyah, and Ryan Louie

3. APPROVAL OF September 11, 2023, MINUTES

A. September 11, 2023, Human Resources Meeting Minutes

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

4. HUMAN RESOURCES QUARTERLY SUMMARY REPORT

A. Human Resources Quarterly Summary Report

Nelson Dibie, Human Resources Officer, explained that compared to the past quarter we have accumulated more new hires than employees that we lost. In workers' comp comparison to the previous quarter there have been fewer incidents compared to the last report that was sent to commissioners' way. As for the benefits area, Dibie explained this year's open enrollment was higher than it was last year. As a department, we are meeting the expectations of the agency. Commissioner Rodgers expressed gratitude for the layout of the graphs to be clear. It has been something they have been asking for. Dibie stated the only information is not on the report is of the exit interview but that will be presented at the board retreat in January.

Public comment: None heard.

No action is required.

5. PERSONNEL POLICIES AND PROCEDURES MANUAL REVISIONS

A. Personnel Policies and Procedures Manual Revisions

Dibie explained that request for approval is to reduce the number of accrued sick days per year from 9 days to 7 days due to PSL (state-mandated) increasing from 3 to 5 days per year. It was added together and it still adds up how many times the employees take off a year. Rodgers confirmed the new rates of PSL from 3 days to 5, and the request to change the sick days from 9 to 7.

Dibie mentioned the second request for paid time off for the period December 25-January 1. It could become more appealing to gain qualified candidates to apply for a job within the agency. Commissioner Brown questioned whether the \$800,000 is going to be covered in the budget. Zapata stated it would be projected from the 2024 budget and to clarify it is not a cash expense. The vacation balance is carried on a balance sheet. He also mentioned how employees already use that time off in the holiday season but having the paid time off would create a vacation time accrual to push it back a couple more months so they can use it at vacation time later in the year rather than using it in the holiday time. It's a current projected increase in cost in the 2024 budget.

Emilia Reyes, Chief Executive Officer, reinstated that the funds would be coming from the program budgets. The funder would need to see it as an approved policy. Commissioner Bonner asked to have it clarified if we have an accrual process so that they do not lose their vacation per year, Zapata confirmed.

Commissioner Rodgers asked for clarification that some staff who had to work more hours just to cover those end-of-the-year dates by approving this will satisfy the employees not need to worry about not having time to cover. Commissioner Bonner stated it was a great idea.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.

Nayes: None heard.

6. COST OF LIVING ADJUSTMENT

Dibie presented the Cost of Living Adjustment for approval.

Dibie explained the recommendation for a COLA of 4.7% and increasing the amount will help employees who are struggling and help us recruit more qualified applicants. Commissioner Rodgers asked where the funding would come from.

Zapata stated the current funders are going through a review process to revise their budgets. Because we had some contracts that were ever-green and did not have updated costs we had a lot of contract restructuring to include the personnel expenses. Commissioner Hayes questioned if the funder did not go along with it, would they go to the board to use CSBG funds? Zapata that's a possibility if they say no but have been getting good feedback. Hayes asked when will programs take responsibility if they want these things, and not rely on CSBG funding. Emilia Reyes explained the COLA will be coming out of the program's budget since it was built into their budget so we can get reimbursed. Commissioner Rodgers asks if the funder refuses will it affect our personnel. Zapata stated it would help us to be a competitor when recruiting. Commissioner Brown asked when will this take place, confirmed January 1, 2024.

Public Comment: None heard.

Motion by: Brown **Second By:** Bonner

Ayes: All in favor.
Nayes: None heard.

7. **EMPLOYER 401(A) PENSION PLAN**

Dibie presented the Employer 401(a) pension plan changes for approval. Explained that employees wait 2 years to be allowed have 401(a). Of the employees that declined a position with EOC in the last few months, the pension wait time was a main reason. They are not wanting to wait two years. Dibie propose a decrease from 2 years to 6 months. Commissioner Brown asked what is the difference and if there is a big difference between 6 months and the time of hire? Dibie stated only after their probation they would be able to be qualified. Commissioner Brown asked why not tie the benefit to the probation? Commissioner Bonner recommended not to change the probation period, 6 months is fine. Dibie stated that his goal for tonight is not to tie the probation to the investing. They are separate. The only goal is to lower the 2 years to 6 months. Commissioner Rodgers suggested taking a look at whether the probation period will be 6 months or one year and then from there to decide on employer contribution, they could almost go together. Commissioner Brown asked to use this as a recurring tool. Commissioner Rodgers how many employees as soon as they are eligible do they do it? Erica Reyes, they don't apply they are automatically enrolled.

Public Comment: None heard.

Motion by: Bonner **Second By:** Rodgers
Ayes: All in favor.
Nayes: None heard.

8. **COMPENSATION STUDY**

Dibie presented the compensation study provided in the packet. Expressed EOC may face losing managers or other employees. Also mentioned other locations are offering to pay others higher than our agency does. Commissioner Hayes questioned the number that was provided on page 9. that the number may have been skewed. Stating it may not be realistic for a non-profit organization. Unsure where the information came from. Commissioner Brown expressed concern that we should determine what our competitive market is rather than going across the country that may match the job description in California. Commissioner Brown also stated we should determine employers or agencies that are most like us and determine what is a fair wage. Compared to those who we are competing with. Commissioner Brown did not like the comp study report that was provided in the packet because it had states other than California. Commissioner Hayes questions if the consultant did not use the other states in the study why was it placed in the study packet? Emilia Reyes identified the recommendation on page 7 about the data that was used and the justification. Commissioner Hayes stated the range is so far within the min, mid, and max columns. The information does not seem to be clear. Hayes asked if Job classification should drive what the salary should be. Dibie stated he would provide a better layout to show the proper wage and comparison with qualifications. Hayes made a motion for approval of this salary survey to be established of the base to HR department and starting point when they do their position description they will have a minimum mid and max and base for the salaries.

Public Comment: None heard.

Motion by: Hayes **Second By:** Bonner
Ayes: All in favor.
Nayes: None heard.

9. OTHER BUSINESS

Fiduciary Investment Review

Page 23 maintains records for the company. Responsibility is to make sure that the agency is in the best shape to avoid those situations in the rare event of getting a tail audit you will have everything on file maybe attain those files for you. Engleman stated staff will always have access.

Page 27 Investing is important - staff can choose their own investment based on the risk tolerance. Interface with employees look at particular situations and make sure they are in the right investments. Page 33 - yellow flag is an item on the watch list, red minus with circle that was replaced mid-fourth quarter however it has been replaced. Show all costs as a percentage of assets. The record keeps TransAmerica was charging .27% but was able to negotiate down to .24%. The flat fee gets paid the same. Do not get paid more if assets go up.

Public Comment: None heard.

Motion by: Bonnor **Second By:** Rodger

Ayes: All in favor.

Nayes: None heard.

10. PUBLIC COMMENTS

Public comment: None heard.

No action is required.

11. ADJOURNMENT

The Meeting was adjourned at 6:47 p.m.

**FRESNO EOC SCHOOL OF UNLIMITED LEARNING
GOVERNING COUNCIL MEETING
Sanctuary Recreation Room
Tuesday, December 5, 2023
MINUTES**

1. Meeting called to order by Dr. Terry Allen 8:35 a.m.
2. Community Action Promise
Terry Allen guided the Governing Council in reading the Community Action Promise.
3. Roll call facilitated by Commissioner Rodgers.

Voting Members	Present	Excused	Absent	Staff	Present	Excused	Absent	Non-Voting Member	Present	Excused	Absent	Guests
Terry Allen, Ed.D., Chair, Retired Teacher Representative	X			Jack Lazzarini	X			Felicia Olais	X			
Benita Washington, Vice Chair, FSU Social Worker Representative	X			Cha Vang		X						
Jimi Rodgers, Secretary, Fresno EOC Commissioner	X			Michelle Tutunjan	X							
Larry Metzler, Cultural Arts Rotary Interact Club Advisor	X			Emilia Reyes		X						
Jeanne Starks, Retired Law Enforcement Juvenile Probation	X											
Julio Romero, EOC Health Services			X									
Steven Taylor, Fresno EOC Commissioner		X										
Patrick Turner, Fresno EOC Training and Employment	X											
Parent Rep Lucy Luttrell	X											
Student Rep's (2) Halle Overton, Kassandra Saavedra	X											
Alternate Student Rep	X											
Susan Lopez, Staff Representative, Principal	X											
Rena Failla, Staff Representative, Guidance Coordinator		X										
Courtney Griffin, Staff Representative, Guidance Dean	X											
Sandy Lomelino, Staff Representative, Coordinator of Curriculum & Instruction	X											

4. **Approval of Minutes**
October 17, 2023 Governing Council Meeting Minutes.

Public Comments: None heard.

Motion by: Metzler **Second by:** Starks

Ayes: Allen, Washington, Rodgers, Griffin, Overton, Lomelino, Lopez, Luttrell, Saavedra, Turner

Nays: None

5. **Public Comments**

(This portion of the meeting is reserved for persons wishing to address the Council on items within jurisdiction but not on the agenda. Comments are limited to three minutes).

6. **Proposed New Members**

Susan Lopez introduced our proposed Governing Council Representatives to Council Members: 1) Student Representatives, Halle Overton and Kassandra Saavedra, 2) Parent Representative, Lucy Luttrell and 3) Fresno EOC Training and Employment representative, Patrick Turner. A motion was made to approve the proposed representatives.

Public Comments: None heard.

Motion by: Starks **Second by:** Lopez

Ayes: Allen, Washington, Rodgers, Griffin, Overton, Lomelino, Luttrell, Saavedra, Metzler, Turner

Nays: None

7. SOUL Dashboard

Lopez reported on Fresno EOC's Interactive Dashboard developed for SOUL from CAP60 data. The Dashboard report is a detailed visualization of SOUL's live data and the multi-services provided to our students by Fresno EOC. The Dashboard will be available to the public in the near future. Council members discussed the information presented.

8. SOUL Update: Principal Report

Lopez reported on the Classroom Based and Independent Study demographics as presented on the Principals report.

- Current enrollment is 211.
- The Special Ed and English Language (EL) population has grown in the Independent Study program.
- Teachers are working to provide a speaking and writing component for our EL student's and improve their literacy skills.
- Senior Luncheon will be held at Nielsen Center on Monday December 11, 2023 at 11:30 am.
- SOUL's Winter Graduation Ceremony will be held Thursday, December 14, 2023.
- Ed Tech continues to work on SOUL's Material Revision to be presented to FUSD Board in the spring of 2024.

9. Other Business

Lopez reported that SOUL will present the Material Revision, to the Governing Council Members at a Special Meeting, tentatively scheduled for Wednesday, January 17, 2024. Upon approval by the Council, it will be presented to Fresno EOC's Board of Commissioners at their next scheduled meeting.

Terry Allen announced that the next Governing Council meeting will be held, Tuesday, February 6, 2024.

10. Adjournment of Meeting

Meeting adjourned at 9:21 am

Submitted by Commissioner Jimi Rodgers, SOUL Governing Council Secretary

**FINANCE COMMITTEE MEETING
Wednesday, December 13, 2023
5:00PM
MINUTES**

1. CALL TO ORDER

Charles Garabedian, called the meeting to order at 5:03 pm.

2. ROLL CALL

Roll was called and a quorum was established.

COMMITTEE MEMBERS	PRESENT	STAFF	STAFF
Charles Garabedian (Committee Chair)	√	Steve Warnes	Jay Zapata
Rey Leon		Karina Perez	Jack Lazzarini
James Martinez	√	Jennifer Tillman	Jerry Moreno
Linda Hayes		Chris Erwin	Jane Thomas
Zina Brown-Jenkins	√	Angela Riofrio	Elionora Vivanco
Itzi Robles	√	Maria Elizondo	
Alena Pacheco	√	Thomas Dulin	

3. APPROVAL OF NOVEMBER 8, 2023 MINUTES

A. November 8, 2023 Finance Committee Minutes

Public comment: None heard.

Motion by: Zina Brown-Jenkins **Second by:** Itzi Robles

Ayes: Garabedian, Zina Brown-Jenkins, Itzi Robles

Nays: None heard

4. FINANCIAL REPORTS

A. Agency Financial Statements

B. Head Start Financial Status Report

Motion by: James Martinez **Second by:** Zina Brown-Jenkins

Ayes: Garabedian, James Martinez, Zina Brown-Jenkins

Nays: None heard

Jay Zapata, Chief Financial Officer, presented the Financial Statements for Year-to Date for October 2023 as well as the approval of the financial status report for the Head Start 0-5 program as of Year-to-Date October 2023. Through October 2023 the Total Revenues and Support are \$137,951,919 and Total Expenditures are 123,618,858.

Jennifer Tillman, Finance Manager for Head start presented the Head Start Financial Status Reports for Year-to Date for October 31st, 2023. Through October 2023 the Head Start Basic grant was 49% expended and the Early Head Start Basic grant was 25% expended.

Committee Member Zina Brown-Jenkins had a question in regards of what will happen if Head Start/ Early head Start is under budget. Jennifer Tillman informed Zina Brown-Jenkins that there is going to be a budget revision and we will know how much we are going to be short.

5. WORKERS COMPENSATION POLICY RENEWAL

A. Workers Compensation Policy Renewal

Steve Warnes, Assistant Finance Director, presented the Workers Compensation Policy Renewal for 2024. The Agency is required by state law and by our contracts to have workers compensation Coverage. The Agency's risk management consultant, Heffernan insurance Brokers, has solicited quotes for the 2024 workers' compensation renewal. Quotations were received from Church Mutual- the incumbent carrier – as well as other carriers. Quotes were reviewed for both cost and service delivery desired. Based on our quotes Tanqram with \$975,023 premiums was selected. The workers compensation policy will be bound and effective jan1, 2024, to remain in compliance with California labor law.

Motion by: Itzi Robles **Second by:** Zina Brown-Jenkins

Ayes: Garabedian, Itzi Robles, Zina Brown-Jenkins

Nayes: None heard

Public Comment: None heard

No Action Required

6. TRANSIT SYSTEMS ELECTRICATION RFP

A. Nuvve Holding Corp. Proposal

Thomas Dulin, Transit System Director, presented the Nuvve Holding Corp. Proposal. On November 1st Transit System issued a request for Proposals (RFP) to hire a project manager tasked with incorporating solar panels and charging stations into their infrastructure. The Transit System 2023-24 Electrification RFP received (3) submissions. The following Agency Procurement and Procedures, a panel of reviewers reviewed, scored and discussed all qualifying submissions and subsequently recommends Nuvve Holding Corp. Nuvve's proposal with engineering by Molle received the highest score of all proposals.

Transit intends to capitalize on grants and rebates provided by the San Joaquin Valley Air Pollution Control District and Pacific Gas and Electricity. This Strategic approach aims to reduce expenses related to infrastructure enhancements and tap into additional financial incentives supporting solar Project.

Motion by: James Martinez **Second by:** Zina Brown-Jenkins

Ayes: Garabedian, James Martinez, Zina Brown-Jenkins

Nayes: None heard

Public comment: None heard.

No Action Required

HEALTH INSURANCE REPORT

A. Health Insurance Report

Steve Warnes, Assistant Finance Director, presented the health insurance report. As of October 31, 2023, the health insurance reserved is at \$7.1 million, which covers approximately 9.5 months of average expenditures. Contributions from programs and employees for 2023 total \$8,685,213 while fund paid out \$7,179,655 in expenses.

Effective January 2024: Kaiser HMO plan Offered as an alternative to our existing PPO plan. Employer and Employee premiums will increase by 8% Recordkeeping for FSA and HAS plans moved to Health Equity.

Adding Kaiser is a fixed cost option plan and will pay the Premium.

Public Comment: None heard

No Action Required

8. **NON-COMPETITIVE PROCUREMENT: N/A**

A. Non-competitive Procurement

Public Comment: None Heard

No Action Required

9. **OTHER BUSINESS: Discussion**

Public comment: None heard

No Action Required

10. **PUBLIC COMMENTS:**

Jane Thomas, Health and Dental Services Director, presented information on the proposed purchase of the Health Center Facility on behalf of Fresno EOC. The current asking price is \$1.85 Million.

Health Services Clinic does not have alternate space to relocate due to the complex standard requirements needed for a Community Health Clinic license. An OSHPD 3 facility standards will need to be met. Nonmedical facilities or new medical facilities within this area are not OSHPD 3 ready. Available facilities will require major construction modification to meet these standards.

It would benefit the Health Center to remain in its current location due to the licensing requirements. It may take a year or two to get a license for a new location. Fresno EOC Administration can meet and discuss with the owner the real estate property and negotiate a mutually agreed-purchase agreement.

Public comment: None heard

No Action Required

11. ADJOURNMENT:

Garabedian adjourned meeting at 5:46 pm

Respectfully Submitted,

Charles Garabedian
Committee Chair



PROGRAM PLANNING AND EVALUATION COMMITTEE
1920 Mariposa Street, Suite 310
Fresno, CA 93721
December 18, 2023
12:00 p.m.

MINUTES

1. CALL TO ORDER

Amy Arambula, Chair, called the meeting to order at 12:07 p.m.

2. ROLL CALL

Roll was called and a quorum was established.

Committee Members:

Amy Arambula
Alena Pacheco
Linda Hayes

Staff:

Emilia Ryes
Michelle L. Tutunjian
Karina Perez
Misty Gattie-Blanco
Andy Arredondo
Shawn Riggins

Jane Thomas
Patrick Turner
Elionora Vivanco
Ana Medina
Matt Contrestano

Teleconference (T):

N/A

Absent:

Robert Pimentel
Sherry Neil

3. APPROVAL OF NOVEMBER 27, 2023 MINUTES

A. November 27, 2023, Program Planning and Evaluation Committee Meeting Minutes

Public Comments: None heard.

Motion by: Hayes **Second by:** Pacheco

Ayes: Amy Arambula, Linda Hayes, and Alena Pacheco.

Nays: None

4. TRAINING AND EMPLOYMENT

A. Good Jobs Challenge Subrecipient Agreement

Patrick Turner, Training & Employment Services Director, provided an overview of the Good Jobs Challenge Subrecipient Agreement with Fresno Area Workforce Investment Corporation, in the amount of \$333,600 for a 42-month period.

Public Comments: None heard.

Motion by: Pacheco **Second by:** Hayes

Ayes: Amy Arambula, Linda Hayes, and Alena Pacheco.

Nays: None

5. **LOCAL CONSERVATION CORPS**

A. CalFIRE Greater Sierra Forestry Corps Contractor Agreement

Shawn Riggins, Local Conservation Corps Director, provided an overview of the CalFire Greater Sierra Forestry Corps Agreement in the amount of \$150,000.

Committee Chair Arambula inquired if the \$150,000 covered the entire cost for the 12 weeks of training for the 30 corps members. Riggins stated it covered the cost of the 4 weeks of training at the Local Conservation Corps.

Board Chair Hayes, inquired on the application process. Riggins stated that those interested in applying can apply through the Greater Sierra Forestry Corps.

Committee Chair Arambula and Board Chair Hayes inquired about the possibility to use CSBG funding to enroll more corps members. Emilia Reyes, Chief Executive Officer, recommended commissioners to refer to program dashboard to determine what is the best use of the remaining CSBG funds.

Michelle L. Tutunjian, Chief Operating Officer/Deputy CEO, will have the program director inquire with Greater Sierra Forestry Corps on the number of applications received, and the waiting list to determine the need of the community.

Public Comments: None heard.

Motion by: Hayes **Second by:** Pacheco

Ayes: Amy Arambula, Linda Hayes, and Alena Pacheco.

Nays: None

6. **HEALTH SERVICES**

A. Public Awareness and Community Outreach Campaign Services Agreement – Amendment 1

Jane Thomas, Health, and Dental Services Director provided an overview of the Public Awareness and Community Outreach Campaign Services Grant Amendment, reflecting an increase in the amount of \$62,500.

Public Comments: None heard.

Motion by: Pacheco **Second by:** Hayes

Ayes: Amy Arambula, Linda Hayes, and Alena Pacheco.

Nays: None

7. **ENERGY SERVICES**

A. 2021 Housing Rehabilitation and Home Repair Program – Onsite Monitoring Visit

Matt Contrestano, Energy Services Manager/RME, provided an overview of the City of Fresno onsite monitoring visit for the Housing Rehabilitation and Home Repair Program.

Committee Chair Arambula inquired if the Community Development Block Grant (CDBG) funding is specifically for Lead-Based Painting. Contrestano stated funding is used for energy efficiency upgrades, as well for roofing and solar panels.

Public Comments: None heard.

No action required.

8. SANCTUARY & SUPPORT SERVICES

A. Fresno County Department of Social Services Program Review

Misty Gattie-Blanco, Sanctuary Director, provided a brief overview of the Fresno County Department of Social Services Program Review along with the results and corrective action plan.

Commissioner Pacheco inquired if the contract will be renewed. Gattie-Blanco stated an RFP will be released and currently working on the process to renew.

Public Comments: None heard.

No action required.

B. Project HOPE Bridge Housing Update

Gattie-Blanco provided an update on the Project HOPE Bridge Housing for the month of November and will provide a year-end report at the February Meeting.

Public Comments: None heard.

No action required.

9. PROGRAM PLANNING & DEVELOPMENT

A. Grant Tracker

Ana Medina, Program Planning & Development Director, provided an update on the Grant Tracker for the month of December 18, 2023.

Tutunjian recommends for next year's grant tracker report to provide a summary of 2023 grants and start fresh for year 2024.

Public Comments: None heard.

No action required.

10. OTHER BUSINESS

Public Comments: None heard.

No action required.

11. PUBLIC COMMENTS

None heard.

12. ADJOURNMENT

The meeting was adjourned.

Respectfully submitted,

Amy Arambula
Committee Chair



Fresno EOC
Head Start
0 to 5

Early Care
&
Education

**COUNTY-WIDE POLICY COUNCIL (CWPC)
MINUTES
JANUARY 9, 2024**

CALL TO ORDER	The meeting was called to order at 6:06 p.m. by Fawnda Cole, CWPC Chairperson.
ROLL CALL	Roll Call was called by Aldo Alvarado Rebolledo, CWPC Secretary. The following Representatives were present: September Smith, Denise Jackson, Miroslava Woodward, Jalyssa McGill Jenkins, Erica Silva, Brian Shepherd, Cynthia Espindola, Michelle Taylor, Silvano Rebolledo, Kristin Quintero, Alma Martinez, Cristina Olea, Nobal Hernandez Diaz, Sylvia Hollins, Maria Rolon, Maria Yolanda Padilla, Joshua Barkley, Mariana Mena, Adriana Mendoza, Antonio Basilio, Rom Yoeun, Esmeralda Trejo, Brenda Bacasegua, Fawnda Cole, Ma Mendoza Estrada, Graciela Reyes Mendoza, Aldo Alvarado Rebolledo, Cienna Arder, Priscilla Thompson, Sandra Carrillo Tapia, Jessica Castillo, Karina Padilla, Veronica Cortez and Jimi Rodgers. A quorum was present.
APPROVAL OF PREVIOUS CWPC MINUTES	Fawnda Cole, CWPC Chairperson, informed Representatives of the December 5, 2023 CWPC Minutes. This information was sent to Representatives prior to tonight's meeting. <u>Motion</u> to approve the December 5, 2023 CWPC Minutes as written and read was made by Brenda Bacasegua and seconded by Mariana Mena. Motion carried.
FRESNO EOC PROGRAM REPORT – CENTRAL VALLEY AGAINST HUMAN TRAFFICKING	<p>Evelyn Gonzalez, Outreach Coordinator, stated Central Valley Against Human Trafficking works with victims of human trafficking within six counties from Kern County to Merced County. Human trafficking victims include women, men, children, immigrants, and many different demographics of individuals. Some victims experience labor trafficking and are forced to complete services or acts, and are unable to leave their situation.</p> <p>Ms. Gonzalez stated if anyone suspects an emergency human trafficking situation to call 911, but if a non-emergency situation is suspected to call the National Human Trafficking hotline at 1-888-373-7888. The hotline operates 24/7 and law enforcement will investigate and follow-up with leads. For more information or if the CWPC would like a presentation on human trafficking, they can call Ms. Gonzalez at Fresno EOC at 559-263-1379.</p> <p>Ms. Gonzalez's program supports human trafficking victims throughout the entire process until they are able to sustain themselves. They have four apartment units available for victims in need of shelter. They provide case management and go to court to advocate for victims, as well as, assist victims with obtaining benefits and financial support. Ms. Gonzalez informed the CWPC that any public recreational centers, schools, and stores such as Walmart, that have a diamond placard that has Safe Place on it, is a location in which a minor may seek help through.</p> <p>Jalyssa McGill Jenkins asked Ms. Gonzalez if she helps with services for victims after they have been rescued out of human trafficking, such as mental health services.</p> <p>Ms. Gonzalez stated yes, they continue to support victims in many ways and will even transport victims to therapy if needed.</p>
COMMUNITY REPRESENTATIVE REPORTS	No reports were provided at this time.
FRESNO EOC COMMISSIONERS' REPORT FOR THE MONTH OF NOVEMBER 2023	<p>Jimi Rodgers, EOC Commissioner, stated the report is dated October 2023 because the EOC Board would meet every other month. Due to the Board wanting to provide the CWPC and agency with timely and accurate information to ensure programmatic and fiduciary accountability, they will meet every month moving forward.</p> <p><u>Motion</u> to approve the Fresno EOC Commissioners Report for the Month of November 2023 was made by Antonio Basilio and seconded by Ma Mendoza Estrada. Motion carried.</p>

MONTHLY FINANCIAL
STATUS REPORTS (FSR)
FOR THE MONTH OF
NOVEMBER 2023

Jalyssa McGill Jenkins, CWPC Vice- Chairperson, stated this report shows expenditures for the Head Start/Early Head Start Program Basic and Trainings & Technical Assistance budgets for the month of November 2023, which also includes credit expenses as required by the Head Start Act of December 12, 2007.

Motion to approve the Monthly Financial Status Reports (FSR) for the Month of November 2023 for Head Start and Early Head Start was made by Mariana Mena and seconded by Maria Rolon. Motion carried.

AVERAGE DAILY
ATTENDANCE (ADA)
REPORTS FOR THE MONTH
OF NOVEMBER 2023 FOR
HEAD START CENTER BASE
AND EARLY HEAD START

Cynthia Espindola, Early Head Start Representative, informed Representatives of the Average Daily Attendance (ADA) Reports for the month of November 2023 for Head Start Center Base and Early Head Start. Head Start's monthly ADA for November 2023 for Center Base was 81.80%. Total number of Head Start Home Base Visits completed were 370. Early Head Start's monthly ADA for November 2023 for Center Base was 81.73%. Total number of Early Head Start Home Visits completed were 936.

Motion to approve the ADA Reports for the month of November 2023 for Head Start Center Base and Early Head Start was made by Brenda Bacasegua and seconded by Ma Mendoza Estrada. Motion carried.

FULL ENROLLMENT
INITIATIVE UPDATES

Olga Jalomo-Ramirez, Family/Community Services Manager, stated the following data reflects our recruitment efforts for the program term 2023-2024 for the Head Start 0 to 5 program. We have a total funded enrollment of 1992 in Head Start Center Base. We have a total funded enrollment of 94 in Early Head Start Center Base. We have a have a total funded enrollment of 120 in Head Start Home Base and Early Head Start Home Base has a funded enrollment of 384.

The recruitment data attached includes our recruitment efforts up to December 14, 2023. Head Start Center Base has 1436 children enrolled and Head Start Home Base has 77 children enrolled. Early Head Start Center Base has 49 children enrolled and Early Head Start Home Base has 323 children enrolled. This gives us a total of 1885 children enrolled in the Head Start 0 to 5 program.

Also, on December 14, 2023, Head Start submitted a Locally Designed Program Option (LDO) to enroll more eligible 3 years old children in the classroom. Ms. Jalomo-Ramirez will keep the CWPC updated on the status of the LDO.

IN-KIND MONTHLY STATUS
REPORT FOR THE MONTH
OF NOVEMBER 2023

Olga Jalomo-Ramirez, Family/Community Services Manager, stated Head Start's YTD In-Kind Totals for the month of November 2023 was \$750,493.51. Head Start's In-Kind totals are accumulated by classroom and non-classroom volunteer services, consultants, goods, foster grandparents, PACT Time, space and CSPP. Early Head Start's YTD In-Kind totals for the month of November 2023 was \$56,793.84. Early Head Start In-Kind totals are accumulated by home activities, literacy/growing readers and classroom/non-classroom volunteer services. The YTD Head Start 0 to 5 In-Kind totals for the months of January to November is \$5,798,939.

Failing to reach our In-Kind goal of \$8,660,339 annually may affect funding if not reached by December 31, 2023. Ms. Jalomo-Ramirez stated the program has until January 31, 2024 to enter all In-Kind totals from 2023. She will keep the CWPC updated when final calculations are complete.

PERSONNEL COMMITTEE
REPORT

Fawnda Cole, CWPC Chairperson, stated the Personnel Committee report consists of a list of: Hiring/Personnel Action Positions, Resignations/Separations, Promotion/Status Change, and Job Descriptions for Positions for the month. All promotions, transfers, separations and new hires are to be presented to the CWPC monthly, as an informational item.

FY 2024 HEAD START 0 TO
5 BUDGET PROCESS

Jennifer Tillman, Finance Manager, stated the reports attached displays the Annual Budget Preparation Process as it outlines the steps staff, parents, CWPC and Fresno EOC Board of Commissioners implement from drafting of local site budgets and submission of the continuation funding application to the Office of Head Start for final approval and award of the needed funds. There are ten steps and Representatives may review the report to understand the details of the process.

**HEAD START CENTER BASE
& HOME BASE EDUCATION
COMMITTEE PLAN PROCESS**

Ralph Carrillo, Interim ECE Coordinator and Guadalupe Zuniga, Home Base Services Manager. Ms. Zuniga stated the Head Start 0 to 5 Education Committee reviews the Educational Service Plan annually and provides input for updates and amendments. The Educational Service Plans are guides for parents and staff to incorporate all comprehensive services offered through the Head Start. The areas we focus on include the formation of Head Start 0 to 5 Education Committee parent opportunities for education input, parent opinion surveys and education services plan draft.

Mr. Carrillo displayed Franklin Head Starts Education Plan 2023-2024 to give the CWPC an example of what the plan consists of. He stated it helps parents to work with staff to revise and update the current plan at the center.

A Representative asked if staff offer services for children struggling with speech.

Mr. Carrillo replied yes, staff will individualize the Education Plan based on the child's needs. As well as, help assist parents with getting the child a referral with partners or the school district.

Ms. Cole informed the Representative they may go straight to their child's home school where they will attend elementary and inform staff they would like an IEP, in which must be completed within 60 days.

Veronica Cortez, Community Representative, clarified and stated once a parent requests an IEP in writing, staff have 15 days to respond, and the parent has another 15 days to respond after initial request, then staff has another 60 days to process the IEP.

**EARLY HEAD START CENTER
BASE & HOME BASE
CURRICULUM PLANNING
PROCESS OUTLINE**

Ralph Carrillo, Interim ECE Coordinator and Guadalupe Zuniga, Home Base Services Manager. Ms. Zuniga stated per Head Start Program Performance Standards center-base and family child care program must implement developmentally appropriate research-based early childhood curricula as appropriate that:

- (i) Based on scientific valid research and have standardized training procedures and curriculum materials to support implementation.
- (ii) Are aligned with the Head Start Learning Outcomes Framework: Ages Birth to Five.
- (iii) Have an organized developmental scope and sequence that include plans and materials for learning experiences based on developmental progression and how children learn.

Mr. Carrillo stated Center Base is utilizing Creative Curriculum 6th edition. Studies include Tubes and Tunnels, Trees and Clothes.

Ms. Pineda stated the committee is formed consisting of an ECE Specialist, HB Supervisor Center Director or Teacher Director and parents of currently enrolled children. Parents learn about the curriculum, and what goes into it the overall education process at the centers. They also learn about the assessment tools and screening tools that staff use to ensure the needs of the children are being met. The curriculum is fully aligned with DRDP and CLASS Observation tools.

**HEAD START AND EARLY
HEAD START STRENGTHS,
NEEDS AND INTERESTS
PARENT (SNIP) SURVEY**

Olga Jalomo-Ramirez, Family/Community Services Manager, and Guadalupe Zuniga, Home Base Services Manager. Ms. Zuniga stated the SNIP Survey is completed annually by Head Start 0 to 5 parents/caregivers. It is distributed at the beginning of each school year to inform staff of our family's strengths, needs and interests. This year, the SNIP Survey was sent to parents/caregivers by mail or email in September 2023. A total of 2122 was distributed, and we received a total of 1224 surveys from Center Base and Home Base program option.

Ms. Jalomo-Ramirez stated Head Start received 925 surveys in English, Spanish and Hmong. The highest need for families for food and the next need was employment. She encouraged the CWPC to review supporting documentation to view the report in full.

**SELF-ASSESSMENT DATA
REVIEW WEEK FEBRUARY
26, 28, 2024 & MARCH 1,
2024 INVITATION TO
PARTICIPATE IN SELF-
ASSESSMENT**

Veronica Galvan, Quality Assurance Manager, stated Self-Assessment II is approaching and she would like to invite the CWPC to participate. Self-Assessment is a period of monitoring each department within the program and assessing data to ensure we are providing quality services. The Triannual Self-Assessment Orientation Training will be held on February 14, 2024 and the Triannual Self-Assessment meetings will be held on February 26, 28 and March 1, 2024 in the

EOC Board Room. Ms. Galvan stated parents may sign up for the Orientation through her or Family Engagement/Volunteer Services staff.

HEAD START 0 TO 5
PROGRAM UPDATE REPORT
(PUR) FOR THE MONTH OF
NOVEMBER 2023

Rosa M. Pineda, Head Start Director, stated the information provided in the PUR is intended to keep the CWPC apprised of program activities throughout the month. She stated on November 20, 2023, Program Instruction was released indicating The Office of Head Start (OHS) has a Notice of Proposed Rulemaking (NPRM) in the Federal Register, Supporting the Head Start Workforce and Consistent Quality Programming. The OHS is soliciting feedback on the proposed changes and will use comments submitted by the public in making decisions for the final rule. This will affect the program the proposed revisions would ensure OHS provides clear federal requirements for wages and benefits to support the Head Start workforce, better integration of mental health into all levels of Head Start programming, and enhanced standards in other service areas to promote quality improvement and clarity of requirements. Ms. Pineda informed the CWPC a link will be shared through ChildPlus so that they may access the information.

LOCALLY DESIGNED
PROGRAM OPTION

Rosa M. Pineda, Head Start Director, stated she asked the OHS through Head Start 0 to 5's Region IX Specialist if the program may receive a waiver to increase the amount of 3-year old children from 17 to 20. According to the Community Assessment, there are a total of 33,193 three and four-year old children in Fresno County and 14,120 are 3 years old. Currently we have 230 three-year-old children on the waitlist, 192 three-year-old online referrals, 127 three-year-old incomplete applications, and 33 Early Head Start transitions. The waiver is intended for 17 Head Start sites and 20 predominantly three-year-old classes.

BUDGET MODIFICATION
JANUARY 1, 2023
THROUGH DECEMBER 31,
2023

Rosa Pineda, Head Start Director, stated the federal government provides funds each year for the Fresno EOC Head Start 0 to 5 program. The program experienced savings in the Basic 2023 Budgets that equal more than \$250,000, thus mandating a formal budget revision to be request from Region IX staff prior to expenditure of these funds for new purposes. These savings are due in large part to numerous personnel vacancies and Leaves of Absence (LOA's) in 2023.

On December 31, 2023, staff submitted the budget modification onto the Head Start Enterprise System (HSES) for Head Start 0 to 5 FY 2023 budget for a total of \$9,650,853 to reallocate the unspent program funds to other expenditures in FY 2024. These changes will assist in the full implementation of our program and School Readiness Goals by providing additional resources for children's learning (books), maintenance and repair for program sites to improve the environments for children, families and staff. Some repairs include ruff repairs, new floors, car coverings for the parking lot, sandbox upgrades, etc. Ms. Pineda will keep the CWPC informed of the response from Region IX.

ANNOUNCEMENTS

Priscilla Thompson, Historian, made the following Announcements:

- A. January 15, 2024 – Martin Luther King Jr. Day Holiday – No School
- B. February 6, 2024 – Next County-Wide Policy Council Meeting at 6:00 p.m.

Floro Trujillo, Family Engagement/Volunteer Services Coordinator, informed the CWPC that the Governance Training makeup is coming up on Wednesday, January 24, 2024 and flyers are available. If parents are interested they can complete the bottom section of the flyer and return to staff.

ADJOURNMENT

There being no further business to discuss, motion to adjourn meeting was made by Mariana Mena and seconded by Joshua Barkley. Motion carried.

The meeting adjourned at 7:38 p.m.

Submitted By:

Brionna Warren
Secretary I

(CWPC MINUTES JANUARY 9 2024 FINAL) bw 1/16/24 ~ CWPC (2023-2024 (CWPC MINUTES) ~

EXECUTIVE COMMITTEE MEETING
February 5, 2024 at 5:30 PM
1920 Mariposa Street, Suite 310
Fresno, CA 93721

MINUTES

1. CALL TO ORDER

Oliver Baines, Chair, called the meeting to order at 5:32 p.m.

2. ROLL CALL

Roll was called and a quorum was established.

Committee Members:

Oliver Baines
Robert Pimentel
Jimi Rodgers
Any Arambula
Earl Brown
Charles Garabedian
Alyssia Bonner
Linda Hayes
Lisa Michell

Staff:

Emilia Reyes
Kenneth Price
Jay Zapata
Misty Gattie-Blanco
Angela
Annette
Rosa Pineda
Ana Medina
Michelle L. Tutunjian
Karina Perez
Jack Lazzarini
Sherry Neil
Elionora Vivanco

Pension Representatives:

Fred Hamaseyah
Ryan Louie

Teleconference (T):

N/A

Absent:

N/A

3. APPROVAL OF PREVIOUS MINUTES

- A. December 4, 2023 Human Resources Meeting Minutes
- B. December 13, 2023 Finance Committee Meeting Minutes
- C. December 18, 2023 Program Planning and Evaluation Committee Meeting Minutes

Public Comments: None heard.

Motion by: Hayes **Second by:** Arambula

Ayes: Oliver Baines, Robert Pimentel, Jimi Rodgers, Any Arambula, Earl Brown, Charles Garabedian, Alyssia Bonner, Linda Hayes, and Lisa Michell.

Nays: None

4. FINANCIAL REPORT

Jay Zapata, Chief Financial Officer, presented the Financial Statements for Year-to Date for November and December of 2023. Through November 2023 the Total Revenues and Support are \$152,635,085 and Total Expenditures are \$156,264,363, and through December 2023 the Total Revenues and Support are \$169,138,029 and Total Expenditures are \$173,130,001.

The Committee and staff engage in further discussion regarding the best interest for Transit Systems to purchase or lease electric vehicles due to the constant change in technology.

Angela Riofrio, Finance Director, presented the Head Start Financial Status Reports for Year-to Date for November and December 2023.

Emilia Reyes, Chief Executive Officer, recommends the Financial Staff Reports to include a detailed narrative ahead of time and continue to include the reports for review.

Public Comments: None heard.

Motion by: Hayes **Second by:** Michell

Ayes: Oliver Baines, Robert Pimentel, Jimi Rodgers, Any Arambula, Earl Brown, Charles Garabedian, Alyssia Bonner, Linda Hayes, and Lisa Michell.

Nays: None

5. INVESTMENT REPORT

Steve Warnes, Assistant Finance Director, presented the Investment Report for December 31, 2022. In the past the reports will show both Wells Fargo and Citibank investment holding balance however, the Citibank investment account has been closed due to ties to Access Pluss Capital activities.

At this time the total investment account held at \$3,631,979 in Cash, Bonds, and CDs. Total annual interest expected from these fixed income investments is \$66,451 providing an average rate of 3.05%.

Retirement Representative Fred Hamaseyah, and Ryan Louie provide a brief overview of the Retirement Plan and the 403B quarterly reports. Hamaseyah stated the agency invests 5% of the investment after six months of employment and encourages staff to invest 10% for retirement.

Public Comments: None heard.

No action required.

6. HEALTH INSURANCE REPORT

Warnes, presented the Health Insurance report. As of December 31, 2023, the health insurance reserved is at \$7.0 million, which covers approximately 9.4 months of average expenditures. Contributions from programs and employees for 2023 total \$10,492,156 while fund paid out \$8,969,677 in expenses.

Public Comments: None heard.

No action required.

7. EMPLOYEE POLITICAL & ADVOCACY ACTIVITIES POLICY

Kenneth Price, Legal Counsel, provided an overview of the Employee Political & Advocacy Activities Policy red line revision with recommended changes.

Upon further discussion the Committee made a motion to approve the policy with the following revision to state "*Electioneering: For the purposes of this policy, "Electioneer" or "Electioneering" is defined as any activity designed to persuade people to vote for a specific candidate for office, statewide or local ballot measure.*"

Public Comments: Annette Thornton, WIC Director, stated concern with the Electioneering Policy "registering voters" as to WIC staff help clients to register to vote. Price stated he will revise it to state "partisan resisting to vote".

Motion by: Brown **Second by:** Hayes

Ayes: Oliver Baines, Robert Pimentel, Jimi Rodgers, Any Arambula, Earl Brown, Charles Garabedian, Alyssia Bonner, Linda Hayes, and Lisa Michell.

Nays: None

8. HUMAN RESOURCES QUARTERLY SUMMARY REPORT

Nelson Dibie, Human Resources Officer, provided a brief overview of the Human Resources Quarterly Summary. Commissioner Arambula inquired clarification regarding the Demographics chart as to what does “CA Pay Data 2021” means. Dibie stated the number of percentages of employees hire in the State of California for the year 2021. Commissioner Brown stated concern of the outdated Data comparison presented. Dibie stated the State of California hasn’t release any new date since 2021.

Commissioner Brown recommended comparison data with the County instead of the State of California. Dibie, stated will provide moving forward.

Commissioner Arambula recommend the “Time to Hire/Time to Fill Report” to be regrouped by programs. Dibie, stated will do.

Public Comments: None heard.

No action required.

9. SANCTUARY AND SUPPORT SERVICES

A. Project HOPE Bridge Housing Update

Misty Gattie-Blanco, Sanctuary Director provided a year-end report of the Project HOPE Bridge Housing.

Public Comments: None heard.

No action required.

10. WOMEN, INFANTS & CHILDREN

A. Program Monitoring Review

Thornton provided an overview of the California Department of Public Health program monitoring review and corrective action plan for the two findings.

Public Comments: None heard.

No action required.

11. PROGRAM PLANNING & DEVELOPMENT

A. Grant Tracker

Ana Medina, Program Planning & Development Director provide an update and highlighted the following two funded grants, as well as the year-end summary report:

1. Sanctuary and support Services: Y23 Continuum of Care Competition and Renewal or Replacement of Youth Homeless Demonstration Program Grants
2. Training & Employment: One Fresno Youth Jobs Corps Program Worksites

Commissioner Mitchell recommended monthly Legislative Reports to see if any funding may be impacted.

Commissioner Brown inquired as to why some grants did not get funded. Medina provides an explanation.

Reyes stated moving forward a detailed staff report will be presented with the highlights of submitted, pending, and not funded grants along with the summary report.

Reyes will provide an overview of the 2024 Agency-Wide Priorities at the February Board Training to ensure they align with Commissioner request.

Public Comments: None heard.

No action required.

12. VALLEY APPRENTICESHIP CONNECTIONS (VAC)

Patrick Turner, Training & Employment Services Director, shared the upcoming project for VAC students to build tiny homes.

Public Comments: None heard.

No action required.

13. OTHER BUSINESS

Reyes announced Commissioners Zina Brown-Jenkins, Rey Leon, Bruce McAlister, and Brian King have been appointed to the Guaranteed Income Program Adhoc Meeting.

No action required.

14. PUBLIC COMMENTS

Thornton provided an overview of the Woman, Infants, and Children Strategic Program Progress Report for the School year 1 - 2023.

Dibie, shared with Commissioners and Staff the Black History Month Celebration taking place on Thursday, February 22, 2024, from 11:30 a.m. – 2:30 p.m. at the Executive Plaza Courtyard.

15. ADJOURNMENT

The meeting was adjourned.

Respectfully submitted,

Oliver Baines
Committee Chair



**COUNTY-WIDE POLICY COUNCIL (CWPC)
MINUTES
FEBRUARY 6, 2024**

CALL TO ORDER	The meeting was called to order at 6:03 p.m. by Fawnda Cole, CWPC Chairperson.
ROLL CALL	Roll Call was called by Fawnda Cole, CWPC Chairperson. The following Representatives were present: Blanca Valladolid, Marylou Ruiz, Betsaida Ledesma, Zittaly Alvarez, Jalyssa McGill Jenkins, Erica Silva, Jeanette Trejo, Jonathan Cole, Silvano Rebolledo, Sabrina Vega, Alma Martinez, Jasmine Arreola, Cristina Olea, Sylvia Hollins, Maria Yolanda Padilla, Joshua Barkley, Mariana Mena, Latrice Turton, Gloria Martinez, Catalina Leon, Antonio Basilio, Rom Yoeun, Esmeralda Trejo, Clarissa Varela, Denise Rangel, Fawnda Cole, Graciela Reyes Mendoza, Destiny Campos, Natasha Chalk, Genesis Heredia, Karina Padilla, Veronica Cortez, Natasha Goins, Maria Rodriguez-Lopez, Steven Taylor, Jimi Rodgers and Zina Brown-Jenkins. A quorum was present.
APPROVAL OF PREVIOUS CWPC MINUTES	<p>Fawnda Cole, CWPC Chairperson, informed Representatives of the January 9, 2024 CWPC Minutes. This information was sent to Representatives prior to tonight's meeting.</p> <p><u>Motion</u> to approve the January 9, 2024 CWPC Minutes as written and read was made by Joshua Barkley and seconded by Mariana Mena. Motion carried.</p>
FRESNO EOC PROGRAM REPORT – HOUSING & SHELTER	No reports at this time.
COMMUNITY REPRESENTATIVE REPORTS	No reports at this time.
FRESNO EOC COMMISSIONERS' REPORT FOR THE MONTH OF DECEMBER 2023	<p>Zina Brown-Jenkins, Fresno EOC Commissioner, stated the below was discussed and mentioned during the Fresno EOC Board of Commissioners meeting that took place December 7, 2023:</p> <ul style="list-style-type: none"> A. Commissioner Appreciation <ul style="list-style-type: none"> - Chair Hayes thanked the following previous Commissioners for their years of services as Fresno EOC Board members: Itzi Robles and Ruben Zarate and provided them with a plaque of appreciation. B. Financial Reports <ul style="list-style-type: none"> - The Chief Financial Officer, Jay Zapata, presented a detailed report of the Agency's Financial statements and the Head Start (HS) Financial Status Report as of Year-to-Date for September 2023. Commissioner Garabedian stated in order to be in compliance with the CSBG Standards, the Board of Commissioners will receive financial reports updates at each regular Board meeting. C. 2024 CSBG Budget <ul style="list-style-type: none"> - The Chief Financial Officer, Jay Zapata, provided a detailed overview of the proposed 2024 CSBG Budget, itemizing the funds for the Agency's Focus Area and the Strategic Goals & Objectives. Commissioner Arambula inquired about the possibility of providing an update mid-year of unspent funds and allocating funds towards CAP60. Emilia Reyes, Chief Executive Officer, stated an update will be provided mid-year at the Executive Committee Meeting. D. Program Dashboard and Impact Report – School of Unlimited Learning (SOUL) <ul style="list-style-type: none"> - Susan Lopez, Principal of SOUL, provided a detailed report of CAP60 preview Data Visualization Dashboard of SOUL's 2022/2023 School Year fund Impact Report. Commissioner Jaime-Mileham and Arambula continued in further discussion of additional features the database should capture. <p><u>Motion</u> to approve the Fresno EOC Commissioners Report for the Month of December 2023 was made by Mariana Mena and seconded by Rom Yoeun. Motion carried.</p>
MONTHLY FINANCIAL STATUS REPORTS (FSR)	Jennifer Tillman, Finance Manager, stated staff recommends to accept the Head Start and Early Head Start's (EHS) Monthly Financial Status Report for the month of December 2023.

FOR THE MONTH OF
DECEMBER 2023

This funding will support personnel and operating expenses totaling \$42,804,497 (\$35,059,099 – HS \$7,745,398 – EHS), and the Non-Federal Share match is \$8,560,900 (\$7,011,820 – HS - \$1,549,080 – EHS) for the Fiscal year.

To accurately capture all expenditures incurred during the month of December 2023 and update the remaining balances, we aim to provide a comprehensive reflection of the financial activity. This assessment will help determine whether there are any unobligated funds remaining in the grant for the year 2023. If there are any unobligated funds we will need to reallocate the funds in the budget revision.

Motion to approve the Monthly Financial Status Reports (FSR) for the Month of December 2023 was made by Jalyssa McGill Jenkins and seconded by Betsaida Ledesma. Motion carried.

IN-KIND MONTHLY STATUS
REPORT FOR THE MONTH
OF DECEMBER 2023

Jennifer Tillman, Finance Manager, stated the Monthly In-Kind Report for the month of December 2023 consists of \$577,044 (HS) which is accumulated by classroom and non-classroom volunteer services, consultants, goods, foster grandparents, PACT Time, space, and CSPP. Early Head Start's In-Kind Status Report for the month of December 2023 is \$230,944 which is accumulated by home activities, literacy/growing readers and classroom and non-classroom volunteer services.

The Fiscal Impact Year to Date for HS and EHS from January to December 2023 is \$7,546,188 (\$5,744,036 – HS; \$1,802,152 – EHS). Which results in a shortage of \$3,279,236.

In conclusion, failing to reach our In-Kind goal of \$10,825,424 annually for the 2023 fiscal year, may affect funding. However, we have the ability to request a non-federal share waiver for the unmatched funds.

Ms. Brown-Jenkins stated in the past there were incentives for parents who volunteered and did exceptionally well with In-Kind hours. She asked if those incentives could be put back in place.

Rosa M. Pineda, Head Start Director, stated the Volunteer Luncheon was placed on hold during COVID-19; however, it reconvened last year and all top volunteers were invited. The Luncheon will continue to take place each year moving forward.

AVERAGE DAILY
ATTENDANCE (ADA)
REPORTS FOR THE MONTH
OF DECEMBER 2023 FOR
HEAD START AND EARLY
HEAD START

Jalyssa McGill Jenkins, CWPC Vice-Chairperson, informed Representatives of the Average Daily Attendance (ADA) Reports for the month of December 2023 for Head Start and Early Head Start. Head Start's monthly ADA for December 2023 for Center Base was 78.74%. Total number of Head Start Home Base Visits completed were 143. Early Head Start's monthly ADA for December 2023 for Center Base was 77.89%. Total number of Early Head Start Home Visits completed were 494.

Motion to approve the ADA Reports for the month of December 2023 for Head Start and Early Head Start was made by Clarissa Varela and seconded by Rom Yoeun. Motion carried.

HEAD START 0 TO 5
PROGRAM UPDATE REPORT
(PUR) FOR THE MONTH OF
DECEMBER 2023

Rosa M. Pineda, Head Start Director, stated the PUR is a document written to provide monthly updates to the Board and CWPC. Ms. Pineda stated Head Start 0 to 5's contractor is working on submitting the blue prints to the city of Mendoza in regards to the Amor EHS center in Selma. Once we receive the City's approval for the project, we will begin the remodeling project.

Ms. Pineda stated the Office of Head Start (OHS) opened a notice or proposed rulemaking (NPRM) to the public for feedback/comments. This was in regards to making changes to the Head Start Program Performance Standards (HSPPS). The public feedback/comments are no longer available since January 19, 2024. Ms. Pineda will keep the CWPC updated on the status of the HSPPS changes.

Motion to approve the Head Start 0 to 5 PUR For the Month of December 2023 was made by Betsaida Ledesma and seconded by Mariana Mena. Motion carried.

HEAD START 0 TO 5
SELECTION CRITERIA

Olga Jalomo-Ramirez, Family/Community Services Manager, stated the HSPPS states every year the program must review and/or revise our Selection Criteria. The Selection Criteria allows our program to identify and enroll children who are most in need of Head Start services. On October 18, 2023, November 8, 2023, December 6, 2023, and January 10, 2024, staff met with the Eligibility Recruitment Selection Enrollment and Attendance (ERSEA) Committee to review and discuss the Selection Criteria to determine if any changes or amendments were necessary. There

were no changes identified, so the Head Start 0 to 5 Selection Criteria will move forward for full Board consideration at the Commission Meeting.

Motion to approve the Head Start 0 to 5 Selection Criteria was made by Betsaida Ledesma and seconded by Mariana Mena. Motion carried.

FULL ENROLLMENT INITIATIVE UPDATES

Olga Jalomo-Ramirez, Family/Community Services Manager, stated on March 24, 2023 we received a letter from the Regional Program manager of Office of Head Start letting us know that we are under-enrolled under the criteria listed in the Head Start Act.

We have a total funded enrollment of 1992 in Head Start Center Base. We have a total funded enrollment of 94 in Early Head Start Center Base. We have a total funded enrollment of 120 in Head Start Home Base. Early Head Start Home Base has a funded enrollment of 384.

The recruitment data attached in the packet includes our recruitment efforts up to January 25, 2024. Head Start Center Base has 1463 children enrolled and Head Start Home Base has 80 children enrolled. Early Head Start Center Base has 44 children enrolled and Early Head Start Home Base has 325 children enrolled. This gives us a total of 1912 children enrolled in Head Start 0 to 5. We continue to identify age eligible siblings of Head Start 0 to 5 and reaching out to Community Partners to let them know we are actively recruiting children.

Maria Yolanda Padilla, CWPC Representative, asked if low enrollment is due to low staffing.

Ms. Jalomo-Ramirez stated yes, we still need Family Services Specialists, Family Support Assistants, Teacher Assistants, and Teachers, and it does affect our enrollment due to meeting proper student/teacher ratios. She stated if the OHS approves the FEI plan then more 3-year old's may be enrolled in the classrooms, 20 instead of 17, and it can add 200 more children in to Head Start 0 to 5.

PERSONNEL COMMITTEE REPORT

Jalyssa Jenkins, Vice-Chairperson, stated the Personnel Committee report consists of a list of: Hiring/Personnel Action Positions, Resignations/Separations, Promotion/Status Change, and Job Descriptions for Positions for the month. All promotions, transfers, separations and new hires are to be presented to the CWPC monthly, as an informational item.

During the month of January 2024, six (6) New Hires were onboarded and five (5) potential New Hires are in the hiring process pending fingerprint clearance. Head Start 0 to 5 is working alongside Fresno EOC Human Resources Department to implement a new process to expedite the interview and hiring process to fill open vacancies in a timely manner.

ANNUAL SUMMARY OF SELF-ASSESSMENT DECISIONS 2023-2024

Veronica Galvan, Quality Assurance Manager, stated per HSPPS we must effectively oversee progress towards program goals on an ongoing basis. We conduct a self-assessment and analyze our qualitative and quantitative data three times a year, November, February and May. Staff complete monitoring and obtain reports to check if program goals have been met. The packet displays a birds-eye-view of what is conducted during Self-Assessment. Staff invites Parent's/Guardian's and Board Commissioners to participate and together, they identify strengths and areas for continuous improvement, when necessary.

ANNOUNCEMENTS

Fawnda Cole, CWPC Chairperson, made the following Announcements:

- A. February 12, 2024 – Lincoln's Day Holiday – No School
- B. February 19, 2024 – President's Day Holiday – No School
- C. March 5, 2024 – Next County-Wide Policy Council Meeting at 5:30 p.m.

ADJOURNMENT

There being no further business to discuss, motion to adjourn meeting was made by and Joshua Barkley and seconded by Marian Mena. Motion carried.

The meeting adjourned at 7:04 p.m.

Submitted By:

Brionna Warren
Secretary I



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Finance
Consent Agenda Item #: 8VIII	Director: Steve Warnes
Subject: Agency Financial and Head Start Financial Status Report November/December 2023	Officer: Jay Zapata

Recommended Action

Executive Committee recommends approval for full Board consideration of the interim consolidated financial statements and Head Start 0-5 Financial status report as of Year-to-Date November 2023 and December 2023.

Background

In accordance with the Agency's bylaws, the Finance Committee shall advise in the preparation and administration of the operating budget and oversee the administration, collection, and disbursement of the financial resources of the organization. Additionally, the Treasurer is to ensure the commissioners understand the financial situation of the organization, which includes ensuring that financial statements for each month are available for each meeting of the Board of Commissioners. Monthly financials for Fresno EOC (consolidated) and for Head Start are provided for review and acceptance.

Fiscal Impact

(A) Agency Statement of Activities and Statement of Financial Position:

As of November 30, 2023, the Agency had preliminary revenue of \$152,635,085 million, including \$45.2 million of in-kind contributions, and net operating loss of \$3.8M. In comparison, the Agency had revenue of \$131,400,178 including in-kind of \$26 million as of the corresponding period of the preceding year.

As of December 31, 2023, the Agency had preliminary revenue \$169,138,029 million, including \$52.6 million of in-kind contributions, and net operating loss of \$3,390,709.

In comparison, the Agency had revenue of \$148,009,888 including in-kind of \$41.5 million as of the corresponding period of the preceding year.

(B) Head Start 0-5 Financial Status Report as of Year-to-December 31,
2023 represented in the following percentages.

Program Area	% of budget
Head Start – Basic	90%
Head Start – Training & Technical Assistance (T&TA)	70%

Program Area	% of budget
Early Head Start – Basic	60%
Early Head Start – T&TA	27%

Conclusion

If accepted by the Board, these financials by the Board documents the Board's oversight over the financial operations of Fresno EOC. This is part of the Board's fiduciary duty.

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF ACTIVITIES
For The Eleven Month Period Ended November 30, 2023 and 2022

	A	B	A - B	C	D	B - D
	BUDGET JAN - DEC 2023	ACTUAL NOVEMBER 2023	BUDGET BALANCE REMAINING	ACTUAL JAN - DEC 2022	ACTUAL NOVEMBER 2022	ACTUAL 2023 vs 2022 Differences
REVENUES AND SUPPORT						
GRANT REVENUE	\$ 105,694,129	\$ 79,053,122 75%	\$ 26,641,007	79,753,909	\$ 69,630,320	9,422,801
GRANT REVENUE - LENDING CAPITAL	-	-	-	0	-	-
CHARGES FOR SERVICES	22,652,580	23,283,800 103%	(631,220)	21,276,472	19,459,349	3,824,451
OTHER PROGRAM REVENUE	4,998,245	2,766,161 55%	2,232,084	3,459,716	3,183,106	(416,945)
CONTRIBUTIONS	384,300	106,129 28%	278,171	209,416	201,734	(95,605)
MISCELLANEOUS INCOME	759,253	920,556 121%	(161,303)	165,604	139,034	781,522
INTEREST & INVESTMENT INCOME	106,000	109,354 103%	(3,354)	53,391	29,149	80,204
AFFILIATE INTEREST INCOME	765,250	756,052 99%	9,198	1,172,129	932,518	(176,466)
RENTAL INCOME	265,843	346,101 130%	(80,258)	385,663	358,900	(12,799)
TOTAL CASH REVENUE	\$ 135,625,600	\$ 107,341,275 79%	\$ 28,284,325	\$ 106,476,300	\$ 93,934,111	13,407,163
IN KIND REVENUE	\$ 39,637,875	\$ 45,293,810 114%	\$ (5,655,935)	41,533,588	\$ 37,466,067	7,827,743
TOTAL REVENUE & SUPPORT	175,263,475	152,635,085 87%	22,628,390	148,009,888	131,400,178	21,234,906
EXPENDITURES						
PERSONNEL COSTS	\$ 75,447,335	\$ 64,691,816 86%	\$10,755,519	66,070,751	\$ 58,930,053	5,761,762
ADMIN SERVICES	8,056,855	6,919,962 86%	1,136,893	6,637,808	5,701,953	1,218,009
PROFESSIONAL SERVICES - AUDIT	0	0 0%	0	0	0	-
CONTRACT SERVICES	11,711,120	10,097,444 86%	1,613,676	10,718,245	9,069,100	1,028,343
FACILITY COSTS	5,770,460	5,999,680 104%	(229,220)	6,096,789	5,504,976	494,703
TRAVEL, MILEAGE, VEHICLE COSTS	4,737,815	3,042,504 64%	1,695,311	3,070,704	2,877,729	164,775
EQUIPMENT COSTS	973,690	2,074,994 213%	(1,101,304)	1,408,467	1,353,603	721,391
DEPRECIATION - AGENCY FUNDED	296,000	269,189 91%	26,811	277,232	252,931	16,258
OFFICE EXPENSE	3,199,720	3,853,965 120%	(654,245)	3,448,422	2,957,753	896,212
INSURANCE	660,930	895,905 136%	(234,975)	809,767	740,929	154,977
PROGRAM SUPPLIES & CLIENT COSTS	23,493,815	12,313,035 52%	11,180,780	9,280,593	8,286,128	4,026,907
INTEREST EXPENSE	458,096	370,000 81%	88,096	446,995	347,394	22,606
OTHER COSTS	638,159	442,061 69%	196,098	1,389,253	1,194,075	(752,014)
TOTAL CASH EXPENDITURES	\$ 135,443,995	\$ 110,970,553 82%	\$ 24,473,442	109,655,026	\$ 97,216,625	13,753,929
IN KIND EXPENSES	\$ 39,637,875	\$ 45,293,810 114%	\$ (5,655,935)	\$ 41,533,588	\$ 37,466,067	7,827,743
TOTAL EXPENDITURES	175,081,870	156,264,363 89%	18,817,507	151,188,614	134,682,692	21,581,671
OPERATING SURPLUS (DEFICIT)	\$ 181,605	\$ (3,629,278)	\$ 3,810,883	\$ (3,178,726)	\$ (3,282,513)	(346,765)
OTHER INCOME / EXPENSE						
TRANSIT GRANT ASSET DEPRECIATION		189,690	(189,690)	211,983	194,318	(4,627)
NET SURPLUS (DEFICIT)	\$ 181,605	(\$3,818,969)	4,000,574	\$ (3,390,709)	(\$3,476,831)	(342,138)

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF FINANCIAL POSITION
As of November 30, 2023

	2023	2022	Differences
ASSETS			
CASH & INVESTMENTS	\$ 12,024,385	\$ 21,462,651	\$ (9,438,266)
ACCOUNTS RECEIVABLE	17,256,214	15,155,061	2,101,153
PREPAIDS/DEPOSITS	730,407	325,493	404,913
INVENTORIES	277,968	352,837	(74,869)
PROPERTY, PLANT & EQUIPMENT	14,659,871	12,404,472	2,255,399
NOTES RECEIVABLE (net)	19,320,477	16,202,659	3,117,817
TOTAL ASSETS	\$ 64,269,321	\$ 65,903,173	\$ (1,633,852)
LIABILITIES			
ACCOUNTS PAYABLE	\$ 4,130,770	\$ 4,349,588	\$ (218,818)
ACCRUED PAYROLL LIABILITIES	6,363,462.86	5,087,099	1,276,364
DEFERRED REVENUE	3,423,068	3,573,019	(149,951)
NOTES PAYABLE	15,107,382	16,857,268	(1,749,886)
HEALTH INSURANCE RESERVE	7,087,362	5,379,752	1,707,610
OTHER LIABILITIES	4,119,549	4,235,805	(116,256)
TOTAL LIABILITIES	\$ 40,231,594	\$ 39,482,532	\$ 749,062
FUND BALANCE			
CURRENT OPERATING EARNINGS (YTD)	\$ (3,629,278)	\$ (3,282,513)	\$ (346,765)
UNRESTRICTED NET ASSETS	16,998,289	20,350,226	(3,351,936)
REVOLVING LOAN FUND	556,268	556,268	0
INVESTMENT IN GENERAL FIXED ASSETS	10,112,447	8,796,659	1,315,788
TOTAL FUND BALANCE	\$ 24,037,727	\$ 26,420,640	\$ (2,382,913)
TOTAL LIABILITIES AND FUND BALANCE	\$ 64,269,321	\$ 65,903,173	\$ (1,633,852)

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF ACTIVITIES
For The Twelve Month Period Ended December 31, 2023 and 2022

	A	B	A - B	C	D	B - D
	BUDGET JAN - DEC 2023	ACTUAL DECEMBER 2023	BUDGET BALANCE REMAINING	ACTUAL JAN - DEC 2022	ACTUAL DECEMBER 2022	ACTUAL 2023 vs 2022 Differences
REVENUES AND SUPPORT						
GRANT REVENUE	\$ 105,694,129	\$ 86,311,936 82%	\$ 19,382,193	79,753,909	\$ 79,753,909	6,558,026
GRANT REVENUE - LENDING CAPITAL	-	-	-	0	-	-
CHARGES FOR SERVICES	22,652,580	24,918,337 110%	(2,265,757)	21,276,472	21,276,472	3,641,865
OTHER PROGRAM REVENUE	4,998,245	2,951,641 59%	2,046,604	3,459,716	3,459,716	(508,075)
CONTRIBUTIONS	384,300	116,860 30%	267,440	209,416	209,416	(92,556)
MISCELLANEOUS INCOME	759,253	922,493 122%	(163,240)	165,603	165,603	756,889
INTEREST & INVESTMENT INCOME	106,000	134,991 127%	(28,991)	53,391	53,391	81,600
AFFILIATE INTEREST INCOME	765,250	756,052 99%	9,198	1,172,129	1,172,129	(416,077)
RENTAL INCOME	265,843	368,618 139%	(102,775)	385,663	385,663	(17,046)
TOTAL CASH REVENUE	\$ 135,625,600	\$ 116,480,927 86%	\$ 19,144,673	\$ 106,476,300	\$ 106,476,300	10,004,627
IN KIND REVENUE	\$ 39,637,875	\$ 52,657,103 133%	\$ (13,019,228)	41,533,588	\$ 41,533,588	11,123,515
TOTAL REVENUE & SUPPORT	175,263,475	169,138,029 97%	6,125,446	148,009,888	148,009,888	21,128,141
EXPENDITURES						
PERSONNEL COSTS	\$ 75,447,335	\$ 70,833,954 94%	\$4,613,381	66,070,751	\$ 66,070,751	4,763,204
ADMIN SERVICES	8,056,855	7,278,403 90%	778,452	6,637,808	6,637,808	640,595
PROFESSIONAL SERVICES - AUDIT	0	0 0%	0	0	0	-
CONTRACT SERVICES	11,711,120	10,594,413 90%	1,116,707	10,718,245	10,718,245	(123,831)
FACILITY COSTS	5,770,460	6,444,884 112%	(674,424)	6,096,789	6,096,789	348,095
TRAVEL, MILEAGE, VEHICLE COSTS	4,737,815	3,248,366 69%	1,489,450	3,070,704	3,070,704	177,662
EQUIPMENT COSTS	973,690	2,146,174 220%	(1,172,484)	1,408,467	1,408,467	737,707
DEPRECIATION - AGENCY FUNDED	296,000	293,861 99%	2,139	277,232	277,232	16,629
OFFICE EXPENSE	3,199,720	4,284,681 134%	(1,084,961)	3,448,422	3,448,422	836,259
INSURANCE	660,930	972,297 147%	(311,367)	809,767	809,767	162,530
PROGRAM SUPPLIES & CLIENT COSTS	23,493,815	13,433,542 57%	10,060,273	9,280,593	9,280,593	4,152,949
INTEREST EXPENSE	458,096	372,411 81%	85,685	446,995	446,995	(74,584)
OTHER COSTS	638,159	569,913 89%	68,246	1,389,253	1,389,255	(819,342)
TOTAL CASH EXPENDITURES	\$ 135,443,995	\$ 120,472,898 89%	\$ 14,971,097	109,655,026	\$ 109,655,026	10,817,872
IN KIND EXPENSES	\$ 39,637,875	\$ 52,657,103 133%	\$ (13,019,228)	\$ 41,533,588	\$ 41,533,588	11,123,515
TOTAL EXPENDITURES	175,081,870	173,130,001 99%	1,951,869	151,188,614	151,188,614	21,941,387
OPERATING SURPLUS (DEFICIT)	\$ 181,605	\$ (3,991,971)	\$ 4,173,576	\$ (3,178,726)	\$ (3,178,726)	(813,246)
OTHER INCOME / EXPENSE						
TRANSIT GRANT ASSET DEPRECIATION		206,584	(206,584)	211,983	211,983	(5,399)
NET SURPLUS (DEFICIT)	\$ 181,605	(\$4,198,556)	4,380,161	(\$3,390,709)	(\$3,390,709)	(807,847)

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF FINANCIAL POSITION
As of December 31, 2023

	2023	2022	Differences
ASSETS			
CASH & INVESTMENTS	\$ 11,628,890	\$ 19,224,232	\$ (7,595,342)
ACCOUNTS RECEIVABLE	17,406,650	20,825,982	(3,419,332)
PREPAIDS/DEPOSITS	768,938	411,492	357,445
INVENTORIES	278,876	162,532	116,344
PROPERTY, PLANT & EQUIPMENT	14,521,963	13,821,551	700,412
NOTES RECEIVABLE (net)	19,320,477	15,160,597	4,159,880
TOTAL ASSETS	\$ 63,925,794	\$ 69,606,386	\$ (5,680,592)
LIABILITIES			
ACCOUNTS PAYABLE	\$ 4,523,551	\$ 8,654,653	\$ (4,131,103)
ACCRUED PAYROLL LIABILITIES	6,608,692.31	5,865,829	742,863
DEFERRED REVENUE	2,995,368	3,705,074	(709,705)
NOTES PAYABLE	15,092,144	14,663,841	428,303
HEALTH INSURANCE RESERVE	7,016,388	4,678,993	2,337,395
OTHER LIABILITIES	4,119,549	4,178,397	(58,848)
TOTAL LIABILITIES	\$ 40,355,692	\$ 41,746,788	\$ (1,391,096)
FUND BALANCE			
CURRENT OPERATING EARNINGS (YTD)	\$ (3,991,971)	\$ (3,178,726)	\$ (813,246)
UNRESTRICTED NET ASSETS	16,989,699	20,261,476	(3,271,777)
REVOLVING LOAN FUND	556,268	556,268	0
INVESTMENT IN GENERAL FIXED ASSETS	10,016,105	10,220,578	(204,472)
TOTAL FUND BALANCE	\$ 23,570,101	\$ 27,859,597	\$ (4,289,495)
TOTAL LIABILITIES AND FUND BALANCE	\$ 63,925,794	\$ 69,606,386	\$ (5,680,592)

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
November 30, 2023

Description	Head Start - Basic				Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining
Personnel	\$17,232,920	\$1,624,184	\$14,968,756	\$2,264,164				
Fringe Benefits	7,582,485	518,251	5,204,399	2,378,086				
Total Personnel	\$24,815,405	\$2,142,435	\$20,173,155	\$4,642,250				
Travel	-	-	-	-	12,928	-	-	12,928
Equipment*	-	-	-	-	-	-	-	-
Supplies	728,136	90,247	586,471	141,665	25,000	48	5,032	19,968
Contractual	2,090,268	208,351	2,585,339	(495,071)	15,948	-	10,188	5,761
Facilities / Construction								
Other:								
Food Cost	776,852	181,555	925,444	(148,592)				
Transportation	547,215	3,607	304,187	243,028				
Staff Mileage	100,000	11,638	117,843	(17,843)				
Field Trips, including Transportation	3,201	437	6,042	(2,841)				
Space	1,211,912	43,785	500,209	711,703				
Utilities / Telephone / Internet	843,052	66,892	841,677	1,375				
Publication/Advertising/Printing	54,991	516	626	54,365				
Repair/Maintenance Building	408,572	35,217	244,170	164,402				
Repair/Maintenance Equipment	8,654	45,248	79,958	(71,304)				
Property & Liability Insurance	72,108	17,503	183,779	(111,671)				
Parent Involvement / CWPC	49,000	3,497	25,040	23,960				
Other Costs*	240,460	-	154,428	86,032				
Staff & Parent Training	3,091	-	765	2,326	237,568	1,161	188,296	49,272
Total Direct Charges	\$31,952,917	\$2,850,928	\$26,729,131	\$5,223,786	291,444	1,210	203,516	87,928
Total Indirect Charges	\$3,106,182	\$257,672	\$2,405,622	\$700,560	\$32,383	\$108	\$18,316	\$14,067
Total Federal Expenditures	\$35,059,099	\$3,108,600	\$29,134,753	\$5,924,346	\$323,827	1,318	221,832	\$101,995
% of Annual Budget Expended to Date			83%				69%	
Non-Federal Share	\$7,011,820	\$503,681	\$4,772,799	\$2,239,021	\$64,765	\$329	\$55,458	\$9,307

*Other Costs Include:
FIRST AID (INCLUDES WORKERS COMP)

PROPERTY TAXES
REPAIR/MAINTENANCE-SPECIAL
DEPRECIATION EXPENSE
SUBSCRIPTION EXPENSE
POSTAGE/EXPRESS MAIL
DUES - ORGANIZATIONS
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
MEETING COSTS - INTERNAL
PROGRAM - MISCELLANEOUS
TRAINING OTHER
EMPLOYEE EVENT
RECOGNITION
SAFETY

Credit Card Expenses: Credit card statement dated 11/1/23-11/30/23			
November 2023 expenses:			
Program Supplies - Nutrition/Medically			
Prescribed	\$	170	Manor Drug Medical - Formula
CWPC- Other	\$	933	Dicicos - Dinner for CWPC Meeting
CWPC- Other	\$	91	Foodmaxx - Food & Drinks for CWPC Meeting
CWPC- Other	\$	910	Costco - Food & Drinks for CWPC Meeting
Program Supplies - Kitchen	\$	5,267	Walmart - Kitchen supplies for all centers
Parent Engagement - Supplies	\$	60	Dollar Tree - LPM Workshop Supplies
	\$	7,430	

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
November 30, 2023

Description	Early Head Start - Basic				Early Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining
Personnel	\$3,655,192	\$247,060	\$2,412,051	\$1,243,141	\$0	\$0	\$0	\$0
Fringe Benefits	1,608,284	65,703	673,085	935,199	-	\$0	\$0	-
Total Personnel	5,263,476	312,763	3,085,136	2,178,340	-	-	-	-
Travel	-	-	-	-	16,898	-	-	16,898
Equipment*	-	-	-	-	-	-	-	-
Supplies	242,877	12,764	195,729	47,148	33,488	11	1,095	32,393
Contractual	875,297	21,850	219,756	655,541	26,526	-	-	26,526
Facilities / Construction	-	-	-	-				
Other:								
Food Cost	50,000	7,522	29,299	20,701				
Transportation	9,536	707	8,976	560				
Staff Mileage	25,000	4,890	40,213	(15,213)				
Field Trips, including Transportation	1,730	-	-	1,730				
Space	84,678	7,674	61,672	23,006				
Utilities / Telephone / Internet	151,060	9,474	106,333	44,727				
Publication/Advertising/Printing	1,500	113	137	1,363				
Repair/Maintenance Building	230,781	3,419	23,876	206,905				
Repair/Maintenance Equipment	21,223	2,640	3,332	17,891				
Property & Liability Insurance	24,009	2,359	24,056	(47)				
Parent Involvement / CWPC	18,628	831	4,125	14,503				
Other Costs*	39,344	-	35,216	4,128				
Staff & Parent Training	2,277	-	95	2,182	96,459	235	43,345	53,114
Total Direct Charges	7,041,416	387,005	3,837,952	3,203,464	173,371	246	44,440	\$128,931
Total Indirect Charges	\$703,982	\$34,979	\$345,416	\$358,566	\$15,906	\$23	\$4,000	\$11,906
Total Federal Expenditures	\$7,745,398	421,984	\$4,183,368	\$3,562,030	\$189,277	269	\$48,440	\$140,837
% of Annual Budget Expended to Date			54%				26%	
Non-Federal Share	\$1,549,080	\$37,794	\$1,121,517	\$427,562	\$37,855	\$67	\$12,110	\$35,209

*Other Costs Include:
FIRST AID (INCLUDES WORKERS COMP)

PROPERTY TAXES
REPAIR/MAINTENANCE-SPECIAL
DEPRECIATION EXPENSE
SUBSCRIPTION EXPENSE
POSTAGE/EXPRESS MAIL
DUES - ORGANIZATIONS
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
MEETING COSTS - INTERNAL
PROGRAM - MISCELLANEOUS
TRAINING OTHER
EMPLOYEE EVENT
RECOGNITION
SAFETY

Credit Card Expenses: Credit card statement dated 11/1/23-11/30/23

November 2023 expenses:

CWPC- Other	\$	205	Dicicos - Dinner for CWPC Meeting
CWPC- Other	\$	20	Foodmaxx - Food & Drinks for CWPC Meeting
CWPC- Other	\$	200	Costco - Food & Drinks for CWPC Meeting
Program Supplies - Kitchen	\$	1,156	Walmart - Kitchen supplies for all centers
Program Supplies - Classroom	\$	477	Target - Infant Spoons, blankets, soap for classroom
Parent Engagement - Supplies	\$	15	Dollar Tree - LPM Workshop Supplies
	\$	2,073	

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
December 31, 2023

Description	Head Start - Basic				Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining
Personnel	\$17,232,920	\$1,435,559	\$16,404,315	\$828,605				
Fringe Benefits	7,582,485	618,320	5,822,720	1,759,765				
Total Personnel	\$24,815,405	\$2,053,879	\$22,227,034	\$2,588,371				
Travel	-	-	-	-	12,928	-	-	12,928
Equipment*	-	-	-	-	-	-	-	-
Supplies	728,136	115,915	702,386	25,750	25,000	-	5,032	19,968
Contractual	2,090,268	99,264	2,684,603	(594,335)	15,948	-	10,188	5,761
Facilities /Construction								
Other:								
Food Cost	776,852	(197,261)	728,183	48,669				
Transportation	547,215	58,280	362,466	184,749				
Staff Mileage	100,000	12,399	130,242	(30,242)				
Field Trips, including Transportation	3,201	-	6,042	(2,841)				
Space	1,211,912	43,705	543,913	667,999				
Utilities / Telephone / Internet	843,052	71,314	912,991	(69,939)				
Publication/Advertising/Printing	54,991	-	626	54,365				
Repair/Maintenance Building	408,572	15,837	260,007	148,565				
Repair/Maintenance Equipment	8,654	58,821	138,779	(130,125)				
Property & Liability Insurance	72,108	17,874	201,653	(129,545)				
Parent Involvement / CWPC	49,000	5,893	30,932	18,068				
Other Costs*	240,460	-	169,083	71,377				
Staff & Parent Training	3,091	-	765	2,326	237,568	4,986	193,282	44,286
Total Direct Charges	\$31,952,917	\$2,355,920	\$29,099,706	\$2,853,211	291,444	4,986	208,502	82,942
Total Indirect Charges	\$3,106,182	\$213,352	\$2,618,974	\$487,208	\$32,383	\$449	\$18,765	\$13,618
Total Federal Expenditures	\$35,059,099	\$2,569,272	\$31,718,680	\$3,340,419	\$323,827	5,435	227,267	\$96,560
% of Annual Budget Expended to Date			90%				70%	
Non-Federal Share	\$7,011,820	\$971,238	\$5,744,036	\$1,267,783	\$64,765	\$1,359	\$56,817	\$7,948

*Other Costs Include:

FIRST AID (INCLUDES WORKERS COMP)
PROPERTY TAXES
REPAIR/MAINTENANCE-SPECIAL
DEPRECIATION EXPENSE
SUBSCRIPTION EXPENSE
POSTAGE/EXPRESS MAIL
DUES - ORGANIZATIONS
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
MEETING COSTS - INTERNAL
PROGRAM - MISCELLANEOUS
TRAINING OTHER
EMPLOYEE EVENT
RECOGNITION
SAFETY

Credit Card Expenses: Credit card statement dated 12/1/23-12/31/23

December 2023 expenses:

Training Other	\$	652	Premier Food Safety - Food Handler Certification
Office Supplies	\$	299	Office Depot - Labels for Child Files
Program Supplies - Kitchen	\$	32,181	Cresco Resco - Kitchen supplies for all centers
Repairs & Maintenance - Equipment	\$	617	Restaurant Supply - Dishwasher repair - Jefferson HS
Program Supplies - Kitchen	\$	995	Refrigerator - Clovis HS
Program Supplies - Kitchen	\$	2,818	Microwave - Dakota Cir. HS Dishwasher, Refrigerator, Stove - Maple Vista HS
Supplies - Other	\$	238	Dollar Tree - Specialized pitchers for children with allergies/intolerances
Program Supplies - Disposables	\$	349	Target - Toiletries for children with disabilities
Staff Training	\$	932	American Air - Travel to NHSA Winter Leadership Institute
Staff Training	\$	1,673	Hilton - Hotel for NHSA Winter Leadership Institute
Telephone	\$	3,454	Frontier Communication - Telephone Service
Internet	\$	343	Frontier Communication - Internet Service
Parent Engagement - Supplies	\$	26	Dollar Tree - LPM Nutrition Workshop Supplies
	\$	44,576	

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
December 31, 2023

Description	Early Head Start - Basic				Early Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining
Personnel	\$3,655,192	\$256,776	\$2,668,828	\$986,364	\$0	\$0	\$0	\$0
Fringe Benefits	1,608,284	89,275	762,359	845,925	-	\$0	\$0	-
Total Personnel	5,263,476	346,051	3,431,187	1,832,289	-	-	-	-
Travel	-	-	-	-	16,898	-	-	16,898
Equipment*	-	-	-	-	-	-	-	-
Supplies	242,877	8,138	203,868	39,009	33,488	-	1,095	32,393
Contractual	875,297	8,614	228,370	646,927	26,526	-	-	26,526
Facilities /Construction	-	-	-	-				
Other:								
Food Cost	50,000	(11,711)	17,588	32,412				
Transportation	9,536	492	9,468	68				
Staff Mileage	25,000	3,448	43,661	(18,661)				
Field Trips, including Transportation	1,730	-	-	1,730				
Space	84,678	7,674	69,346	15,332				
Utilities / Telephone / Internet	151,060	13,236	119,569	31,491				
Publication/Advertising/Printing	1,500	-	137	1,363				
Repair/Maintenance Building	230,781	1,500	25,376	205,405				
Repair/Maintenance Equipment	21,223	12,518	15,851	5,372				
Property & Liability Insurance	24,009	2,359	26,415	(2,406)				
Parent Involvement / CWPC	18,628	425	4,549	14,079				
Other Costs*	39,344	-	37,721	1,623				
Staff & Parent Training	2,277	-	95	2,182	96,459	2,697	46,043	50,416
Total Direct Charges	7,041,416	392,745	4,233,202	2,808,214	173,371	2,697	47,138	\$126,233
Total Indirect Charges	\$703,982	\$35,572	\$380,988	\$322,994	\$15,906	\$242	\$4,242	\$11,664
Total Federal Expenditures	\$7,745,398	428,317	\$4,614,190	\$3,131,208	\$189,277	2,939	\$51,380	\$137,897
% of Annual Budget Expended to Date			60%				27%	
Non-Federal Share	\$1,549,080	\$680,634	\$1,802,152	-\$253,072	\$37,855	\$735	\$12,845	\$34,474

*Other Costs Include:
FIRST AID (INCLUDES WORKERS COMP)
PROPERTY TAXES
REPAIR/MAINTENANCE-SPECIAL
DEPRECIATION EXPENSE
SUBSCRIPTION EXPENSE
POSTAGE/EXPRESS MAIL
DUES - ORGANIZATIONS
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
MEETING COSTS - INTERNAL
PROGRAM - MISCELLANEOUS
TRAINING OTHER
EMPLOYEE EVENT
RECOGNITION
SAFETY

Credit Card Expenses: Credit card statement dated 12/1/23-12/31/23			
December 2023 expenses:			
Training Other	\$	143	Premier Food Safety - Food Handler Certification
Office Supplies	\$	66	Office Depot - Labels for Child Files
Program Supplies - Kitchen	\$	7,064	Cresco Resco - Kitchen supplies for all centers
Supplies - Other	\$	52	Dollar Tree - Specialized pitchers for children with allergies/intolerances
Staff Training	\$	650	American Air - Travel to NHSA Winter Leadership Institute
Staff Training	\$	1,085	Hilton - Hotel for NHSA Winter Leadership Institute
Parent Engagement - Supplies	\$	58	Dollar Tree - LPM Workshop Supplies
	\$	9,118	



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Finance
Consent Agenda Item #: 8IX	Director: Steve Warnes
Subject: Agency's Investment Report	Officer: Jay Zapata

Background

The information below is presented to keep the Committee apprised on the status of the Agency's investment accounts.

As of December 31, 2022, the Agency holds these investments to maintain cash funding items such as the health insurance reserve and accrued vacation liability.

	Wells Fargo
Cash & Cash Equivalents	1,487,644
Corporate Bonds	159,709
Government Bonds	600,034
Certificates of Deposit (CD)	1,368,918
Stocks	15,674
Total	\$ 3,631,979
Minus unrealized gains on CDs	(27,019)
General Ledger balance	\$ 3,658,998

Total annual interest expected from these fixed income investments is \$66,451 providing an average rate of 3.05%. Interest rates received on the Corporate Fixed Income investment is 4.45%; this holding will mature in 2026. The US Treasury Notes and Certificates of Deposit have interest rates between 2.00% and 4.85%; and a tiered maturity date structure to provide for both shorter-term maturities and longer investments past 2026.

The funds at Self-Help Federal Credit Union are returning 3.31% interest.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Finance
Consent Agenda Item #: 8X	Director: Steven Warnes
Subject: Health Insurance Report	Officer: Jay Zapata

Background

The information presented below is intended to keep the Committee apprised on the financial status of the Agency's self-funded health insurance plan.

As of December 31, 2023, the health insurance reserve is at \$7.0 million, which would cover approximately 9.4 months of average expenditures. Contributions from programs and employees for 2023 totaled \$10,492,156 while the Fund paid out \$8,969,677 in expenses.

Changes to the health insurance plan in 2022 through 2024 include:

- Effective January 2022: Tele-health service was added and 1% increase in Employer premiums and an average 8% increase to Employee premiums.
- Effective January 2023: Restructured the wellness program to include more employees; replaced wellness discounted premium by an incentive program available to all employees. 5.5% increase in Employer premiums.
- Effective January 2024: Kaiser HMO plan offered as an alternative to our existing PPO plan. Employer and Employee premiums will increase by 8%. Recordkeeper for FSA and HSA plans moved to Health Equity.

This table presents a sample of the monthly health insurance premium rates for 2023. Rates vary depending on the level of coverage tier selected. Rates for the PPO and HMO options are shown (a high-deductible option is available to the employees at a 40% lower cost).

	Agency	Employee	Total Premium
Employee Only	\$684	\$162	\$846
EE +Child(ren)	\$1,238	\$291	\$1,529
EE + Family	\$1,643	\$387	\$2,030
EE + Spouse	\$1,374	\$324	\$1,698

FRESNO EOC
HEALTH INSURANCE FUND REPORT
THROUGH DECEMBER 31, 2023

	2023												2022				
	January	February	March	April	May	June	July	August	September	October	November	December	YTD totals Jan-Dec	Mo. Avg. Prev 12 mos	YTD totals Jan-Dec	Annual Jan - Dec	Annual Mo. Avg Jan - Dec
Beginning Fund Balance	5,493,909	5,464,765	5,865,710	6,054,466	6,356,077	6,661,810	6,713,754	6,593,919	6,582,221	6,781,559	6,993,479	7,087,362					
Income																	
Agency Contributions	753,479	747,863	758,762	746,004	744,968	750,773	469,368	730,091	737,693	739,773	721,915	728,991	8,629,680	719,140	8,623,821	8,623,821	718,652
Additional Agency Contr.	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0	0	-
Employee Contributions	193,157	179,182	87,767	185,795	184,966	198,294	102,607	104,711	91,359	178,601	177,148	178,889	1,862,476	155,206	1,963,810	1,963,810	163,651
Total Income	946,636	927,045	846,529	931,799	929,934	949,067	571,975	834,802	829,052	918,374	899,063	907,880	10,492,156	874,346	10,587,631	10,587,631	882,303
Expenses																	
Health Claims Paid	597,281	252,921	277,335	258,071	304,953	538,213	322,956	467,555	230,864	364,574	412,434	620,444	4,647,601	387,300	5,188,655	5,188,655	432,388
Dental Claims Paid	47,952	37,885	42,028	52,612	38,170	43,411	47,309	40,230	51,508	40,476	40,252	45,187	527,020	43,918	525,612	525,612	43,801
Prescriptions Paid	161,856	93,451	158,339	153,394	111,262	144,243	148,592	175,789	169,927	131,072	179,436	150,681	1,778,042	148,170	1,764,880	1,764,880	147,073
Vision Claims Paid	6,778	2,036	14,828	1,220	8,412	9,115	6,472	6,625	11,450	7,469	931	4,300	79,636	6,636	68,611	68,611	5,718
Stop Loss Premiums	104,348	105,261	108,245	107,933	103,712	103,362	104,699	99,246	106,420	103,099	102,067	99,293	1,247,685	103,974	1,211,263	1,211,263	100,939
Stop Loss Claims	-	(22,123)	-	-	(67)	-	-	-	-	-	-	-	(22,190)	(1,849)	(440,948)	(440,948)	(36,746)
Life Insurance Premiums	8,250	8,188	8,240	9,187	9,203	9,170	8,969	9,043	9,028	8,984	8,963	8,462	105,687	8,807	149,754	149,754	12,480
Pinnacle	13,309	13,579	13,580	13,526	13,471	13,508	13,490	13,111	13,291	13,327	13,292	13,291	160,775	13,398	155,949	155,949	12,996
Blue Cross	13,835	13,895	13,994	13,975	13,875	13,955	13,954	13,558	13,696	13,716	13,697	13,677	165,827	13,819	163,337	163,337	13,611
Benefits Consultant	12,083	12,084	12,083	12,083	12,084	12,083	12,083	12,084	12,083	12,083	12,084	12,083	145,000	12,083	142,419	142,419	11,868
Employee Assist. Program	4,537	4,537	4,740	4,740	4,740	4,740	4,740	4,740	4,740	4,740	4,740	4,741	56,475	4,706	21,865	21,865	1,822
Preferred Chiropractors	871	875	881	880	874	879	878	854	863	864	862	861	10,442	870	10,645	10,645	887
TeleDoc	2,474	2,485	2,503	2,499	2,481	3,426	2,996	2,715	4,888	5,079	4,888	4,892	41,326	3,444	30,232	30,232	2,519
Other Expenses	2,206	1,026	977	68	1,031	1,018	982	950	956	971	11,534	942	22,661	1,888	22,588	22,588	1,882
ACA Fees	-	-	-	-	-	-	3,690	-	-	-	-	-	3,690	369	3,750	3,750	313
Total Expenses	975,780	526,100	657,773	630,188	624,201	897,123	691,810	846,500	629,714	706,454	805,180	978,854	8,969,677	747,535	9,018,612	9,018,612	751,551
Current Fund Activity (net)	(29,144)	400,945	188,756	301,612	305,733	51,944	(119,835)	(11,698)	199,338	211,920	93,883	(70,974)	1,522,479	126,812	1,569,019	1,569,019	130,752
Ending Fund Balance	5,464,765	5,865,710	6,054,466	6,356,077	6,661,810	6,713,754	6,593,919	6,582,221	6,781,559	6,993,479	7,087,362	7,016,388	7,016,388				
Enrollment																	
Employee only-Traditional	247	256	256	259	258	260	257	247	251	253	255	258		255		250	
High-Deduct	79	84	86	87	84	86	87	86	89	88	91	89		86		76	
Family coverage-Traditional	337	321	322	320	318	318	320	311	311	311	308	306		317		348	
High-Deduct	34	41	41	38	39	39	39	39	39	39	36	36		38		36	
Dental coverage only	42	54	49	47	49	47	46	45	48	49	48	49		48		40	
Temp/On Call Plan	-	-												0		0	
Total employees enrolled	739	756	754	751	748	750	749	728	738	740	738	738		744		750	
Average contributions per employee	1,281	1,226	1,123	1,241	1,243	1,265	764	1,147	1,123	1,241	1,218	1,230		1,175		1,176	
Average expenses per employee	1,320	696	872	839	834	1,196	924	1,163	853	955	1,091	1,326		1,005		1,002	

Estimated # months funded: 9.4



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Human Resources
Consent Agenda Item #: 8XI	Director: N/A
Subject: Employee Political & Advocacy Activities Policy	Officer: Nelson Dibie

Recommended Action

Executive Committee recommends review and approval of the Employee Political & Advocacy Activities Policy to be included in the Fresno EOC Employee Manual.

Background

On January 22, 2024 staff and the agency legal counsel, Kenneth Price, presented the Employee Political & Advocacy Activities Policy. Based on the feedback received from staff and Commissioners, the agency counsel, and employment counsel Paul Bauer revised the policy to be included in the agency's employee handbook.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board the policy will be added to the Fresno EOC Policy and Procedures Manual, and the Employee Handbook. If not approved by the Board, staff will take feedback to implement on proposal for future consideration.

PROPOSED FRESNO EOC EMPLOYMENT MANUAL POLICY

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PURPOSE: To provide employees with guidelines ~~regarding Electioneering for political and advocacy activities.~~

POLICY: It is the policy of Fresno EOC to encourage its employees to be civically engaged and involved in their community. These activities must be done within certain parameters. As a Community Action Agency, all employees must comply with ~~political activity~~ prohibitions ~~regarding Electioneering~~ applicable under the CSBG and Head Start Acts.

ELECTIONEERING: For the purposes of this policy, "Electioneer" or "Electioneering" is defined as any activity designed to persuade people to vote for a specific candidate for office, statewide or local ballot measure, or state or local legislation or ordinance. Such activity shall include attendance at political rallies, participating in a campaign committees, phone banking, doing campaign-related work, posting campaign signs, registering voters, or advocating for a contribution or vote.

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PROCEDURE:

Permissible Activities: The following are guidelines employees shall follow for common civil engagements and community activities they may participate in:

Voting: Acting in their personal capacities, employees may exercise their right to vote for or against any particular ballot measure or candidate. Employees may ~~of course~~ elect not to vote too. Employees should be guided by their own judgment and conscience in voting for or against ballot measures or candidates. Employees may vote for any candidate of their choice, including voting for or against a current incumbent. Employees may also vote against a ballot measure even if it is officially supported by Fresno EOC Board of Commissioners.

Contributions: Acting in their personal capacities, employees may contribute to political campaigns, whether in support of or opposition to ballot measures or candidates.

Endorsements: Employees may personally endorse candidates or ballot initiatives. They may not, however, make any express or implied statement suggesting that they represent Fresno EOC in that endorsement. Employees should affirmatively state when making an endorsement that it is made in their personal capacity and not on behalf of Fresno EOC. The Board of Commissioners as a body, however, may take action to endorse any initiative or legislation. However, no staff time, other than to investigate the initiative, may be used to support or promote the initiative or legislation. The Board of Commissioners as a body may not endorse any candidate.

Other Off-Duty ~~Advocacy-Electioneering~~ Activities: Acting in their off-duty, individual capacities, employees may engage in any lawful ~~political Electioneering~~ activities. ~~Lawful political activities include such things as attending a political rally, participating in a campaign committee, phone banking, doing campaign-related work, posting campaign signs, registering voters, or advocating for a contribution or vote for or against a candidate or ballot measure.~~

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12224

Fresno EOC hourly (non-exempt) employees are considered to be “off-duty” before the commencement of, or at the end of, any standard or overtime hours in their shift or that they are otherwise required to work. Salaried (exempt) employees who do not have a regular shift or hours are considered to be “off duty” before and after normal business hours, except when an employee is acting as a representative of Fresno EOC outside normal business hours. All employees are considered to be “off-duty” when they are on their approved meal period or rest breaks; on vacation, have taken an administrative day, or during a public holiday and documented with supervisor’s approval.

Impermissible Activities: The following are guidelines employees shall follow for common civil engagements and community they should not participate in:

Political-Electioneering Activities During Work Hours: Employees may not engage in ~~political-Electioneering~~ activities during work hours.

Political-Electioneering Activities on Fresno EOC Property: Employees may not engage in ~~political-Electioneering~~ activities on Fresno EOC property whether or not they are “off duty” as reflected in the employee's timesheets or the Fresno EOC calendar, as applicable.

Use Fresno EOC Funds or Resources to Advocate Electioneer: Employees may not use Fresno EOC funds or resources to advocate a partisan position or otherwise use Fresno EOC funds or resources to support personal ~~political-Electioneering~~ activities.

Solicitation of Campaign Contributions: Employees may not knowingly, directly or indirectly, ~~solicit any contribution or donation for a political campaign from any Fresno EOC commissioner, employee, or contractor.~~

Use Position to Influence: Employees may not use the authority or influence of their official positions to persuade or induce any Fresno EOC commissioner, employee, or contractor to ~~take Electioneer~~ or refrain from ~~taking any type of political action Electioneering~~.

Make Promises: Employees may not promise to provide any person with a gift, money, promotion, job, or other form of compensation in return for a contribution or vote.

Using Fresno EOC Resources for Personal Advocacy: ~~Employees may not advocate personal political positions by using Fresno EOC resources, including Fresno EOC email, phones, copiers, and other resources to advocate political positions such candidate, ballot measure, and legislative endorsements. Moreover, Fresno EOC employees shall not permit third parties to use Fresno EOC resources for electioneering.~~

Any Fresno EOC employee with any questions regarding permissible campaign activity or personal advocacy should contact their direct supervisor or the Chief Executive Officer.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Human Resources
Consent Agenda Item #: 8XII	Director: N/A
Subject: Human Resources Quarterly Summary Report	Officer: Nelson Dibie

Background

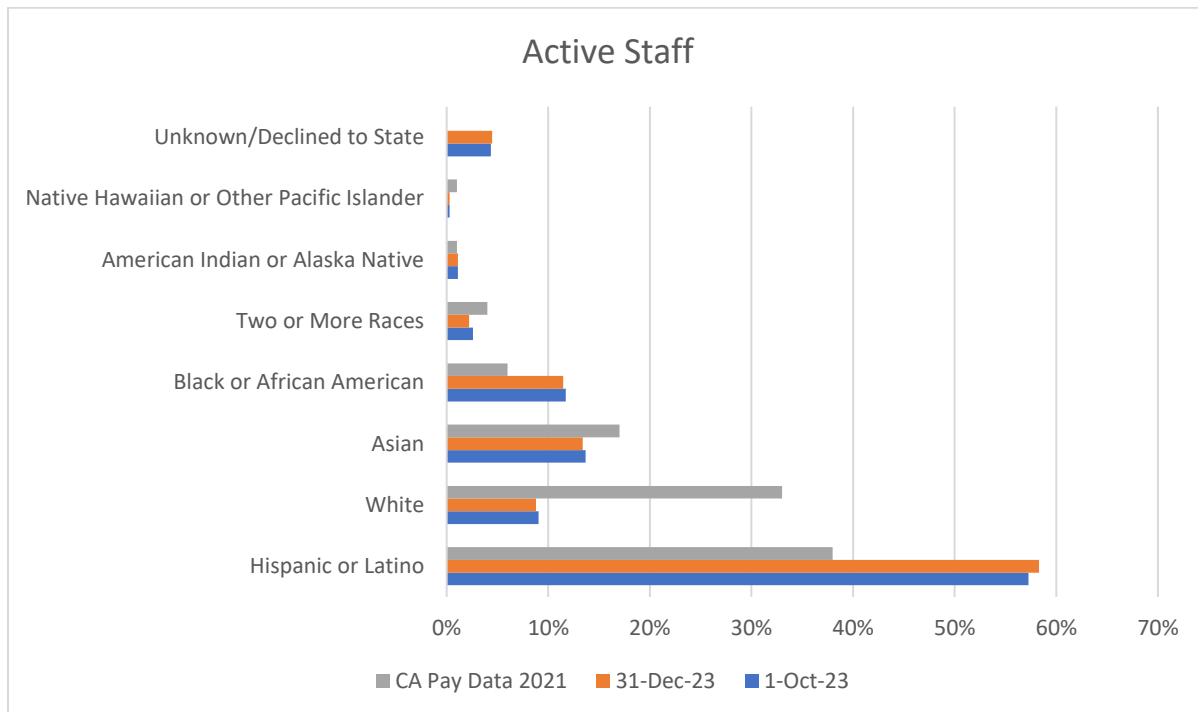
On a quarterly basis, staff provide the Committee with a high-level snapshot of Human Resources activity. The following information is provided in these reports:

- Employee Overview
 - Active Staff
 - Separations
 - Agency Demographics
- Talent Acquisition
 - New Hires
 - Promotions
 - Job Fairs
- Benefit Enrollment
 - Medical
 - Dental
- Safety & Worker's Compensation
 - Injuries
 - Near Misses
- Fiduciary Investment Review

Fresno EOC Demographics

As of October 1, 2023 through December 31, 2023

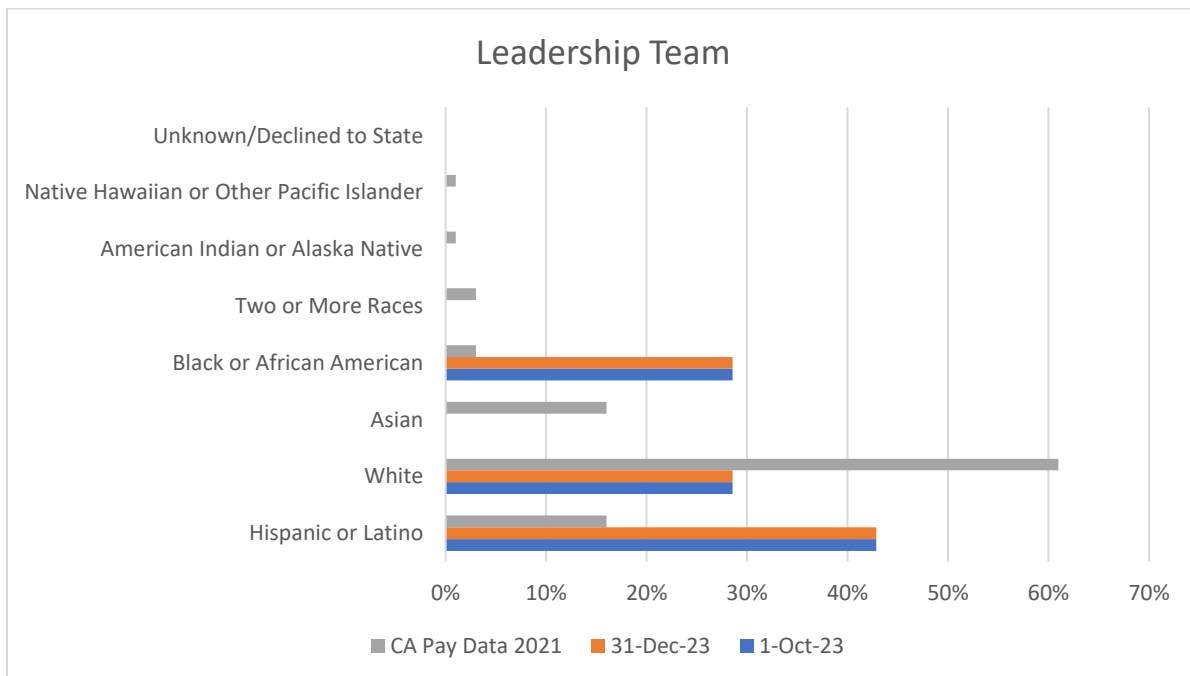
Fresno EOC Active Staff			
Ethnicity	1-Oct-23	31-Dec-23	CA Pay Data 2021
Hispanic or Latino	57%	58%	38%
White	9%	9%	33%
Asian	14%	13%	17%
Black or African American	12%	11%	6%
Two or More Races	3%	2%	4%
American Indian or Alaska Native	1%	1%	1%
Native Hawaiian or Other Pacific Islander	0.3%	0.3%	1%
Unknown/Declined to State	4%	4%	0%
Total	1083	1091	100%



Fresno EOC Leadership Team & Program Director Demographics

As of October 1, 2023 through December 31, 2023

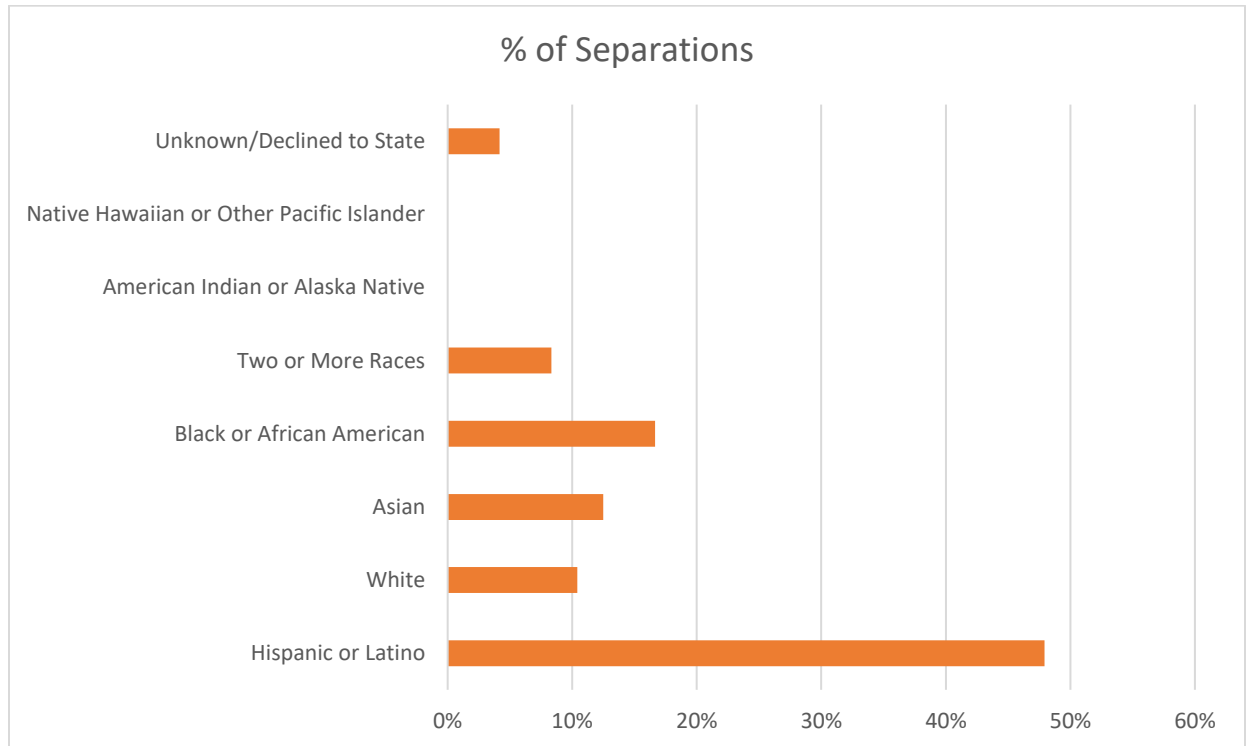
Leadership Team			
Ethnicity	1-Oct-23	31-Dec-23	CA Pay Data 2021
Hispanic or Latino	43%	43%	16%
White	29%	29%	61%
Asian	0%	0%	16%
Black or African American	29%	29%	3%
Two or More Races	0%	0%	3%
American Indian or Alaska Native	0%	0%	1%
Native Hawaiian or Other Pacific Islander	0%	0%	1%
Unknown/Declined to State	0%	0%	0%



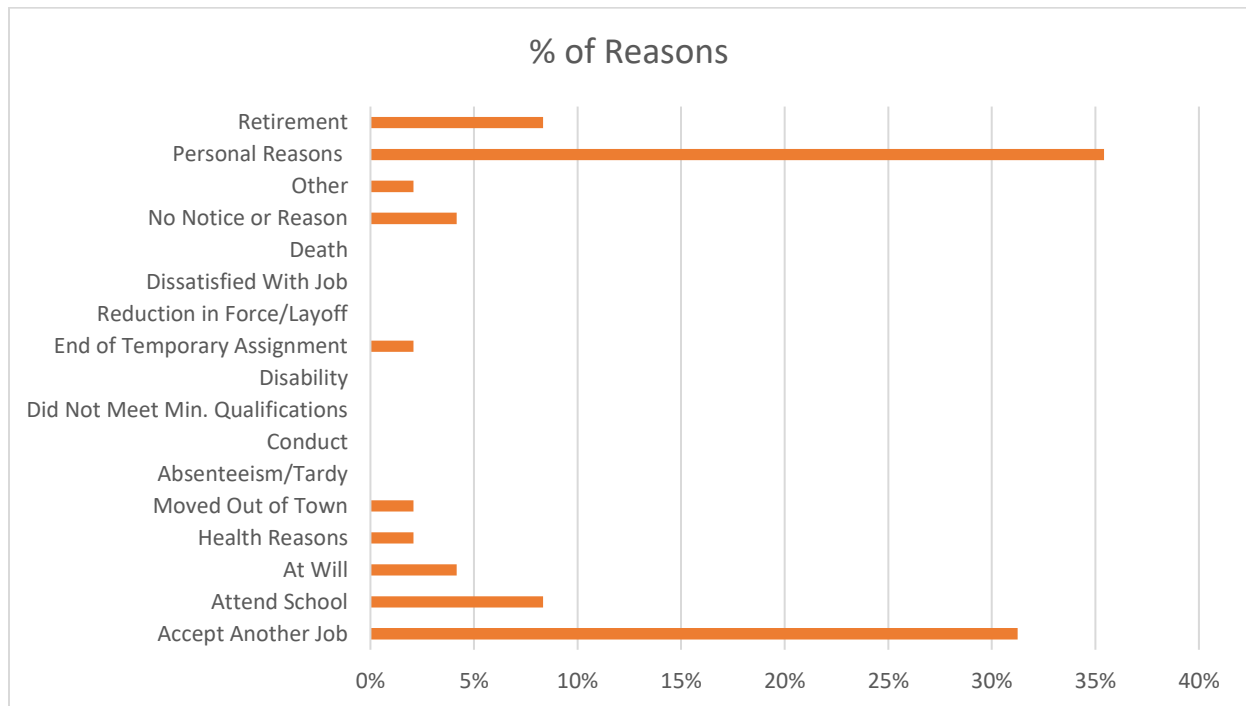
Fresno EOC Separations

As of October 1, 2023 through December 31, 2023

Fresno EOC Separations		
Ethnicity	# of Separations	% of Separations
Hispanic or Latino	23	48%
White	5	10%
Asian	6	13%
Black or African American	8	17%
Two or More Races	4	8%
American Indian or Alaska Native	0	0%
Native Hawaiian or Other Pacific Islander	0	0%
Unknown/Declined to State	2	4%
Total	48	100%



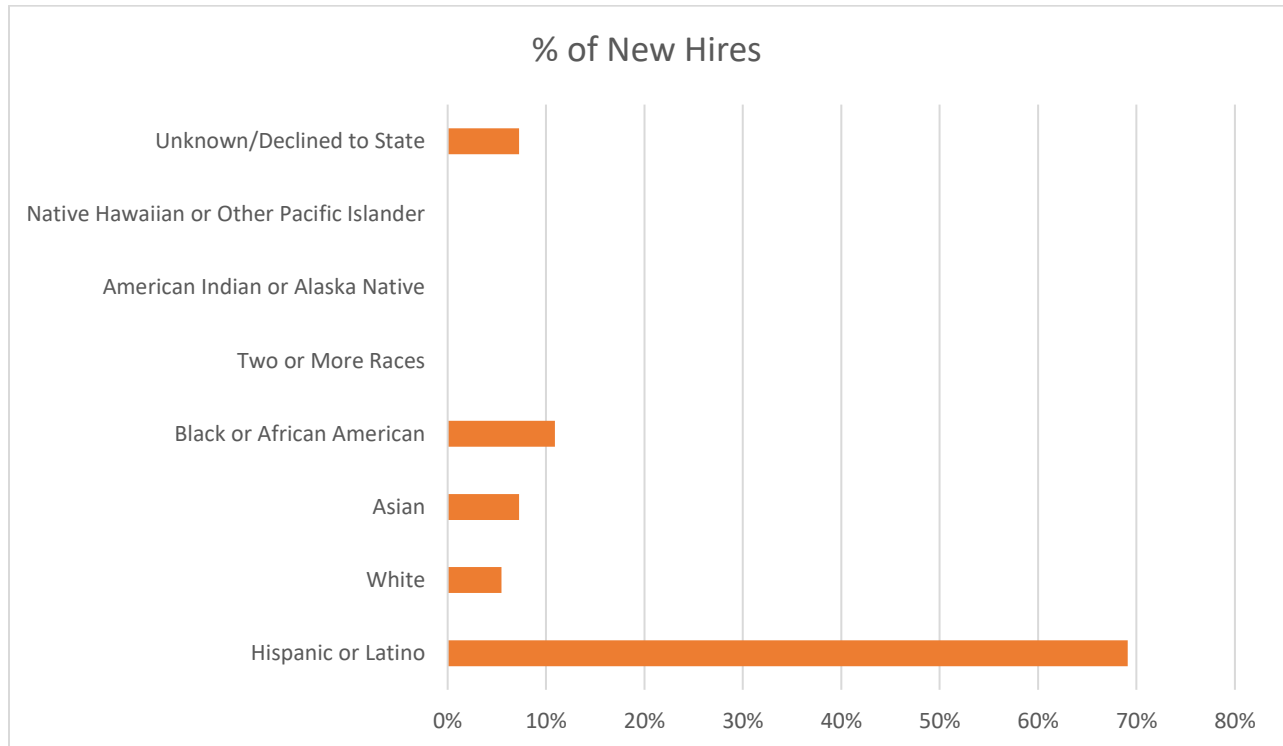
Fresno EOC Separation Reasons		
Reason	# of Reasons	% of Reasons
Accept Another Job	15	31%
Attend School	4	8%
At Will	2	4%
Health Reasons	1	2%
Moved Out of Town	1	2%
Absenteeism/Tardy	0	0%
Conduct	0	0%
Did Not Meet Min. Qualifications	0	0%
Disability	0	0%
End of Temporary Assignment	1	2%
Reduction in Force/Layoff	0	0%
Dissatisfied With Job	0	0%
Death	0	0%
No Notice or Reason	2	4%
Other	1	2%
Personal Reasons	17	35%
Retirement	4	8%
Total	48	100%



Fresno EOC New Hires

October 1, 2023 through December 31, 2023

Fresno EOC New Hires		
Ethnicity	# of New Hires	% of New Hires
Hispanic or Latino	38	69%
White	3	5%
Asian	4	7%
Black or African American	6	11%
Two or More Races	0	0%
American Indian or Alaska Native	0	0%
Native Hawaiian or Other Pacific Islander	0	0%
Unknown/Declined to State	4	7%
Total	55	100%



Time to Hire/Time to Fill Report
2023 - Quarter 4

VACANCY	PROGRAM/ DEPARTMENT	APPLICANT TYPE	GENDER	ETHNICITY	REQUISITION DATE	APPLICATION RECEIVED	DATE OF HIRE	TIME TO HIRE	TIME TO FILL
Business Account Specialist	Employment and Training	Internal Hire	Male	Hispanic or Latino	07/06/2023	07/07/2023	10/2/2023	87	88
Business Analyst	Finance	New Hire	Woman / Female	Hispanic or Latino	06/09/2023	06/14/2023	10/02/2023	110	115
Energy Services Navigator	Navigation Center	Internal Hire	Female	Hispanic or Latino	08/07/2023	08/14/2023	10/9/2023	56	63
Food Production Worker I	Food Services	New Hire	Man / Male	Not Hispanic or Latino	09/08/2023	09/12/2023	10/09/2023	27	31
Client Services Representative	Energy Services	New Hire	Woman / Female	Hispanic or Latino	04/26/2023	05/01/2023	10/10/2023	162	167
Energy Services Navigator	Navigation Center	New Hire	Woman / Female	Not Hispanic or Latino	08/07/2023	08/08/2023	10/10/2023	63	64
Family/Community Services Specialist	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	07/14/2023	10/10/2023	88	92
Inclusion Assistant	Head Start 0-5	New Hire	Woman / Female	Not Hispanic or Latino	06/03/2023	08/06/2023	10/10/2023	65	129
Inclusion Assistant	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	06/03/2023	08/01/2023	10/10/2023	70	129
Supervisor - Public Lands Conservation & Trail	Local Conservation Corps	New Hire	Man / Male	Not Hispanic or Latino	09/05/2023	09/13/2023	10/10/2023	27	35
Teacher Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	04/14/2023	06/20/2023	10/10/2023	112	179
Teacher I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	07/21/2023	10/10/2023	81	92
Teacher/Caregiver I	Head Start 0-5	New Hire	Woman / Female	Not Hispanic or Latino	07/10/2023	08/12/2023	10/10/2023	59	92
Recruitment and Outreach Assistant	Local Conservation Corps	New Hire	Woman / Female	Hispanic or Latino	08/04/2023	08/08/2023	10/16/2023	69	73
Food Production Worker I	Food Services	New Hire	Woman / Female	Hispanic or Latino	08/29/2023	10/03/2023	10/23/2023	20	55
Food Production Worker I	Food Services	New Hire	Woman / Female	Hispanic or Latino	08/29/2023	10/02/2023	10/23/2023	21	55
Food Production Worker I	Food Services	New Hire	Man / Male	Not Hispanic or Latino	08/29/2023	09/29/2023	10/23/2023	24	55
Food Production Worker I	Food Services	New Hire	Man / Male	Not Hispanic or Latino	08/29/2023	09/28/2023	10/23/2023	25	55
Program Coordinator	Advance Peace	New Hire	Female	Not Hispanic or Latino	10/02/2023	10/03/2023	10/23/2023	20	21
Teacher Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	07/19/2023	10/23/2023	96	105
Teacher/Caregiver I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	08/11/2023	10/23/2023	73	105
Training Facilitator	Valley Apprenticeship Connection	New Hire	Man / Male	Hispanic or Latino	09/29/2023	09/29/2023	10/23/2023	24	24
Quality Control Inspector	Energy Services	Internal Hire	Male	Not Hispanic or Latino	10/24/2023	10/27/2023	10/30/2023	3	6
Accountant I	Finance	New Hire	Woman / Female	Hispanic or Latino	09/18/2023	09/25/2023	11/06/2023	42	49
Accountant I	Finance	New Hire	Man / Male	Not Hispanic or Latino	09/18/2023	09/20/2023	11/06/2023	47	49
Facilitator/Health Educator	Health Services	New Hire	Woman / Female	Hispanic or Latino	08/21/2023	08/31/2023	11/06/2023	67	77
Family Support Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/19/2023	11/06/2023	48	60
Family Support Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/18/2023	11/06/2023	49	60
Family Support Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/12/2023	11/06/2023	55	60
Family Support Assistant I	Head Start 0-5	New Hire	Man / Male	Hispanic or Latino	04/13/2023	05/12/2023	11/06/2023	178	207
Food Production Worker I	Food Services	New Hire	Woman / Female	Not Specified	08/29/2023	10/02/2023	11/06/2023	35	69
FP Worker II	Food Services	New Hire	Man / Male	Hispanic or Latino	08/29/2023	10/13/2023	11/06/2023	24	69
Teacher Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	09/27/2023	11/06/2023	40	119
Training Facilitator	Advance Peace	Internal Hire	Female	Hispanic or Latino	11/03/2023	11/03/2023	11/13/2023	10	10
Breastfeeding Peer Counselor	Women, Infants and Children	New Hire	Woman / Female	Hispanic or Latino	10/18/2023	10/26/2023	11/20/2023	25	33
Family Support Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/18/2023	11/20/2023	63	74
Neighborhood Change Agent	Advance Peace	New Hire	Not Specified	Not Specified	11/08/2023	11/13/2023	11/20/2023	7	12
Neighborhood Change Agent	Advance Peace	New Hire	Man / Male	Not Hispanic or Latino	11/08/2023	11/13/2023	11/20/2023	7	12
Neighborhood Change Agent	Advance Peace	New Hire	Man / Male	Hispanic or Latino	11/08/2023	11/09/2023	11/20/2023	11	12
Nutrition Clerk	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/21/2023	11/20/2023	60	74
Peacekeeper	Advance Peace	New Hire	Man / Male	Not Hispanic or Latino	11/08/2023	11/09/2023	11/20/2023	11	12
Receptionist/Tutor	SOUL	New Hire	Woman / Female	Hispanic or Latino	10/20/2023	10/24/2023	11/20/2023	27	31
Teacher/Caregiver Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	08/24/2023	11/20/2023	88	133
Teacher/Caregiver I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	08/21/2023	11/20/2023	91	133
Family Support Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	09/07/2023	09/16/2023	12/04/2023	79	88
Para-Transit Driver	Transit	New Hire	Woman / Female	Not Hispanic or Latino	11/02/2023	11/27/2023	12/04/2023	7	32
Quality Assurance Analyst	Executive Office	Promotion	Woman / Female	Not Hispanic or Latino	10/02/2023	10/05/2023	12/4/2023	60	63
Teacher Assistant I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	08/18/2023	12/04/2023	108	147
Teacher/Caregiver Assistant I	Head Start 0-5	New Hire	Woman / Female	Not Specified	10/02/2023	10/12/2023	12/04/2023	53	63
Teacher/Caregiver I	Head Start 0-5	New Hire	Woman / Female	Hispanic or Latino	07/10/2023	09/27/2023	12/04/2023	68	147
Employee Relations Manager	Human Resources	New Hire	Woman / Female	Hispanic or Latino	08/29/2023	10/30/2023	12/18/2023	49	111
Facilities Director	Facilities	New Hire	Man / Male	Hispanic or Latino	09/12/2023	09/24/2023	12/18/2023	85	97
Food Distribution Assistant	Food Services	New Hire	Woman / Female	Hispanic or Latino	11/27/2023	12/01/2023	12/18/2023	17	21
Lead WIC Nutrition Assistant	Women, Infants and Children	Promotion	Female	Not Hispanic or Latino	10/19/2023	10/27/2023	12/18/2023	52	60
Lead WIC Nutrition Assistant	Women, Infants and Children	Promotion	Female	Hispanic or Latino	10/19/2023	10/27/2023	12/18/2023	52	60
Program Assistant	Access to Technology	New Hire	Man / Male	Hispanic or Latino	11/03/2023	11/04/2023	12/18/2023	44	45
Program Coordinator	Access to Technology	New Hire	Man / Male	Hispanic or Latino	11/03/2023	11/21/2023	12/18/2023	27	45
Teacher (preliminary or clear credential)	SOUL	New Hire	Man / Male	Not Specified	10/04/2023	11/16/2023	12/18/2023	32	75
Teacher (preliminary or clear credential)	SOUL	New Hire	Man / Male	Not Hispanic or Latino	10/04/2023	11/13/2023	12/18/2023	35	75

Time to Hire/Time to Fill Report
2023 - Quarter 4

Technology Liaison	Access to Technology	New Hire	Prefer not to say	Not Specified	11/03/2023	11/08/2023	12/18/2023	40	45
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Q4 Average Days to Hire: 52.9
Q4 Average Days to Fill: 72.7

Hires January 1 - December 31, 2023: 282
Terms from 2023: 57

Hires October 1 - December 31, 2023: 51
Terms from Quarter 4 hires: 2

Promotions
2023 - Quarter 4

Position Start Date	Job Title Description	Program/Department
10/09/2023	Nutrition Assistant (CLC)	Women, Infants & Children
10/23/2023	Teacher II	Head Start
10/23/2023	Teacher II	Head Start
10/23/2023	Program Coordinator	Advance Peace
10/25/2023	Assessor	Energy Services
10/30/2023	Quality Control Inspector	Energy Services
12/04/2023	Family Engagement/Volunteer Services Coordinator	Head Start
12/04/2023	Quality Assurance Analyst	Executive Office
12/04/2023	Family/Community Services Specialist	Head Start
12/18/2023	Lead WIC Nutrition Assistant	Women, Infants & Children
12/18/2023	Lead WIC Nutrition Assistant	Women, Infants & Children

Total Promotions: 11
Internal Promotions 2
Recruitment Process: 9

Promotions
2023 - Quarter 4

Ethnicity	Race Description	Internal/ Recruitment
Not Hispanic or Latino	Asian	Recruitment
Hispanic or Latino	Not Specified	Internal
Hispanic or Latino	Not Specified	Internal
Not Hispanic or Latino	Black or African American	Recruitment
Hispanic or Latino	Not Specified	Recruitment
Not Hispanic or Latino	Asian	Recruitment
Hispanic or Latino	Not Specified	Recruitment
Not Hispanic or Latino	Black or African American	Recruitment
Not Hispanic or Latino	Black or African American	Recruitment
Hispanic or Latino	Not Specified	Recruitment
Not Hispanic or Latino	White	Recruitment

Job/Resource Fairs Attended
2023 - Quarter 4

Date	Event	Organization
10/3/2023	Job Fair & Resource Fair	City of Sanger
10/4/2023	Fall Job Fair	Fresno City College
10/24/2023	Career Day & Graduation	The Fresno Center
11/18/2023	Career Day - For Parent	Head Start 0 to 5

Total Job Fairs Attended: 4

Job/Resource Fairs Attended
2023 - Quarter 4

Date	Event	Organization
10/3/2023	Job Fair & Resource Fair	City of Sanger
10/4/2023	Fall Job Fair	Fresno City College
10/24/2023	Career Day & Graduation	The Fresno Center
11/18/2023	Career Day - For Parent	Head Start 0 to 5

Total Job Fairs Attended: 4

Benefit Enrollments (Year 2023)

BUSINESS UNIT

All

Year

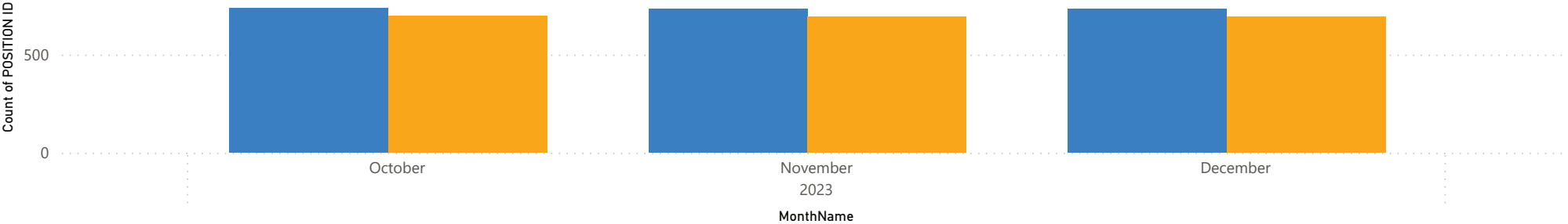
2023

MonthNubmer

Multiple selections

Medical and Dental Enrollments

PLAN TYPE Dental Medical



Monthly Medical Enrollments

Year	MonthNubmer	YearMonth	PLAN TYPE	Enrollments
2023	10	2023-10	Medical	696
2023	11	2023-11	Medical	693
2023	12	2023-12	Medical	692

Monthly Dental Enrollments

Year	MonthNubmer	YearMonth	PLAN TYPE	Enrollments
2023	10	2023-10	Dental	736
2023	11	2023-11	Dental	734
2023	12	2023-12	Dental	732

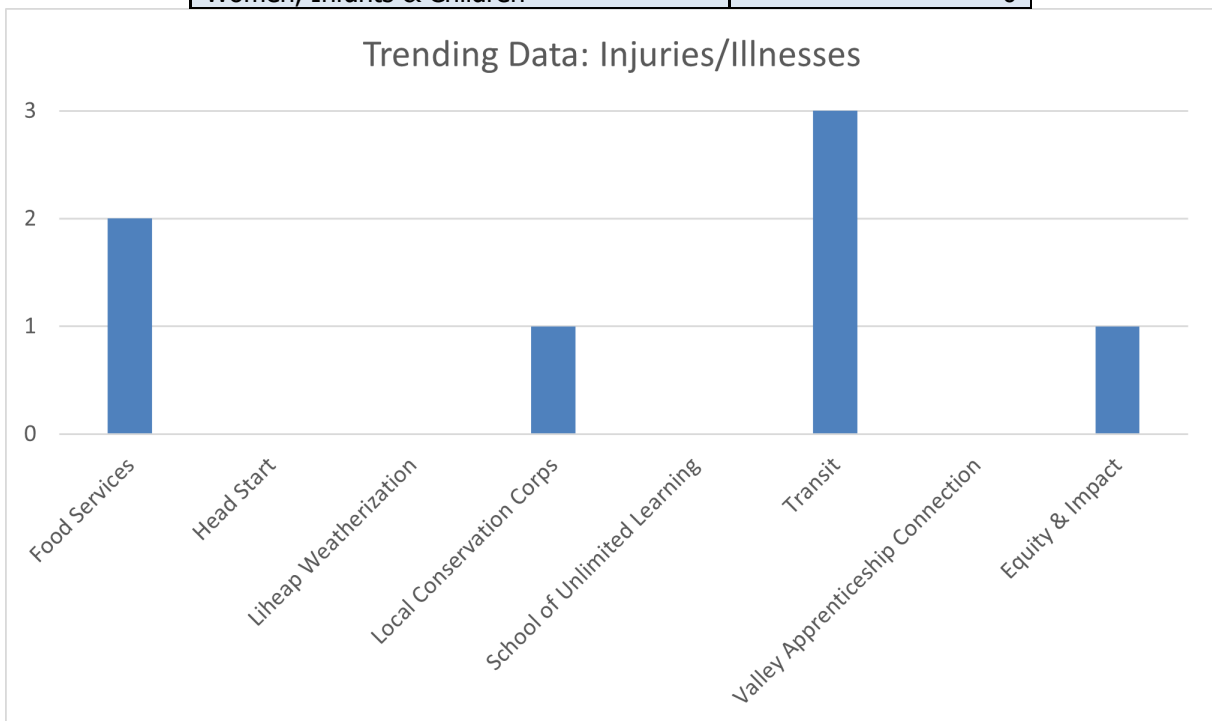
Fresno Economic Opportunities Commission

Workers Compensation Analysis

2023 4th Quarter Report

Trending Data: By Program

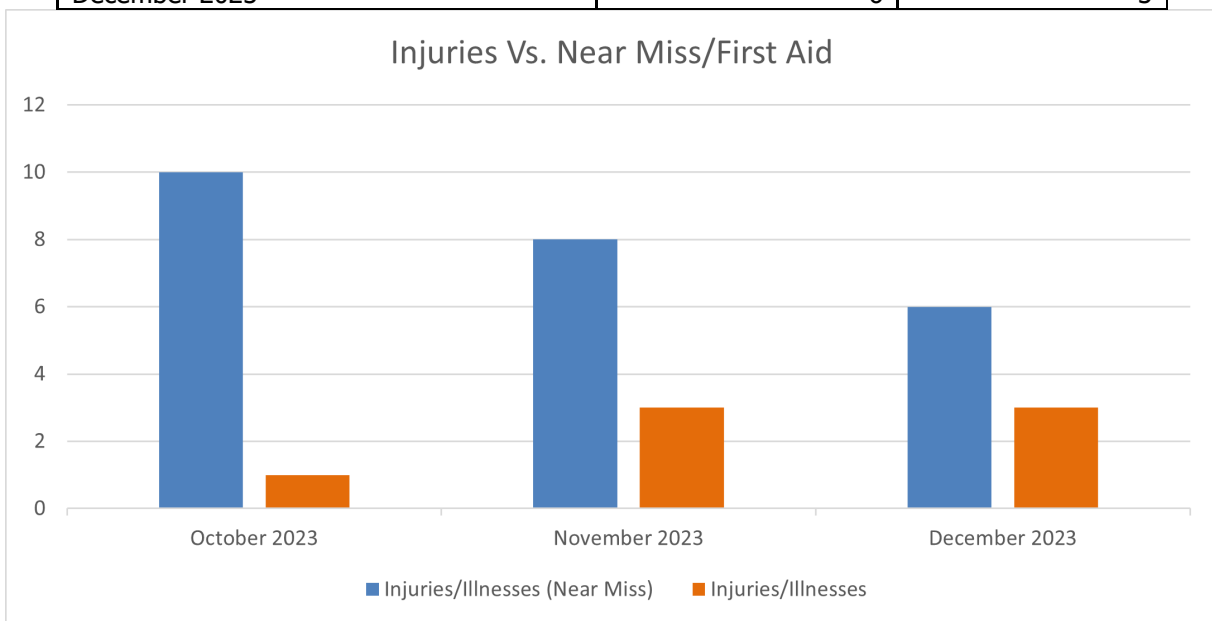
Departments	Injuries/Illnesses
Finance	0
AFLP	0
Early Head Start	0
Employment & Training	0
Energy Services	0
Equity & Impact	1
Executive Office	0
Food Services	2
Head Start	0
Health Services	0
Local Conservation Corps	1
Sanctuary and Support Services	0
School of Unlimited Learning	0
Transit	3
Valley Apprenticeship Connection	0
Women, Infants & Children	0



7 total of injuries/illnesses were reported. Transit with 3 injuries and Food services with 2.

Injuries by Month Vs. Near Miss

Month	Injuries/Illnesses (Near Miss)	Incidents: Injuries/Illnesses
October 2023	10	1
November 2023	8	3
December 2023	6	3



75% of work-related incidents at Fresno EOC did not result in a claim filed.

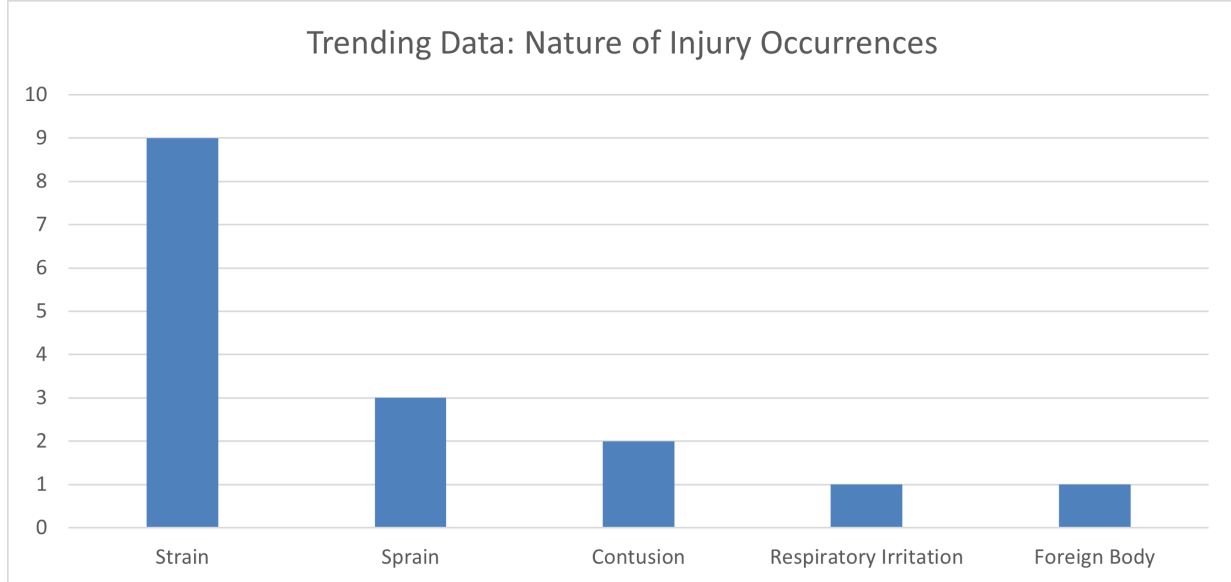
Near miss: Incident that did not result in a reportable claim, injury, illness, or damage but had the potential to do so.

Nature of Injury

Trending Data: Nature of Injury

Injury Nature	Occurrences
Strain	9
Contusion	2
Sprain	3
Pain	0
Inflammation	0
Trauma	0
Foreign Body	1
Laceration	0
Damage	0
Rash	0
Cut/Puncture/Laceration	0
Fracture	0
Stress	0
Respiratory Irritation	1

Trending Data: Nature of Injury Occurrences

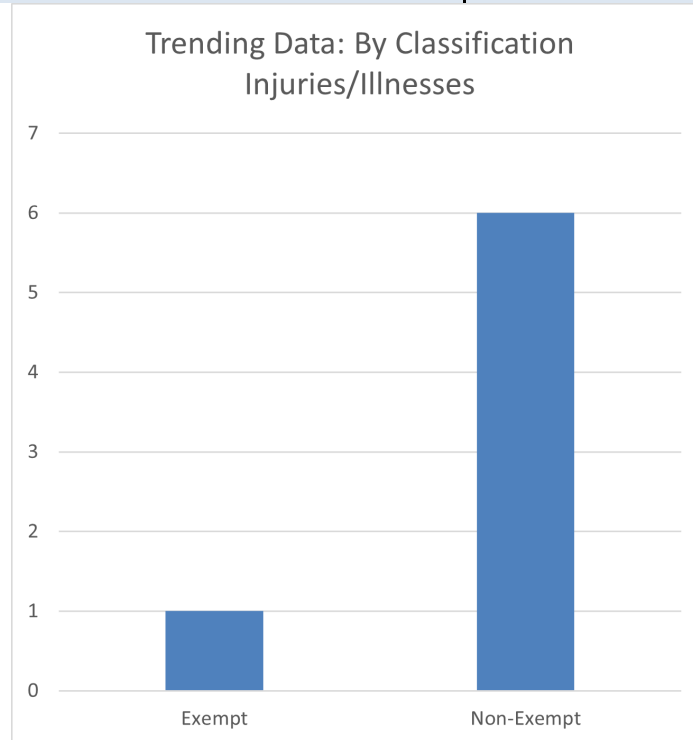


Most injury occurrences are a direct result of a strain, while contusion claims filed continue to remain low.

Claims Based on Employee Job Classification

Trending Data: By Classification

Classifications	Injuries/Illnesses
No classification assigned	0
Exempt	1
Non-Exempt	6
Other	0



Out of 7 injury/illnesses reported, 85% of workers compensation claims were filed by non-exempt employees



Fiduciary Investment Review™

Prepared for:

Fresno County Economic Opportunities
Commission
February 5, 2024

Prepared by:



CONFIDENTIAL

Fiduciary Investment Review™



Prepared for:

Fresno County Economic Opportunities Commission
February 5, 2024

Prepared by:



Presented by:

Lloyd Engleman
Managing Director

Accelerate Retirement- Lloyd Engleman

4160 Temescal Canyon Rd., Ste. 214
Corona, CA 92883

CONFIDENTIAL

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Q3 2023 Meeting Minutes

Fresno County Economic Opportunities Commission Fresno County Economic Opportunities Commission Retirement Plan

Meeting Date: 11/29/2023

Attendees

Committee Members	Erica Reyes	Fred Hamsayeh
	Jay Zapata (Absent)	Nelson Dibie
	Steve Warnes	
Accelerate Retirement- Lloyd Engleman	Lloyd Engleman	Angel Rodas Pablo

Administrative Review

Reviewed Prior Meeting Notes <input checked="" type="checkbox"/>
Reviewed Service Plan <input checked="" type="checkbox"/>
Signed IPS on file <input checked="" type="checkbox"/>
Signed Committee Charter on file <input checked="" type="checkbox"/>

Investment Due Diligence

Investment Analysis Summary

- Accelerate Retirement- Lloyd Engleman provided an economic and market commentary for Q3 2023.
- Accelerate Retirement- Lloyd Engleman reviewed the investment scoring methodology and criteria for monitoring, watchlisting and removing investments from the fund menu.
- Accelerate Retirement- Lloyd Engleman reviewed plan asset balances across all investment options.
 - Assets of the Plan as of 09/30/23 were \$32,970,780.94
 - 88.81% in Asset Allocation
 - 1.63% in Cash Alternatives
 - 1.78% in Fixed Income
 - 2.87% in International/Global Equity
 - 4.91% in U.S. Equity
- Accelerate Retirement- Lloyd Engleman reviewed the Plan's investment scorecard covering available funds as well as their current scores and performance metrics, scoring history, asset class coverage, as well as other key metrics.
 - All funds were reviewed from a quantitative and qualitative perspective.
 - 24 funds are acceptable:
 - Vanguard LifeStrategy Risk-Based Series Inv (7)
 - T. Rowe Price Personal Risk-Based Series (7)

Q3 2023

Meeting Minutes

- PIMCO RealPath Blend Target Date Series Instl (9)
- Calvert US Large Cap Core Rspnb Idx I, CISIX (7)
- Calvert Small-Cap I, CSVIX (7)
- Eaton Vance High Income Opportunities I, EIHIX (10)
- Fidelity Total Bond Fund, FTBFX (10)
- JPMorgan Mid Cap Growth R6, JMGMX (10)
- PIMCO International Bond (USD-Hdg) Instl, PFORX (9)
- Impax Global Environmental Markets Instl, PGINX (8)
- PIMCO Income Instl, PIMIX (9)
- TRP Integrated US Small-Cap Gr Eq, PRDSX (9)
- American Funds American Balanced R6, RLBGX (9)
- American Funds New Perspective R6, RNPGX (10)
- American Funds New World R6, RNWGX (9)
- Vanguard Equity-Income Adm, VEIRX (9)
- Vanguard 500 Index Admiral, VFIAX (10)
- Vanguard Growth Index Admiral, VIGAX (10)
- Vanguard Mid-Cap Value Index Admiral, VMVAX (9)
- Vanguard Small Cap Value Index Admiral, VSIAX (8)
- Vanguard Total Intl Stock Index Admiral, VTIAIX (10)
- State Street Instl US Govt MMkt Premier, GVMXX
- iShares Russell Small/Mid-Cap Idx K, BSMKX (10)
- The Standard Stable Asset Fund II, SSAFII.Stan
- 2 funds are on watchlist:
 - American Beacon International Eq R5, AAIEX (6)
 - PIMCO StocksPLUS Small Institutional, PSCSX (5)
- Potential Replacements:
 - Goldman Sachs Intl Sm Cp Insights Instl, GICIX (8)

Market Summary - Q3 2023

Equity and Fixed Income markets were both negative for the quarter, as long-term rates rose to levels not seen in over 15 years (as measured by the 10 Yr. Treasury). The rise in rates over the quarter negatively impacted the fixed income market, which was down 3.2%, bringing year-to-date returns negative, down 1.2% (Bloomberg Barclays Aggregate). International equities continued to underperform their U.S. equity counterparts. Small Cap Value was the best performing U.S. equity asset class, down 3.0% (Russell 2000 Value), outperforming Small Cap Growth which was the worst, down 7.3% (Russell 2000 Growth). Unemployment increased to 3.8% over the quarter, but the U.S. labor market continued to remain tight overall. The Federal Reserve raised rates 25 basis points over the quarter, indicating that rates would likely be higher for longer given the current inflationary outlook. (All data from MPI) ACR# 6019215 10/23

Q3 2023 Meeting Minutes

Scorecard Methodology

The Scorecard Methodology supports upholding the impartial conduct standards as the scores and analytics do not include any adviser compensation components and are calculated incorporating all investment fees and revenue sharing. Any and all compensation earned by the adviser (if any) is explicitly disclosed and reasonable given services provided. All information to any investment consideration has been disclosed and no misleading information has been provided to fiduciaries in their determination of action.

Fund Review

International Large Cap Value

American Beacon International Eq R5 (AAIEX) (Recent Scores: 6,9,9,6) is on the watchlist

Asset Value: \$136,785.22

Small Cap Blend

PIMCO StocksPLUS Small Institutional (PSCSX) (Recent Scores: 5,5,5,7) is on the watchlist

Asset Value: \$29,893.03

International Small-Mid Cap Blend

Eliminate Goldman Sachs Intl Sm Cp Insights Instl (GICIX) (Recent Scores: 8,5,5,5)

Map to Vanguard FTSE All-Wld ex-US SmCp Idx Adm (VFSAX) (Recent Scores: 10,10,9,8)

Asset Value: \$17,321.91

This fund change was completed on 11/7/2023 from the Q3 2023 Investment Committee Meeting.

Fiduciary Governance

Fiduciary Governance Summary

Reviewed Fiduciary Education Module/s ☒

Modules Reviewed: Module 8: Maintaining Your Fiduciary File

Education Modules

- Module 8: Maintaining Your Fiduciary File - This module covered maintaining a fiduciary file, a topic not clearly defined by ERISA. Questions like what issues should be documented, maintained, and for how long, were addressed. It was discussed that although this is often thought of as an administrative process, it is in fact a required fiduciary activity that, once clarified, is relatively simple to comply with.

Demographics

- Walt Waldin with Transamerica reviewed the Executive summary for all plans with Committee.

Q3 2023 Meeting Minutes

- Please see report in the Fiduciary Briefcase.

Plan Fees

Plan Fees Summary

- Fee Summary
 - Weighted average fund expense – 0.25%
 - Total annual recordkeeping and administration expense – 0.46%
 - Average recordkeeping and administration expense per participant – 0.00%
 - Total advisory fee – 0.19%
- Fee reduction from .27% to .24% will take effect on Dec 1st 2023 recordkeeping fee.

Pending Action Items

Scheduler <input checked="" type="checkbox"/>	Board Meeting Dec 4th at 5:00 P.M.
Employee Education <input checked="" type="checkbox"/>	Education for selected locations for Fresno EOC Ryan Louie and Fred Hamsayeh Dec 4th-Dec 6th
Fund Changes By Firm <input checked="" type="checkbox"/>	No fund changes for this quarter. Two funds on Watchlist: SCB PIMCO Stocks PLUS Small Institutional Scoring 5 of 10 ILCV American Beacon International Eq R5 Scoring 6-10 for the Third quarter.

Disclosures

This material contains an assessment of the market and economic environment at a specific point in time and is not intended to be a forecast of future events, or a guarantee of future results. Forward-looking statements are subject to certain risks and uncertainties. Actual results, performance, or achievements may differ materially from those expressed or implied. Information is based on data gathered from what we believe are reliable sources.

It is not guaranteed as to accuracy, does not purport to be complete and is not intended to be used as a primary basis for investment decisions. It should also not be construed as advice meeting the particular investment needs of any investor. The indices mentioned are unmanaged and cannot be directly invested into. Past performance does not guarantee future results.

ACR# 6020444 10/23

FRESNO COUNTY ECONOMIC OPPORTUNITIES COMMISSION

12/31/2023 Quarterly Plan Review
403(b), 401(a), 457(b) Plans



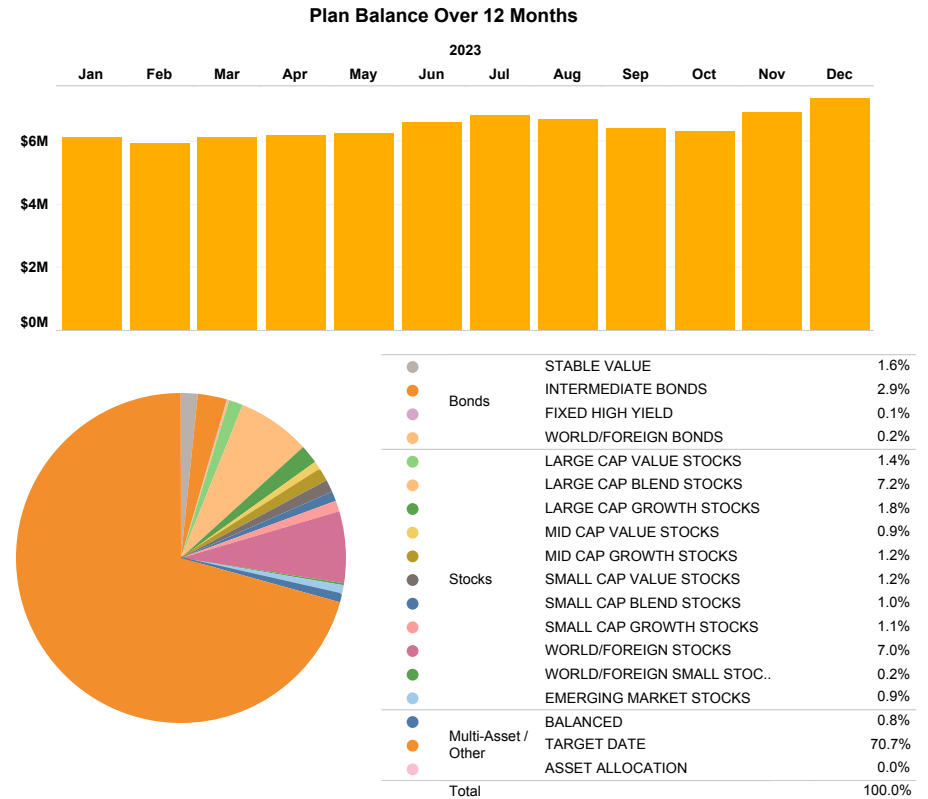
403(B) PLAN DATA



EXECUTIVE SUMMARY

FRESNO COUNTY ECONOMIC OPPORTUNITIES COMMISSION D/B/A FRESNO ECONOMIC

	2023 Q3	2023 Q4	Change
Assets	\$6,439,710	\$7,396,487	+\$956,777
Participants with a Balance	372	392	+20
Participation Rate	24.2%	24.1%	-0.1
Average Deferral Rate (%)	7.2%	7.3%	+0.1
Average Deferral Rate (\$)	\$141	\$135	-\$6
Average Participant Balance	\$17,311	\$18,869	+\$1,558
Average Number of Investments	3.9	3.8	-0.1
Total Distribution Amount	\$174,214	\$44,685	-\$129,529
Number of Outstanding Loans	20	21	+1
Percent of Participants with a Loan	5.4%	5.4%	+0.0
Total Loan Balance	\$67,002	\$79,298	+\$12,296
Average Loan Balance	\$3,350	\$3,776	+\$426
Total Visits to Website	852	921	+69



Plan level data is for informational purposes only. This information is intended for Plan Sponsor, Third Party Administrator and Financial Advisor use only and is not intended to constitute advice concerning plan provisions, plan investments, or plan operation and compliance.



CONTRIBUTION SOURCES

Quarterly Contributions by Source				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Pre Tax	\$260,248	\$259,482	\$201,072	\$254,336
Roth	\$76,223	\$66,078	\$49,058	\$79,522
Rollover	\$10,093	\$13,395	\$0	\$40,080
Total	\$346,564	\$338,955	\$250,129	\$373,938

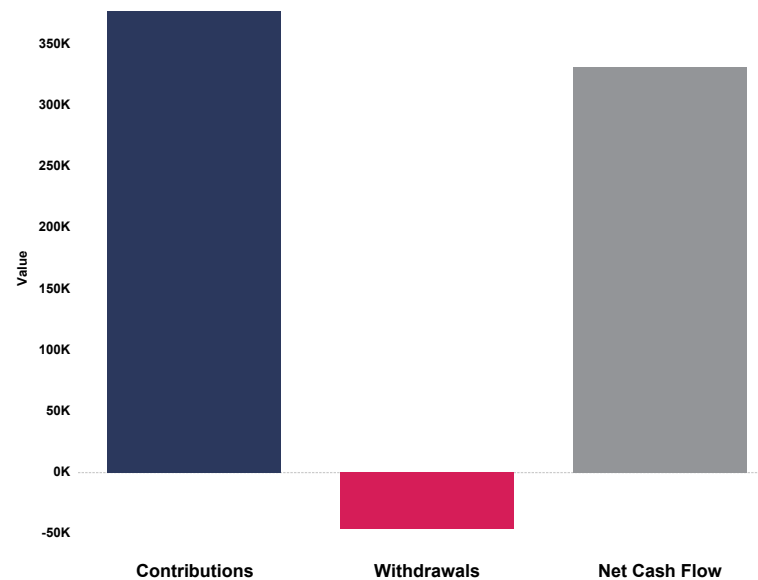
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CASH FLOW AND LOANS

Cash Flow	
	2023 Q4
Contributions	\$373,938
Withdrawals	(\$41,725)
Net Cash Flow	\$332,213

Loans	
	2023 Q4
Loans	(\$18,034)



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EMPLOYER ACCOUNTS



Balance				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Advance Expense Account	\$4,344	\$4,400	\$4,464	\$4,527

Plan Level Unallocated Accounts

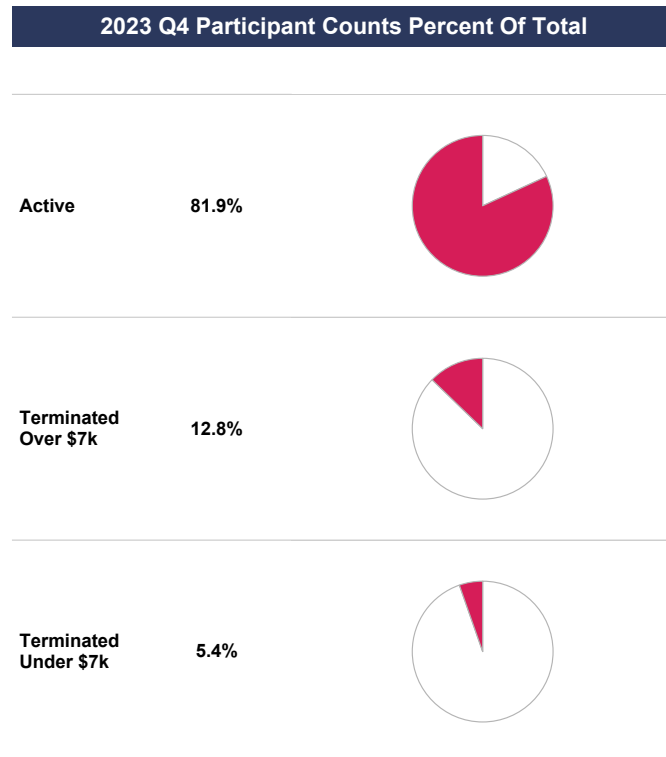
- Forfeitures
- Advance Employer
- Advance Expense / EBA

The plan level unallocated accounts can be accessed via the plan sponsor website which provides convenient access to reports of daily balances and account activity. These accounts should be reviewed regularly to ensure that they are used promptly and in accordance with the terms of the plan.

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PARTICIPANT COUNTS - EMPLOYMENT STATUS



All participants, active and terminated, with a balance.

Participant Counts		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Active	Participants	308	306	302	321
	% Difference from Prior Quarter	+ 0.0%	- 0.6%	- 1.3%	+ 6.3%
Terminated Over \$7k	Participants	43	39	44	50
	% Difference from Prior Quarter	+ 4.9%	- 9.3%	+ 12.8%	+ 13.6%
Terminated Under \$7k	Participants	19	24	26	21
	% Difference from Prior Quarter	- 9.5%	+ 26.3%	+ 8.3%	- 19.2%

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PARTICIPATION

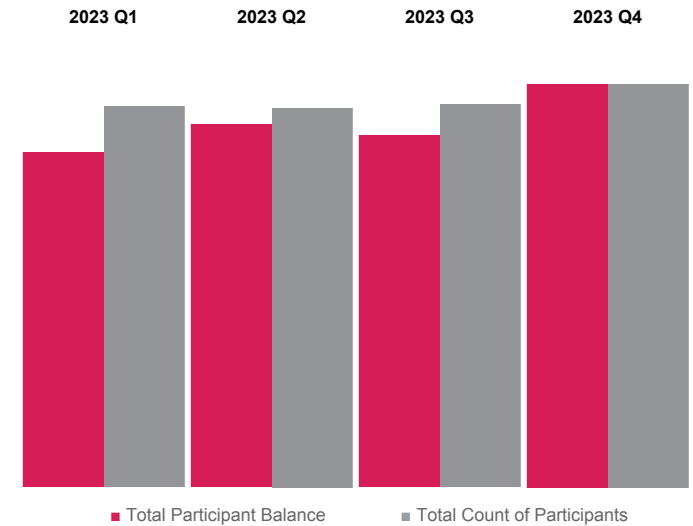
Balance				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Grand Total	\$6.142M	▲ \$6.635M	▼ \$6.440M	▲ \$7.396M
Active	\$4.846M	▲ \$5.313M	▼ \$4.822M	▲ \$5.531M
Terminated	\$1.295M	▲ \$1.323M	▲ \$1.618M	▲ \$1.866M

Count				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Grand Total	370	▼ 369	▲ 372	▲ 392
Active	308	▼ 306	▼ 302	▲ 321
Terminated	62	▲ 63	▲ 70	▲ 71

Average Participant Balance				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Grand Total	\$16,600	\$17,982	\$17,311	\$18,869

Participation Rate				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Grand Total	23.6%	23.0%	24.2%	24.1%

Trend in Participant Balance and Participant Count

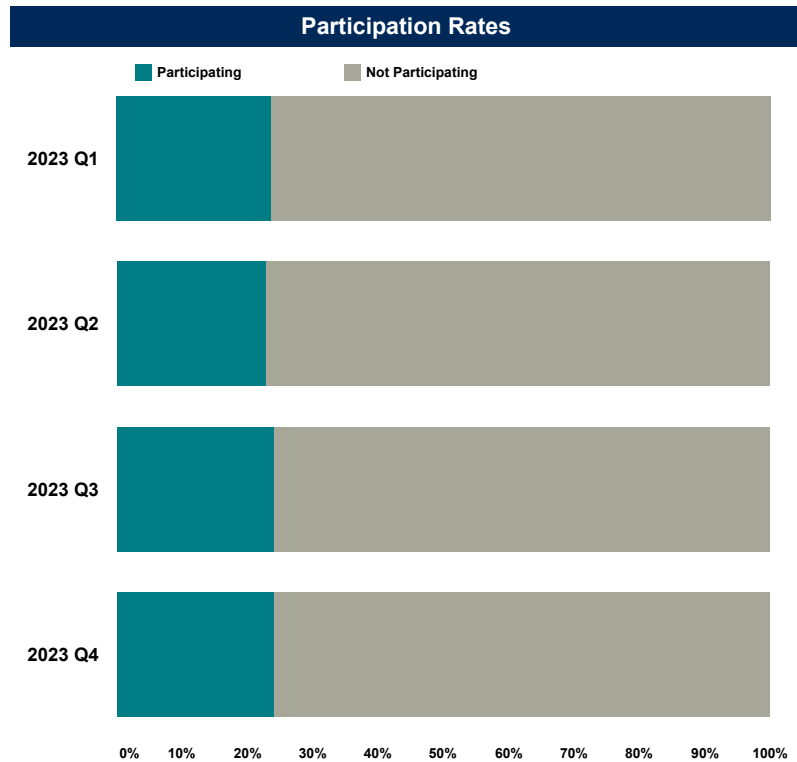


*Balances and counts are represented on individual axes. See table for exact values.

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PARTICIPATION

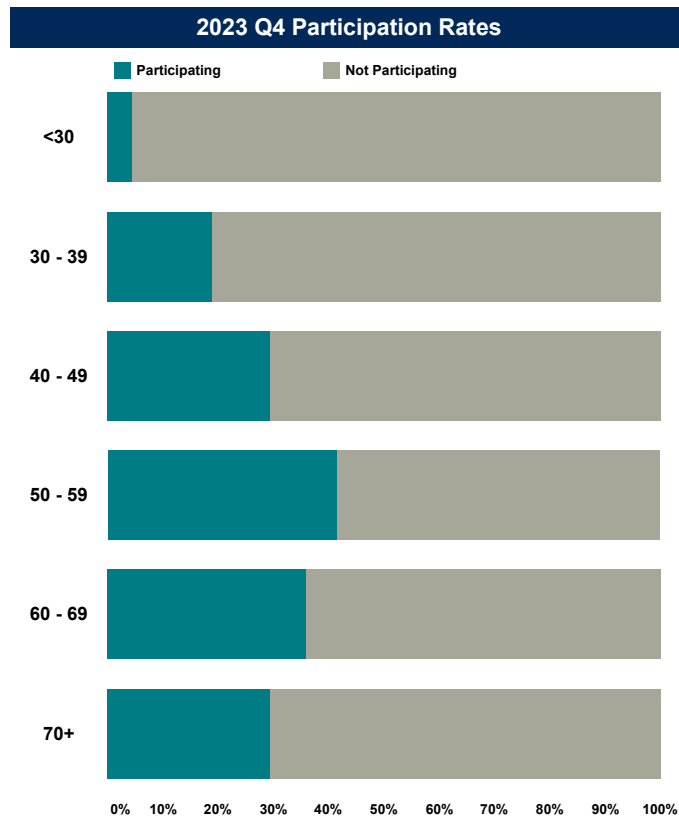


Participation Rates				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Participating	281	280	297	299
Not Participating	909	937	930	941
Participation Rate	23.6%	23.0%	24.2%	24.1%

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PARTICIPATION - AGE BAND

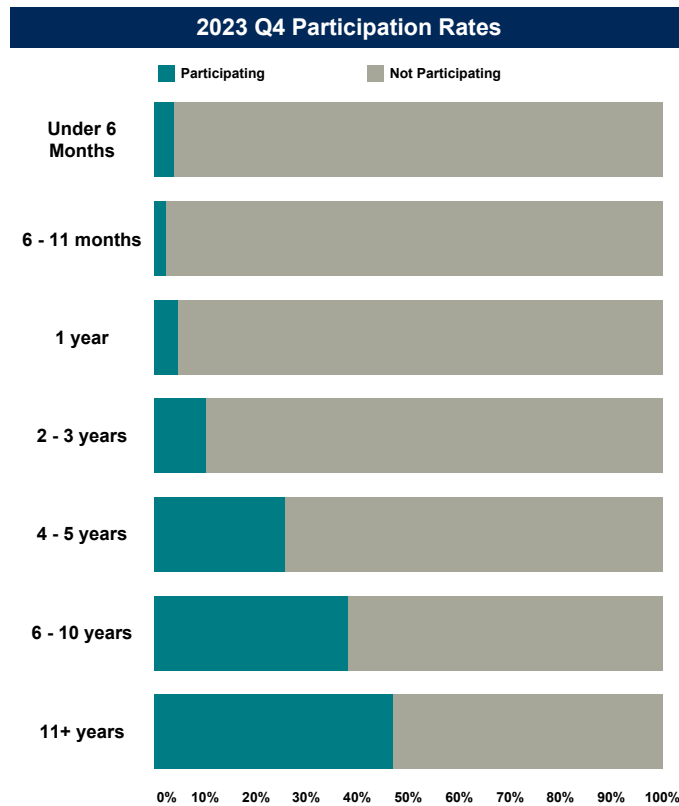


		Participation Counts			
		2023 Q1	2023 Q2	2023 Q3	2023 Q4
<30	Participating	9	9	12	13
	Not Participating	261	269	277	275
	Participation Rate	3.3%	3.2%	4.2%	4.5%
30 - 39	Participating	57	56	60	57
	Not Participating	217	233	237	245
	Participation Rate	20.8%	19.4%	20.2%	18.9%
40 - 49	Participating	77	71	72	77
	Not Participating	189	198	185	185
	Participation Rate	28.9%	26.4%	28.0%	29.4%
50 - 59	Participating	91	94	101	100
	Not Participating	141	139	132	140
	Participation Rate	39.2%	40.3%	43.3%	41.7%
60 - 69	Participating	43	45	46	47
	Not Participating	87	84	85	84
	Participation Rate	33.1%	34.9%	35.1%	35.9%
70+	Participating	4	5	6	5
	Not Participating	14	14	14	12
	Participation Rate	22.2%	26.3%	30.0%	29.4%

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PARTICIPATION - TENURE



		Participation Counts			
		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Under 6 Months	Participating	2		1	5
	Not Participating	93	94	120	126
	Participation Rate	2.1%		0.8%	3.8%
6 - 11 months	Participating	3	6	4	2
	Not Participating	135	137	86	82
	Participation Rate	2.2%	4.2%	4.4%	2.4%
1 year	Participating	7	7	11	10
	Not Participating	151	165	202	198
	Participation Rate	4.4%	4.1%	5.2%	4.8%
2 - 3 years	Participating	13	12	16	17
	Not Participating	143	133	129	150
	Participation Rate	8.3%	8.3%	11.0%	10.2%
4 - 5 years	Participating	41	38	31	30
	Not Participating	88	98	87	86
	Participation Rate	31.8%	27.9%	26.3%	25.9%
6 - 10 years	Participating	59	61	70	71
	Not Participating	93	107	112	115
	Participation Rate	38.8%	36.3%	38.5%	38.2%
11+ years	Participating	156	156	164	164
	Not Participating	206	203	194	184
	Participation Rate	43.1%	43.5%	45.8%	47.1%

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EMPLOYEE CONTRIBUTIONS



Average Deferral				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Average Deferral Rate (%)	7.4%	7.6%	7.2%	7.3%
Average Deferral Rate (\$)	\$181	\$183	\$141	\$135

Deferral By Source									
	2023 Q1		2023 Q2		2023 Q3		2023 Q4		
Average Deferral Rate (%)	Participants	Rate	Participants	Rate	Participants	Rate	Participants	Rate	
Employee Pre-Tax Contribution	115	7.2%	115	7.6%	122	7.2%	123	7.3%	
Employee Roth Contribution	52	5.1%	53	4.9%	61	5.1%	62	4.8%	
Average Deferral Rate (\$)	Participants	Amount	Participants	Amount	Participants	Amount	Participants	Amount	
Employee Pre-Tax Contribution	99	\$184	98	\$185	96	\$150	99	\$142	
Employee Roth Contribution	46	\$124	43	\$130	49	\$87	49	\$86	

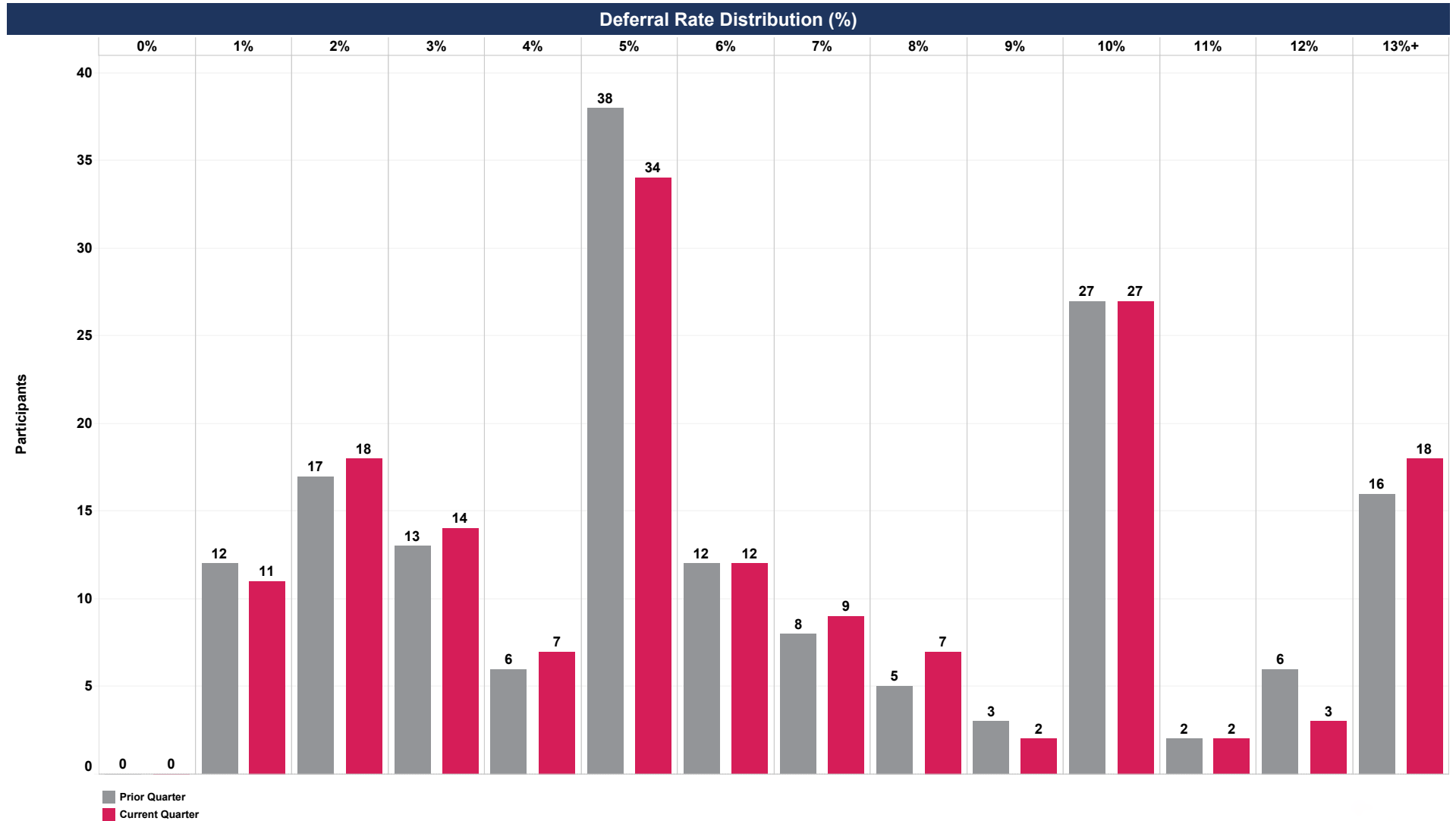
Deferral Rate Targets								
	2023 Q1		2023 Q2		2023 Q3		2023 Q4	
	Participants	% of Total Participants	Participants	% of Total Participants	Participants	% of Total Participants	Participants	% of Total Participants
Under 5%	45	30.2%	44	29.3%	48	29.1%	50	30.5%
At 5%	26	17.4%	27	18.0%	38	23.0%	34	20.7%
Over 5%	78	52.3%	79	52.7%	79	47.9%	80	48.8%

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DEFERRAL RATE DISTRIBUTION (%)

Average deferral rate (%) is calculated using stored deferral percentages that are greater than 0%, and does not include flat dollar amounts.

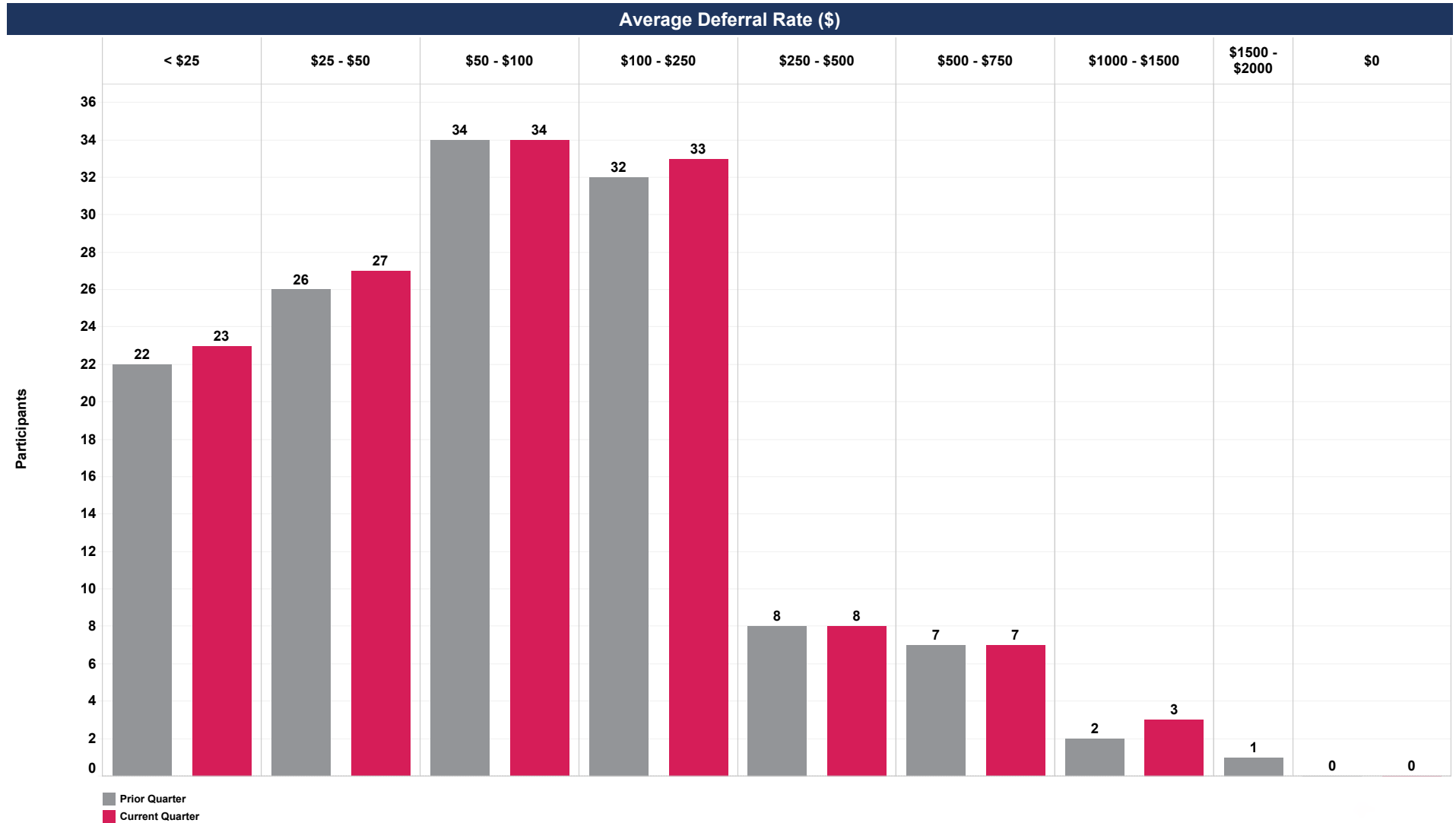


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DEFERRAL RATE DISTRIBUTION (\$)

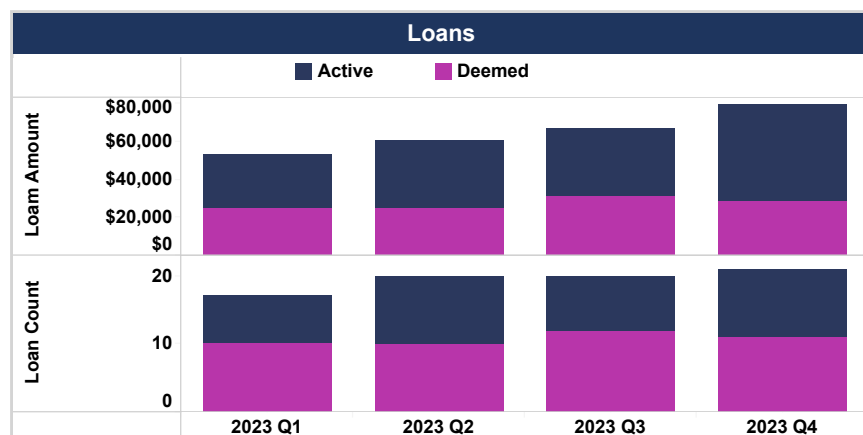
Average Deferral Amount (\$) displays the dollar amount a participant has elected to have withheld each pay period.



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LOAN BALANCE AND COUNTS



Participants With a Loan				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Participants With a Loan	4.6%	5.4%	5.4%	5.4%

Outstanding Loans Held				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
1 Loan	17	20	20	21

Count of participants holding 1, 2, 3 or 4+ outstanding loans as of the last day of the quarter.

Existing Loans data is as of the last day of the quarter.

Existing Loans					
		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Active	Balance	\$28,178	\$35,653	\$35,825	\$50,285
	Loan Count	7	10	8	10
	Participant Count	7	10	8	10
Deemed	Balance	\$25,242	\$25,242	\$31,177	\$29,012
	Loan Count	10	10	12	11
	Participant Count	10	10	12	11
Total	Balance	\$53,420	\$60,895	\$67,002	\$79,298
	Loan Count	17	20	20	21
	Participant Count	17	20	20	21

Deemed taxable distributions generally result from a failure to make scheduled loan repayments in accordance with the loan terms.

New This Period					
		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Active	Balance	\$4,800	\$8,107	\$24,286	\$18,034
	Loan Count	1	3	3	3
	Participant Count	1	3	3	3
Deemed	Balance	\$1,077		\$5,935	
	Loan Count	1		2	
	Participant Count	1		2	
Paid Off	Balance				
	Loan Count			1	
	Participant Count			1	

New This Period data is the total for all months in the quarter.

DISTRIBUTION ACTIVITY AND COUNTS

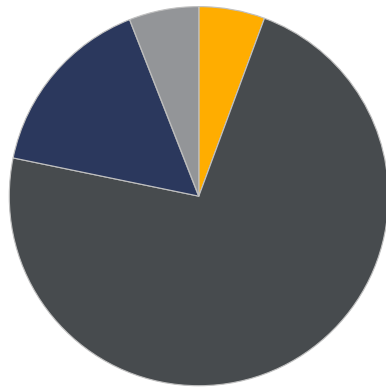
Distribution Amount Percent Of Total In 2023 Q4

Installment 5.6%

Lump Sum 72.6%

Non-Hardship 15.8%

Rollover 5.9%



Participant-Initiated Distributions Processed

	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Online	9.1%	20.0%	54.5%	6.7%
Contact Center	45.5%	20.0%	9.1%	60.0%
Paper Available	45.5%	60.0%	36.4%	33.3%

Distribution Amounts By Type

		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Hardship	Amount			\$3,560	
	Count			1	
Installment	Amount				\$2,511
	Count				1
Lump Sum	Amount	\$19,555	\$44,196	\$11,209	\$32,448
	Count	8	4	3	10
Non-Hardship	Amount	\$3,506		\$33,630	\$7,078
	Count	2		4	3
Rollover	Amount	\$148,085	\$30,764	\$125,815	\$2,648
	Count	2	3	6	2
Total	Amount	\$171,146	\$74,960	\$174,214	\$44,685
	Count	12	7	14	16

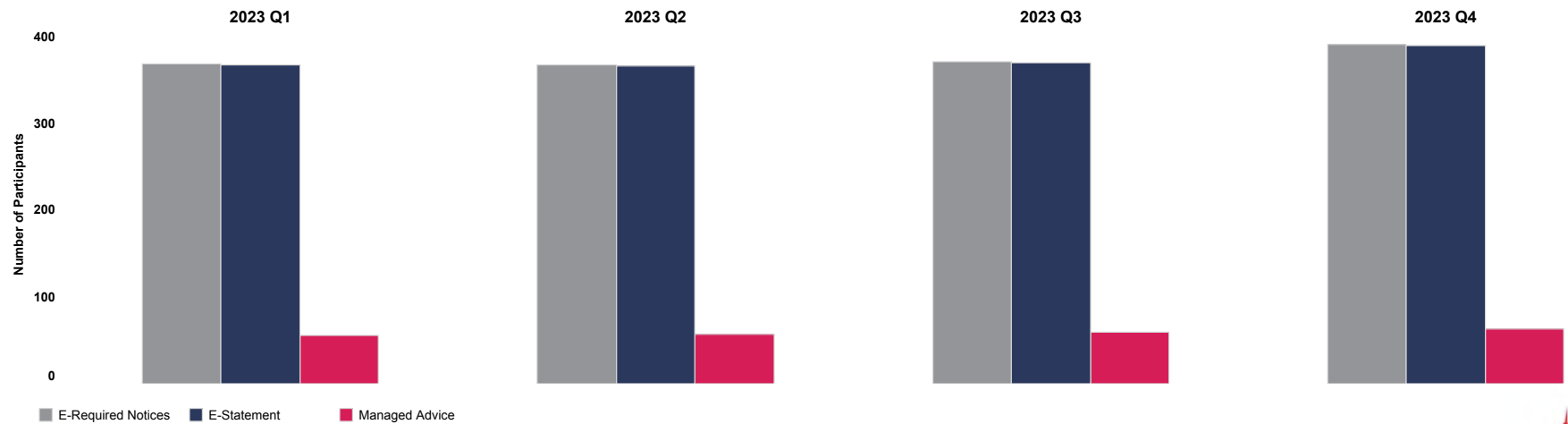
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UTILIZATION OF SERVICES

Participants Enrolled in Services				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
E-Required Notices	369	368	371	391
E-Statement	368	367	370	390
Managed Advice	56	57	59	63

Participant Change From Previous Quarter	
	2023 Q4
E-Required Notices	+20 (+5.39%)
E-Statement	+20 (+5.41%)
Managed Advice	+4 (+6.78%)



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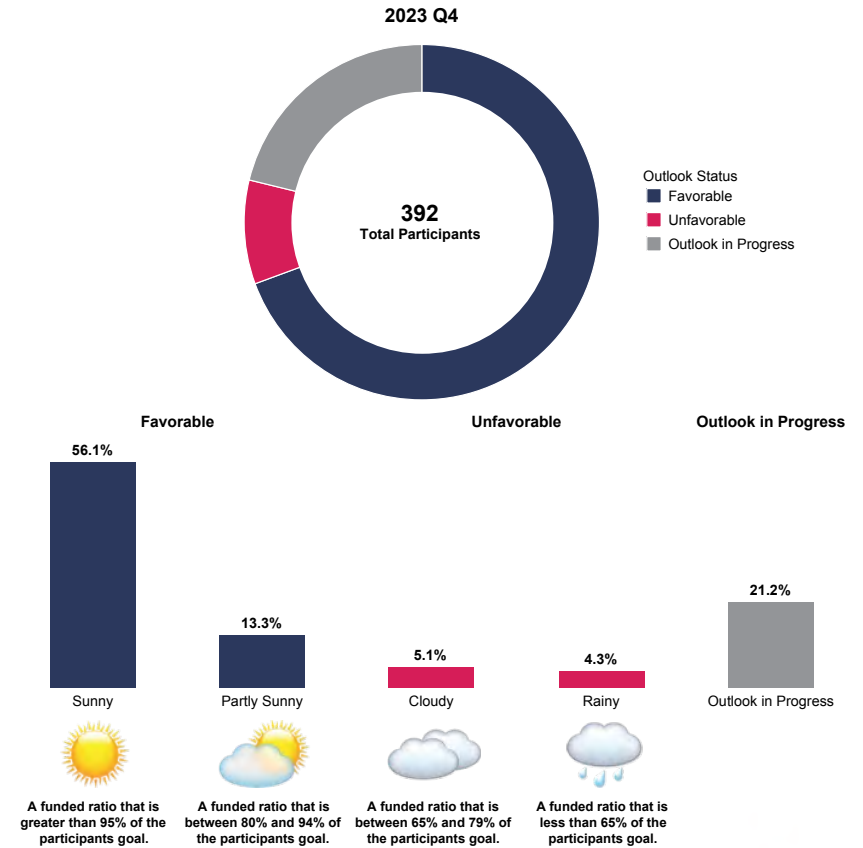


PARTICIPANT ONTRACK OUTLOOK STATUS

Status	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Favorable	269	▼ 267	▼ 265	▲ 272
Unfavorable	38	38	▲ 40	▼ 37
Outlook in Progress	63	▲ 64	▲ 67	▲ 83

Improving Financial and Physical Well-Being

We leverage our scale, proprietary data and insights to deliver personalized education, guidance, and advice to all plan participants — regardless of plan size. The *OnTrack* Communications connects all plan participants to an ecosystem of tools, resources, and professional services.



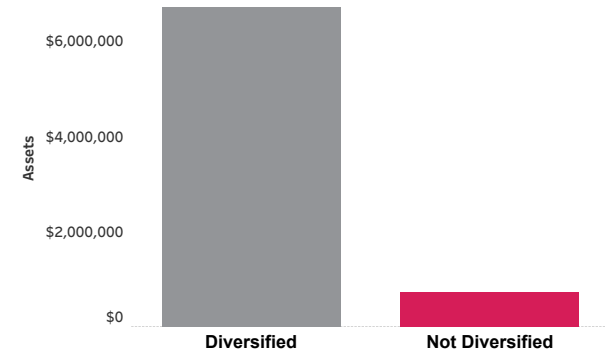
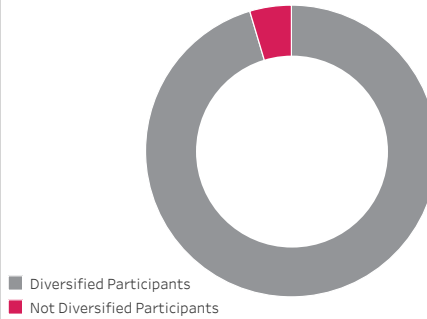
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DIVERSIFICATION

Diversification Assets and Participants in 2023 Q4

<u>Status</u>	<u>Participants</u>	<u>Assets</u>
Diversified	95.41%	\$6.678M
Not Diversified	4.59%	\$718.9K



Diversification Categories in 2023 Q4

<u>Status</u>	<u>Method</u>	<u>Classification</u>	<u>Participants</u>	<u>Assets</u>
Diversified	Diversified Fund Option	100% In a Combination of Diversified Fund Options	1	\$74,706
		100% In a Single Target Date Fund	298	\$5,069,850
		No Asset Categories Exceed 95%	12	\$217,607
	Service	Allocation Managed By a Service	63	\$1,315,465
Not Diversified	Not Diversified	100% In a Single Asset Category (Multiple Funds)	5	\$380,155
		100% In a Single Non-Diversified Fund Option	7	\$52,034
		Greater Than 95% In One Asset Category	6	\$286,669

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PARTICIPANT COUNT AND ASSETS BY FUND

Participant Count And Assets by Fund					
Asset Category	Fund Name	2023 Q4			
		Participants	% of Participants	Assets	% of Assets
Bonds	Eaton Vance High Income Opportunities I	8	2.0%	\$5,145	0.1%
	Fidelity Total Bond	74	18.9%	\$157,865	2.1%
	PIMCO Income Instl	46	11.7%	\$53,373	0.7%
	Standard Stable Asset Fund II	49	12.5%	\$119,775	1.6%
	PIMCO International Bond (USD Hedged) Instl	20	5.1%	\$12,336	0.2%
Stocks	American Funds New World R6	68	17.3%	\$66,156	0.9%
	Calvert US Large Cap Core Rspnb Idx I	9	2.3%	\$42,271	0.6%
	Vanguard 500 Index Admiral	80	20.4%	\$488,045	6.6%
	Vanguard Growth Index Adm	14	3.6%	\$135,703	1.8%
	Vanguard Equity-Income Adm	73	18.6%	\$102,054	1.4%
	JPMorgan Mid Cap Growth R6	62	15.8%	\$89,177	1.2%
	Vanguard Mid-Cap Value Index Admiral	60	15.3%	\$65,976	0.9%
	Calvert Small Cap I	8	2.0%	\$5,516	0.1%
	iShares Russell Small/Mid-Cap Idx K	71	18.1%	\$48,779	0.7%
	PIMCO StocksPLUS Small Institutional	39	9.9%	\$16,030	0.2%
	T. Rowe Price QM U.S. Smll-Cap Grth Eqty	71	18.1%	\$77,937	1.1%
	Vanguard Small Cap Value Index Admiral	74	18.9%	\$90,666	1.2%
	Vanguard FTSE All World ex-US Small Cap Index Adm	23	5.9%	\$13,992	0.2%
	American Beacon Intl Equity R5	73	18.6%	\$104,362	1.4%
	American Funds New Perspective R6	77	19.6%	\$176,778	2.4%
	Impax World Global Envrnmntl Markets Instl	42	10.7%	\$33,350	0.5%
	Vanguard Total Intl Stock Index Admiral	73	18.6%	\$205,896	2.8%
Multi-Asset / Other	T. Rowe Price Spectrum Moderate Gr Allocation	1	0.3%	\$126	0.0%
	Vanguard LifeStrategy Cnsrv Gr Inv	1	0.3%	\$116	0.0%
	American Funds American Balanced R6	43	11.0%	\$58,945	0.8%
	PIMCO RealPath Blend 2025 Institutional	30	7.7%	\$722,952	9.8%
	PIMCO RealPath Blend 2030 Institutional	45	11.5%	\$883,582	11.9%
	PIMCO RealPath Blend 2035 Institutional	55	14.0%	\$1,045,983	14.1%
	PIMCO RealPath Blend 2040 Institutional	42	10.7%	\$590,996	8.0%
	PIMCO RealPath Blend 2045 Institutional	46	11.7%	\$602,253	8.1%
	PIMCO RealPath Blend 2050 Institutional	37	9.4%	\$409,392	5.5%
	PIMCO RealPath Blend 2055 Institutional	24	6.1%	\$172,304	2.3%
	PIMCO RealPath Blend 2060 Institutional	12	3.1%	\$27,856	0.4%
	PIMCO RealPath Blend Income Institutional	27	6.9%	\$770,802	10.4%

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FUND PERFORMANCE

The investment returns are net of fees.

Fund Performance

Asset Category	Fund Name	Participant Count	Assets	3 Month	YTD	1 Year	3 Year	5 Year	10 Year	Life	Net Exp	Revenue Share
Bonds	State Street Instl US Govt Money Market Premier	1	\$4,527	1.34	5.07	5.07	2.21	1.83	1.19	0.94	0.12	0.00
	Fidelity Total Bond	74	\$157,865	6.84	7.25	7.25	-2.28	2.31	2.58	4.06	0.45	0.10
	PIMCO Income Instl	46	\$53,373	5.89	9.32	9.32	1.12	3.40	4.44	6.78	0.62	0.00
	Eaton Vance High Income Opportunities I	8	\$5,145	6.21	11.96	11.96	3.79	6.03	4.85	7.00	0.66	0.15
	PIMCO International Bond (USD Hedged) Instl	20	\$12,336	5.98	9.49	9.49	-0.99	2.04	3.45	6.28	0.63	0.00
Stocks	Vanguard Equity-Income Adm	73	\$102,054	8.99	7.76	7.76	10.63	11.85	9.70	8.39	0.19	0.00
	Calvert US Large Cap Core Rspnb Idx I	9	\$42,271	12.82	27.26	27.26	7.79	15.97	12.06	6.43	0.24	0.10
	Vanguard 500 Index Admiral	80	\$488,045	11.68	26.24	26.24	9.96	15.65	11.99	7.62	0.04	0.00
	Vanguard Growth Index Adm	14	\$135,703	14.41	46.77	46.77	7.69	19.16	13.97	8.21	0.05	0.00
	Vanguard Mid-Cap Value Index Admiral	60	\$65,976	11.51	9.76	9.76	9.18	11.31	8.49	11.84	0.07	0.00
	JPMorgan Mid Cap Growth R6	62	\$89,177	13.21	23.35	23.35	0.00	15.76	11.41	13.89	0.70	0.00
	Vanguard Small Cap Value Index Admiral	74	\$90,666	13.63	15.99	15.99	10.45	11.85	8.49	12.05	0.07	0.00
	Calvert Small Cap I	8	\$5,516	11.55	11.73	11.73	4.07	10.35	8.41	8.37	0.94	0.10
	iShares Russell Small/Mid-Cap Idx K	71	\$48,779	13.20	17.19	17.19	4.16	11.65	0.00	8.78	0.07	0.00
	PIMCO StocksPLUS Small Institutional	39	\$16,030	14.70	17.08	17.08	0.54	9.06	7.05	9.36	0.75	0.00
	T. Rowe Price QM U.S. Smll-Cap Grth Eqty	71	\$77,937	12.65	21.16	21.16	1.52	11.46	9.01	8.02	0.80	0.15
	American Beacon Intl Equity R5	73	\$104,362	9.61	22.46	22.46	6.17	7.64	3.29	6.75	0.72	0.04
	American Funds New Perspective R6	77	\$176,778	11.44	25.01	25.01	3.17	13.90	10.10	12.61	0.42	0.00
	Impax World Global Envrnmntl Markets Instl	42	\$33,350	14.07	16.85	16.85	3.49	12.35	7.60	7.03	0.91	0.10
	Vanguard Total Intl Stock Index Admiral	73	\$205,896	9.93	15.48	15.48	1.76	7.33	4.09	4.86	0.11	0.00
	Vanguard FTSE All World ex-US Small Cap Index ..	23	\$13,992	10.41	15.14	15.14	0.71	6.81	3.89	5.46	0.16	0.00
	American Funds New World R6	68	\$66,156	8.95	16.22	16.22	-1.49	8.93	5.51	8.36	0.57	0.00
Multi-Asset / Other	American Funds American Balanced R6	43	\$58,945	9.96	14.37	14.37	5.40	9.26	7.88	10.44	0.25	0.00
	PIMCO RealPath Blend Income Institutional	27	\$770,802	8.47	10.87	10.87	0.46	6.12	0.00	4.93	0.51	0.00
	PIMCO RealPath Blend 2025 Institutional	30	\$722,952	8.79	11.87	11.87	1.06	7.19	0.00	5.55	0.47	0.00
	PIMCO RealPath Blend 2030 Institutional	45	\$883,582	9.32	13.70	13.70	1.96	8.00	0.00	6.15	0.39	0.00
	PIMCO RealPath Blend 2035 Institutional	55	\$1,045,983	9.86	15.86	15.86	3.40	9.05	0.00	6.76	0.32	0.00
	PIMCO RealPath Blend 2040 Institutional	42	\$590,996	10.16	17.25	17.25	4.24	9.78	0.00	7.20	0.26	0.00
	PIMCO RealPath Blend 2045 Institutional	46	\$602,253	10.47	18.41	18.41	4.85	10.33	0.00	7.46	0.20	0.00
	PIMCO RealPath Blend 2050 Institutional	37	\$409,392	10.63	19.13	19.13	5.30	10.68	0.00	7.67	0.16	0.00
	PIMCO RealPath Blend 2055 Institutional	24	\$172,304	10.76	19.55	19.55	5.57	10.74	0.00	7.69	0.15	0.00
	PIMCO RealPath Blend 2060 Institutional	12	\$27,856	10.87	19.92	19.92	5.80	0.00	0.00	7.65	0.15	0.00
	Vanguard LifeStrategy Cnsrv Gr Inv	1	\$116	8.43	12.48	12.48	0.46	5.52	4.77	6.41	0.12	0.00
	T. Rowe Price Spectrum Moderate Gr Allocation	1	\$126	9.86	18.03	18.03	2.66	9.25	7.31	8.82	0.79	0.15

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PLAN FINANCIAL SUMMARY BY FUND

Financial summary amounts are employee accounts. Unallocated employer accounts have been excluded.

Plan Financials By Fund

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Closing Balance
Grand Total	\$6,439,710	\$14,836	\$373,938	\$0	\$0	\$100,216	\$536,197	\$0	\$0	\$0	\$0	(\$18,034)	\$1,376	(\$41,725)	(\$10,027)	\$7,396,487
T. Rowe Price Spectrum Moderate Gr Allo..	\$115	\$0	\$0	\$0	\$0	\$2	\$9	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$126
PIMCO International Bond (USD Hedged) I..	\$8,945	\$0	\$879	\$0	\$0	\$97	\$646	\$0	\$1,788	\$0	\$0	\$0	\$2	\$0	(\$20)	\$12,336
American Funds New Perspective R6	\$116,405	\$7,280	\$6,776	\$0	\$0	\$2,066	\$8,606	\$0	\$36,365	\$0	\$0	\$0	\$28	(\$515)	(\$234)	\$176,778
American Funds American Balanced R6	\$64,223	\$0	\$1,616	\$0	\$0	\$871	\$4,168	\$0	(\$11,475)	\$0	\$0	\$0	\$0	(\$324)	(\$134)	\$58,945
Vanguard Equity-Income Adm	\$120,682	\$4,708	\$4,759	\$0	\$0	\$938	\$1,687	\$0	(\$29,964)	\$0	\$0	\$0	\$42	(\$623)	(\$176)	\$102,054
Vanguard 500 Index Admiral	\$426,335	\$0	\$12,034	\$0	\$0	\$1,954	\$49,063	\$0	\$1,006	\$0	\$0	\$0	\$87	(\$1,720)	(\$713)	\$488,045
Vanguard FTSE All World ex-US Small Ca..	\$0	\$0	\$167	\$0	\$0	\$241	\$985	\$0	\$12,600	\$0	\$0	\$0	\$5	\$0	(\$5)	\$13,992
Vanguard Growth Index Adm	\$117,852	\$0	\$1,331	\$0	\$0	\$254	\$16,751	\$0	\$0	\$0	\$0	\$0	\$26	(\$349)	(\$162)	\$135,703
Vanguard Mid-Cap Value Index Admiral	\$43,074	\$0	\$2,616	\$0	\$0	\$512	\$7,359	\$0	\$12,517	\$0	\$0	\$0	\$23	(\$23)	(\$101)	\$65,976
Vanguard LifeStrategy Cnsvr Gr Inv	\$107	\$3	\$0	\$0	\$0	\$1	\$5	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$116
Vanguard Small Cap Value Index Admiral	\$67,181	\$0	\$3,179	\$0	\$0	\$578	\$9,917	\$0	\$10,304	\$0	\$0	\$0	\$22	(\$388)	(\$125)	\$90,666
Vanguard Total Intl Stock Index Admiral	\$164,459	\$0	\$9,997	\$0	\$0	\$2,913	\$15,841	\$0	\$14,093	\$0	\$0	\$0	\$53	(\$1,130)	(\$332)	\$205,896
Goldman Sachs Intl Sm Cap Insights Instl	\$36,081	\$0	\$109	\$0	\$0	\$0	(\$1,287)	\$0	(\$34,799)	\$0	\$0	\$0	\$5	(\$86)	(\$22)	\$0
JPMorgan Mid Cap Growth R6	\$68,862	\$0	\$2,642	\$0	\$0	\$0	\$10,778	\$0	\$7,055	\$0	\$0	\$0	\$14	(\$53)	(\$122)	\$89,177
Impax World Global Envrnmntl Markets In..	\$47,092	\$0	\$1,488	\$0	\$0	\$0	\$4,194	\$0	(\$19,308)	\$0	\$0	\$0	\$17	(\$76)	(\$57)	\$33,350
Calvert Small Cap I	\$4,846	\$0	\$103	\$0	\$0	\$17	\$551	\$0	\$0	\$0	\$0	\$0	\$4	\$0	(\$5)	\$5,516
American Beacon Intl Equity R5	\$70,651	\$0	\$4,412	\$0	\$0	\$5,253	\$4,357	\$0	\$20,184	\$0	\$0	\$0	\$28	(\$388)	(\$136)	\$104,362
Eaton Vance High Income Opportunities I	\$4,540	\$0	\$1,236	\$0	\$0	\$71	\$193	\$0	(\$895)	\$0	\$0	\$0	\$4	\$0	(\$4)	\$5,145
PIMCO RealPath Blend Income Institutional	\$668,662	\$0	\$52,611	\$0	\$0	\$12,727	\$47,041	\$0	(\$1,713)	\$0	\$0	\$0	\$0	(\$7,585)	(\$942)	\$770,802
iShares Russell Small/Mid-Cap Idx K	\$65,673	\$0	\$2,394	\$0	\$0	\$505	\$4,056	\$0	(\$23,440)	\$0	\$0	\$0	\$19	(\$284)	(\$144)	\$48,779
PIMCO RealPath Blend 2025 Institutional	\$640,419	\$0	\$30,413	\$0	\$0	\$11,245	\$46,215	\$0	\$0	\$0	\$0	\$0	\$0	(\$4,438)	(\$902)	\$722,952
PIMCO RealPath Blend 2030 Institutional	\$775,211	\$0	\$50,679	\$0	\$0	\$13,610	\$60,673	\$0	\$0	\$0	\$0	(\$6,558)	\$75	(\$8,961)	(\$1,147)	\$883,582
PIMCO RealPath Blend 2035 Institutional	\$908,413	\$0	\$46,457	\$0	\$0	\$16,332	\$76,008	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,227)	\$1,045,983
PIMCO RealPath Blend 2040 Institutional	\$506,060	\$0	\$32,180	\$0	\$0	\$8,895	\$44,372	\$0	\$0	\$0	\$0	\$0	\$825	(\$607)	(\$729)	\$590,996
PIMCO RealPath Blend 2045 Institutional	\$516,474	\$0	\$52,345	\$0	\$0	\$8,447	\$47,105	\$0	\$0	\$0	\$0	(\$11,476)	\$0	(\$9,641)	(\$1,003)	\$602,253
PIMCO RealPath Blend 2050 Institutional	\$352,370	\$0	\$18,933	\$0	\$0	\$5,818	\$32,747	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$475)	\$409,392
PIMCO RealPath Blend 2055 Institutional	\$149,856	\$267	\$9,699	\$0	\$0	\$2,348	\$13,703	\$0	\$0	\$0	\$0	\$0	\$0	(\$3,279)	(\$291)	\$172,304
PIMCO RealPath Blend 2060 Institutional	\$17,564	\$0	\$6,111	\$0	\$0	\$293	\$2,162	\$0	\$1,753	\$0	\$0	\$0	\$0	\$0	(\$27)	\$27,856
American Funds New World R6	\$46,560	\$767	\$2,658	\$0	\$0	\$1,045	\$3,490	\$0	\$12,008	\$0	\$0	\$0	\$21	(\$294)	(\$98)	\$66,156
T. Rowe Price QM U.S. Smll-Cap Grth Eqty	\$63,325	\$1,811	\$2,969	\$0	\$0	\$0	\$6,742	\$0	\$3,435	\$0	\$0	\$0	\$25	(\$288)	(\$82)	\$77,937
Standard Stable Asset Fund II	\$120,317	\$0	\$4,882	\$0	\$0	\$0	\$851	\$0	(\$6,014)	\$0	\$0	\$0	\$2	(\$54)	(\$209)	\$119,775
PIMCO Income Instl	\$60,087	\$0	\$1,552	\$0	\$0	\$840	\$1,990	\$0	(\$10,980)	\$0	\$0	\$0	\$14	(\$31)	(\$98)	\$53,373
Calvert US Large Cap Core Rspnb Idx I	\$36,840	\$0	\$1,045	\$0	\$0	\$422	\$4,329	\$0	\$0	\$0	\$0	\$0	\$8	(\$332)	(\$40)	\$42,271
Fidelity Total Bond	\$140,976	\$0	\$4,853	\$0	\$0	\$1,684	\$8,349	\$0	\$2,465	\$0	\$0	\$0	\$20	(\$240)	(\$242)	\$157,865
PIMCO StocksPLUS Small Institutional	\$9,455	\$0	\$815	\$0	\$0	\$236	\$2,541	\$0	\$3,015	\$0	\$0	\$0	\$7	(\$14)	(\$25)	\$16,030

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PLAN FINANCIAL SUMMARY BY SOURCE

Financial summary amounts are employee accounts. Unallocated employer accounts have been excluded.

Plan Financials By Source

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Participant Count	Closing Balance
Grand Total	\$6,439,710	\$14,836	\$373,938	\$0	\$0	\$100,216	\$536,197	\$0	\$0	\$0	\$0	(\$18,034)	\$1,376	(\$41,725)	(\$10,027)		\$7,396,487
Employee Pre-Tax Contri..	\$5,083,639	\$11,006	\$254,336	\$0	\$0	\$78,794	\$417,025	\$0	\$0	\$0	\$0	(\$7,162)	\$618	(\$37,859)	(\$7,788)	311	\$5,792,609
Employee Roth Contributi..	\$1,019,049	\$2,879	\$79,522	\$0	\$0	\$16,042	\$89,642	\$0	\$0	\$0	\$0	(\$553)	\$728	(\$3,866)	(\$1,569)	149	\$1,201,876
Fund Credit	\$1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	2	\$1
Rollover	\$334,507	\$949	\$40,080	\$0	\$0	\$5,354	\$29,371	\$0	\$0	\$0	\$0	(\$10,319)	\$29	\$0	(\$668)	18	\$399,304
Roth Rollover	\$1,821	\$2	\$0	\$0	\$0	\$26	\$153	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$2)	2	\$2,000
Unclaimed Benefits	\$694	\$0	\$0	\$0	\$0	\$0	\$5	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	3	\$698

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401(A) PLAN DATA

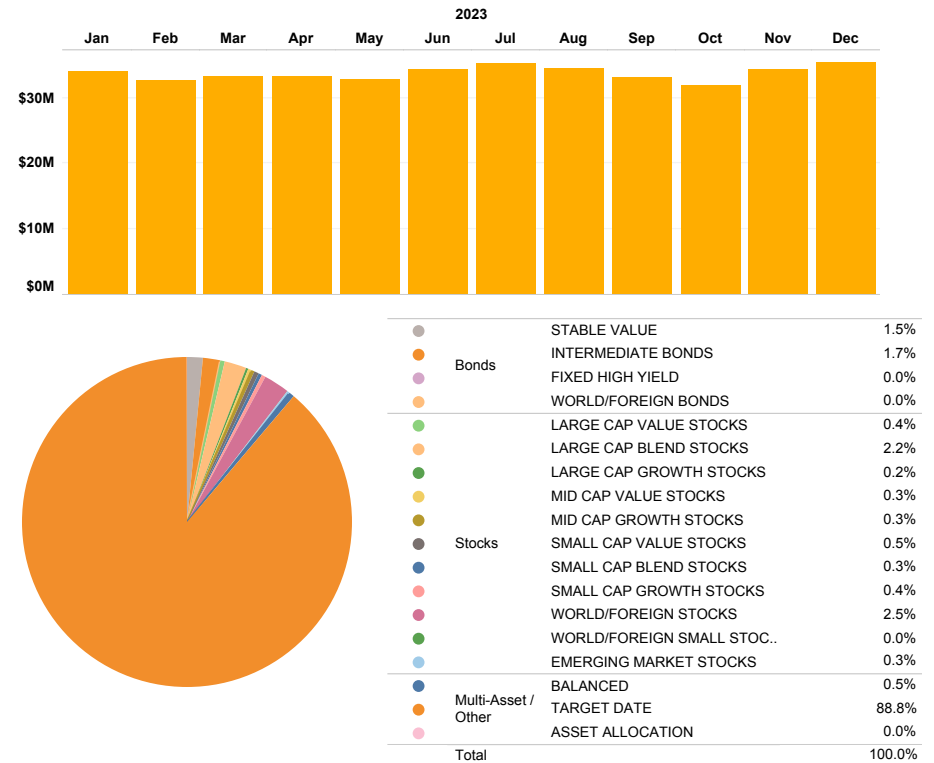


EXECUTIVE SUMMARY

FRESNO COUNTY ECONOMIC OPPORTUNITIES COMMISSION D/B/A FRESNO ECONOMIC

	2023 Q3	2023 Q4	Change
Assets	\$32,970,615	\$35,466,002	+\$2,495,387
Participants with a Balance	982	994	+12
Participation Rate			+0.0
Average Deferral Rate (%)			
Average Deferral Rate (\$)			
Average Participant Balance	\$33,575	\$35,680	+\$2,105
Average Number of Investments	2.1	1.9	-0.2
Total Distribution Amount	\$455,947	\$862,902	+\$406,955
Number of Outstanding Loans			
Percent of Participants with a Loan			
Total Loan Balance			
Average Loan Balance			
Total Visits to Website	936	924	-12

Plan Balance Over 12 Months



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CONTRIBUTION SOURCES

Quarterly Contributions by Source				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Employer	\$105,984	\$526,385	\$528,489	\$323,396
Total	\$105,984	\$526,385	\$528,489	\$323,396

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EMPLOYER ACCOUNTS



Balance				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Advance Employer	\$11	\$11	\$11	\$11
Advance Expense Account	\$63	\$76	\$111	\$125
Forfeiture Credit Account	\$43	\$43	\$44	\$44

Plan Level Unallocated Accounts

- Forfeitures
- Advance Employer
- Advance Expense / EBA

The plan level unallocated accounts can be accessed via the plan sponsor website which provides convenient access to reports of daily balances and account activity. These accounts should be reviewed regularly to ensure that they are used promptly and in accordance with the terms of the plan.

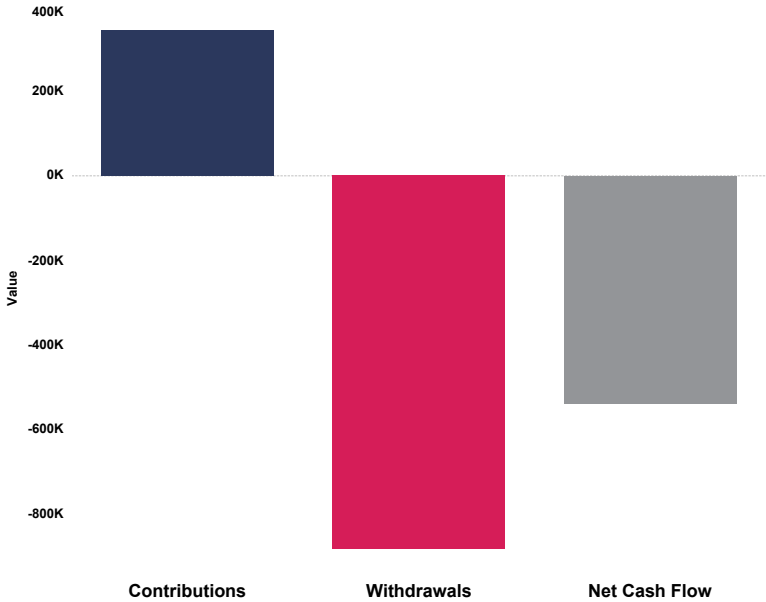
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CASH FLOW AND LOANS

Cash Flow	
	2023 Q4
Contributions	\$323,396
Withdrawals	(\$862,451)
Net Cash Flow	(\$539,055)

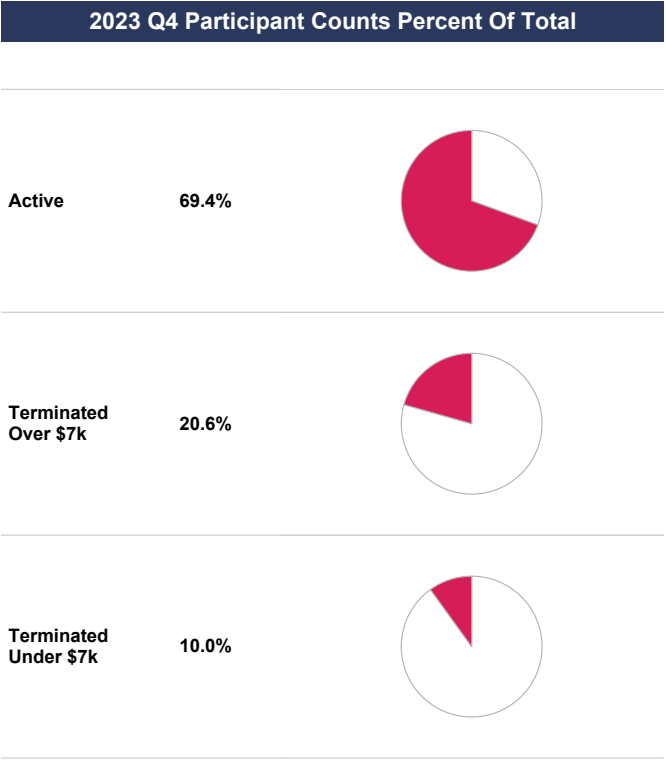
Loans	
	2023 Q4
Loans	\$0



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PARTICIPANT COUNTS - EMPLOYMENT STATUS









All participants, active and terminated, with a balance.

Participant Counts		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Active	Participants	716	705	696	690
	% Difference from Prior Quarter	- 0.7%	- 1.5%	- 1.3%	- 0.9%
Terminated Over \$7k	Participants	190	198	192	205
	% Difference from Prior Quarter	- 5.9%	+ 4.2%	- 3.0%	+ 6.8%
Terminated Under \$7k	Participants	70	86	94	99
	% Difference from Prior Quarter	- 5.4%	+ 22.9%	+ 9.3%	+ 5.3%

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PARTICIPANT COUNTS - AGE BAND

2023 Q4 Participant Counts Percent Of Total		
<30	4.5%	
30 - 39	19.2%	
40 - 49	27.9%	
50 - 59	26.6%	
60 - 69	17.7%	
70+	4.1%	








All participants, active and terminated, with a balance.

Participant Counts		2023 Q1	2023 Q2	2023 Q3	2023 Q4
<30	Participants	43	47	48	45
	% Difference from Prior Quarter	- 6.5%	+ 9.3%	+ 2.1%	- 6.3%
30 - 39	Participants	180	183	182	191
	% Difference from Prior Quarter	- 2.7%	+ 1.7%	- 0.5%	+ 4.9%
40 - 49	Participants	284	282	280	277
	% Difference from Prior Quarter	- 2.1%	- 0.7%	- 0.7%	- 1.1%
50 - 59	Participants	263	269	262	264
	% Difference from Prior Quarter	- 1.1%	+ 2.3%	- 2.6%	+ 0.8%
60 - 69	Participants	168	168	168	176
	% Difference from Prior Quarter	- 3.4%	+ 0.0%	+ 0.0%	+ 4.8%
70+	Participants	38	40	42	41
	% Difference from Prior Quarter	+ 5.6%	+ 5.3%	+ 5.0%	- 2.4%

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PARTICIPANT COUNTS - TENURE

2023 Q4 Participant Count Percent Of Total		
Under 6 Months	0.1%	
6 - 11 months	0.1%	
1 year	0.4%	
2 - 3 years	12.0%	
4 - 5 years	14.7%	
6 - 10 years	23.9%	
11+ years	48.8%	

All participants, active and terminated, with a balance.

		Participant Counts			
		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Under 6 Months	Participants	1	1	1	1
	% Difference from Prior Quarter	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%
6 - 11 months	Participants	1	1	1	1
	% Difference from Prior Quarter	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%
1 year	Participants	4	4	4	4
	% Difference from Prior Quarter	- 33.3%	+ 0.0%	+ 0.0%	+ 0.0%
2 - 3 years	Participants	124	120	113	119
	% Difference from Prior Quarter	- 10.8%	- 3.2%	- 5.8%	+ 5.3%
4 - 5 years	Participants	144	154	144	146
	% Difference from Prior Quarter	+ 3.6%	+ 6.9%	- 6.5%	+ 1.4%
6 - 10 years	Participants	210	221	232	238
	% Difference from Prior Quarter	- 0.9%	+ 5.2%	+ 5.0%	+ 2.6%
11+ years	Participants	492	488	487	485
	% Difference from Prior Quarter	- 1.4%	- 0.8%	- 0.2%	- 0.4%

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DISTRIBUTION ACTIVITY AND COUNTS

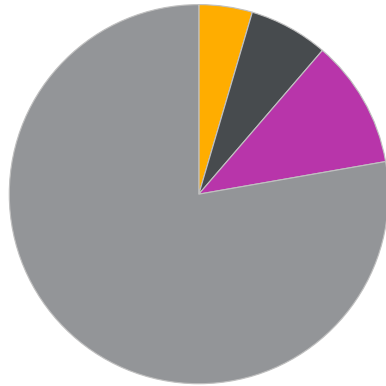
Distribution Amount Percent Of Total In 2023 Q4

Installment 4.5%

Lump Sum 6.7%

Miscellaneous 11.0%

Rollover 77.8%



Participant-Initiated Distributions Processed

	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Online	5.9%	6.8%	6.5%	9.6%
Contact Center	15.7%	6.8%	6.5%	9.6%
Paper Only	60.8%	59.1%	60.9%	61.5%
Paper Available	17.6%	27.3%	26.1%	19.2%

Distribution Amounts By Type

		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Installment	Amount	\$24,212	\$21,087	\$20,562	\$39,245
	Count	27	26	26	30
Lump Sum	Amount	\$261,669	\$138,665	\$213,813	\$58,209
	Count	9	12	12	11
Miscellaneous	Amount	\$66,605		\$20,178	\$94,526
	Count	3		2	2
Required Minimum Distribution	Amount	\$2,500			
	Count	1			
Rollover	Amount	\$430,716	\$257,641	\$201,395	\$670,922
	Count	11	12	12	12
Total	Amount	\$785,701	\$417,393	\$455,947	\$862,902
	Count	51	50	52	55

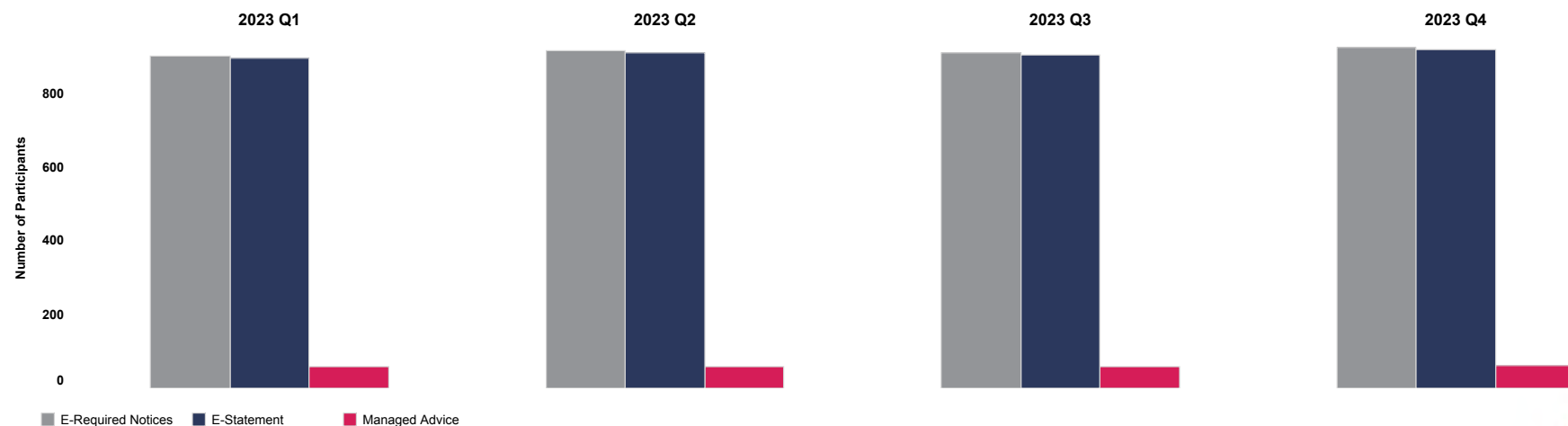
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UTILIZATION OF SERVICES

Participants Enrolled in Services				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
E-Required Notices	901	916	910	925
E-Statement	897	911	904	919
Managed Advice	59	60	60	61

Participant Change From Previous Quarter	
	2023 Q4
E-Required Notices	+15 (+1.65%)
E-Statement	+15 (+1.66%)
Managed Advice	+1 (+1.67%)



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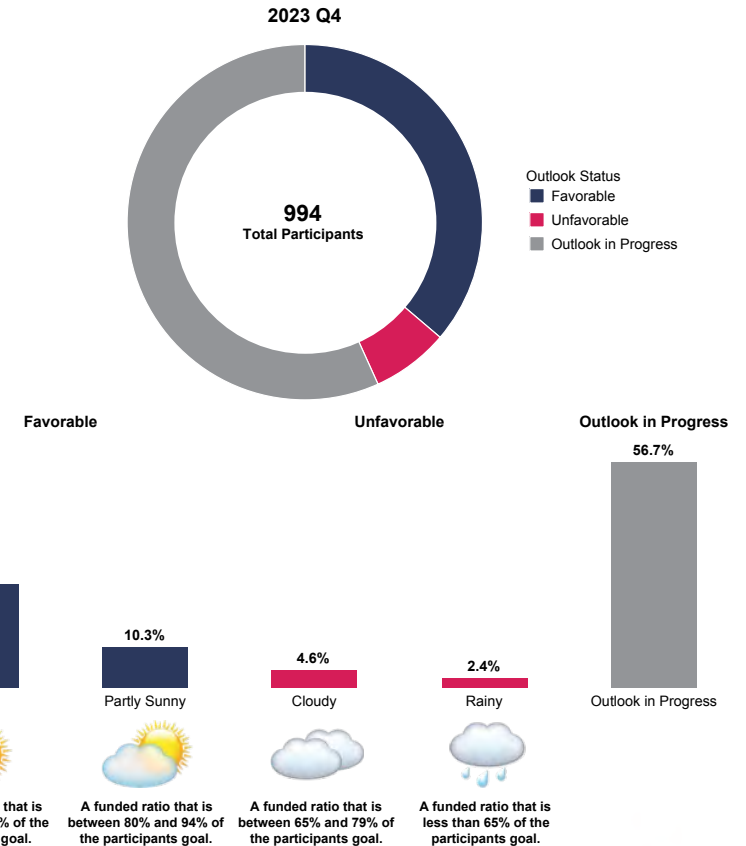


PARTICIPANT ONTRACK OUTLOOK STATUS

Status	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Favorable	353	353	▼ 351	▲ 360
Unfavorable	73	▲ 74	▲ 78	▼ 70
Outlook in Progress	550	▲ 562	▼ 553	▲ 564

Improving Financial and Physical Well-Being

We leverage our scale, proprietary data and insights to deliver personalized education, guidance, and advice to all plan participants — regardless of plan size. The *OnTrack* Communications connects all plan participants to an ecosystem of tools, resources, and professional services.



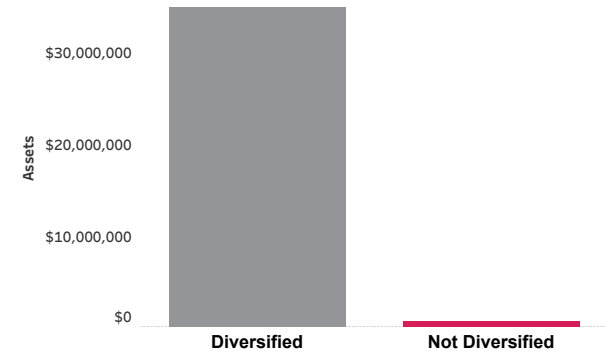
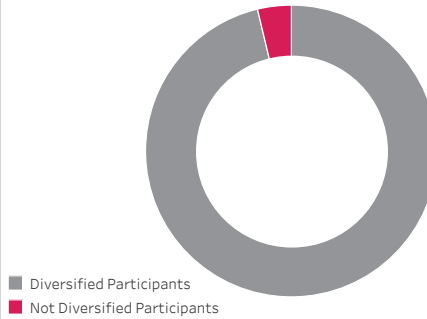
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DIVERSIFICATION

Diversification Assets and Participants in 2023 Q4

<u>Status</u>	<u>Participants</u>	<u>Assets</u>
Diversified	96.28%	\$34.86M
Not Diversified	3.72%	\$603.5K



Diversification Categories in 2023 Q4

<u>Status</u>	<u>Method</u>	<u>Classification</u>	<u>Participants</u>	<u>Assets</u>
Diversified	Diversified Fund Option	100% In a Combination of Diversified Fund Options	1	\$24,847
		100% In a Single Target Date Fund	881	\$31,134,611
		No Asset Categories Exceed 95%	14	\$626,801
	Service	Allocation Managed By a Service	61	\$3,076,266
Not Diversified	Not Diversified	100% In a Single Asset Category (Multiple Funds)	2	\$199,408
		100% In a Single Non-Diversified Fund Option	30	\$272,452
		Greater Than 95% In One Asset Category	5	\$131,617

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PARTICIPANT COUNT AND ASSETS BY FUND

Participant Count And Assets by Fund					
Asset Category	Fund Name	2023 Q4			
		Participants	% of Participants	Assets	% of Assets
Bonds	Eaton Vance High Income Opportunities I	1	0.1%	\$294	0.0%
	Fidelity Total Bond	69	6.9%	\$434,402	1.2%
	PIMCO Income Instl	53	5.3%	\$159,818	0.5%
	Standard Stable Asset Fund II	84	8.5%	\$543,711	1.5%
	PIMCO International Bond (USD Hedged) Instl	13	1.3%	\$12,426	0.0%
Stocks	American Funds New World R6	61	6.1%	\$97,147	0.3%
	Calvert US Large Cap Core Rspnb Idx I	2	0.2%	\$19,275	0.1%
	Vanguard 500 Index Admiral	76	7.6%	\$743,710	2.1%
	Vanguard Growth Index Adm	6	0.6%	\$80,712	0.2%
	Vanguard Equity-Income Adm	64	6.4%	\$149,783	0.4%
	JPMorgan Mid Cap Growth R6	52	5.2%	\$109,472	0.3%
	Vanguard Mid-Cap Value Index Admiral	60	6.0%	\$118,757	0.3%
	Calvert Small Cap I	1	0.1%	\$316	0.0%
	iShares Russell Small/Mid-Cap Idx K	59	5.9%	\$108,316	0.3%
	PIMCO StocksPLUS Small Institutional	19	1.9%	\$12,202	0.0%
	T. Rowe Price QM U.S. Smll-Cap Grth Eqty	65	6.5%	\$136,796	0.4%
	Vanguard Small Cap Value Index Admiral	66	6.6%	\$162,539	0.5%
	Vanguard FTSE All World ex-US Small Cap Index Adm	2	0.2%	\$813	0.0%
	American Beacon Intl Equity R5	65	6.5%	\$180,331	0.5%
	American Funds New Perspective R6	68	6.8%	\$299,547	0.8%
	Impax World Global Envrnmntl Markets Instl	18	1.8%	\$14,866	0.0%
	Vanguard Total Intl Stock Index Admiral	68	6.8%	\$400,923	1.1%
Multi-Asset / Other	T. Rowe Price Spectrum Moderate Gr Allocation	2	0.2%	\$2,287	0.0%
	Vanguard LifeStrategy Cnsrv Gr Inv	1	0.1%	\$1,485	0.0%
	American Funds American Balanced R6	50	5.0%	\$184,593	0.5%
	PIMCO RealPath Blend 2025 Institutional	92	9.3%	\$4,527,109	12.8%
	PIMCO RealPath Blend 2030 Institutional	109	11.0%	\$5,408,045	15.2%
	PIMCO RealPath Blend 2035 Institutional	129	13.0%	\$5,298,104	14.9%
	PIMCO RealPath Blend 2040 Institutional	122	12.3%	\$4,208,638	11.9%
	PIMCO RealPath Blend 2045 Institutional	132	13.3%	\$2,885,751	8.1%
	PIMCO RealPath Blend 2050 Institutional	100	10.1%	\$1,427,192	4.0%
	PIMCO RealPath Blend 2055 Institutional	72	7.2%	\$598,516	1.7%
	PIMCO RealPath Blend 2060 Institutional	52	5.2%	\$207,694	0.6%
	PIMCO RealPath Blend Income Institutional	90	9.1%	\$6,930,432	19.5%

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FUND PERFORMANCE

The investment returns are net of fees.

Fund Performance

Asset Category	Fund Name	Participant Count	Assets	3 Month	YTD	1 Year	3 Year	5 Year	10 Year	Life	Net Exp	Revenue Share
Bonds	State Street Instl US Govt Money Market Premier	1	\$180	1.34	5.07	5.07	2.21	1.83	1.19	0.94	0.12	0.00
	Fidelity Total Bond	69	\$434,402	6.84	7.25	7.25	-2.28	2.31	2.58	4.06	0.45	0.10
	PIMCO Income Instl	53	\$159,818	5.89	9.32	9.32	1.12	3.40	4.44	6.78	0.62	0.00
	Eaton Vance High Income Opportunities I	1	\$294	6.21	11.96	11.96	3.79	6.03	4.85	7.00	0.66	0.15
	PIMCO International Bond (USD Hedged) Instl	13	\$12,426	5.98	9.49	9.49	-0.99	2.04	3.45	6.28	0.63	0.00
Stocks	Vanguard Equity-Income Adm	64	\$149,783	8.99	7.76	7.76	10.63	11.85	9.70	8.39	0.19	0.00
	Calvert US Large Cap Core Rspnb Idx I	2	\$19,275	12.82	27.26	27.26	7.79	15.97	12.06	6.43	0.24	0.10
	Vanguard 500 Index Admiral	76	\$743,710	11.68	26.24	26.24	9.96	15.65	11.99	7.62	0.04	0.00
	Vanguard Growth Index Adm	6	\$80,712	14.41	46.77	46.77	7.69	19.16	13.97	8.21	0.05	0.00
	Vanguard Mid-Cap Value Index Admiral	60	\$118,757	11.51	9.76	9.76	9.18	11.31	8.49	11.84	0.07	0.00
	JPMorgan Mid Cap Growth R6	52	\$109,472	13.21	23.35	23.35	0.00	15.76	11.41	13.89	0.70	0.00
	Vanguard Small Cap Value Index Admiral	66	\$162,539	13.63	15.99	15.99	10.45	11.85	8.49	12.05	0.07	0.00
	Calvert Small Cap I	1	\$316	11.55	11.73	11.73	4.07	10.35	8.41	8.37	0.94	0.10
	iShares Russell Small/Mid-Cap Idx K	59	\$108,316	13.20	17.19	17.19	4.16	11.65	0.00	8.78	0.07	0.00
	PIMCO StocksPLUS Small Institutional	19	\$12,202	14.70	17.08	17.08	0.54	9.06	7.05	9.36	0.75	0.00
	T. Rowe Price QM U.S. Smll-Cap Grth Eqty	65	\$136,796	12.65	21.16	21.16	1.52	11.46	9.01	8.02	0.80	0.15
	American Beacon Intl Equity R5	65	\$180,331	9.61	22.46	22.46	6.17	7.64	3.29	6.75	0.72	0.04
	American Funds New Perspective R6	68	\$299,547	11.44	25.01	25.01	3.17	13.90	10.10	12.61	0.42	0.00
	Impax World Global Envrnmntl Markets Instl	18	\$14,866	14.07	16.85	16.85	3.49	12.35	7.60	7.03	0.91	0.10
	Vanguard Total Intl Stock Index Admiral	68	\$400,923	9.93	15.48	15.48	1.76	7.33	4.09	4.86	0.11	0.00
	Vanguard FTSE All World ex-US Small Cap Index ..	2	\$813	10.41	15.14	15.14	0.71	6.81	3.89	5.46	0.16	0.00
	American Funds New World R6	61	\$97,147	8.95	16.22	16.22	-1.49	8.93	5.51	8.36	0.57	0.00
Multi-Asset / Other	American Funds American Balanced R6	50	\$184,593	9.96	14.37	14.37	5.40	9.26	7.88	10.44	0.25	0.00
	PIMCO RealPath Blend Income Institutional	90	\$6,930,432	8.47	10.87	10.87	0.46	6.12	0.00	4.93	0.51	0.00
	PIMCO RealPath Blend 2025 Institutional	92	\$4,527,109	8.79	11.87	11.87	1.06	7.19	0.00	5.55	0.47	0.00
	PIMCO RealPath Blend 2030 Institutional	109	\$5,408,045	9.32	13.70	13.70	1.96	8.00	0.00	6.15	0.39	0.00
	PIMCO RealPath Blend 2035 Institutional	129	\$5,298,104	9.86	15.86	15.86	3.40	9.05	0.00	6.76	0.32	0.00
	PIMCO RealPath Blend 2040 Institutional	122	\$4,208,638	10.16	17.25	17.25	4.24	9.78	0.00	7.20	0.26	0.00
	PIMCO RealPath Blend 2045 Institutional	132	\$2,885,751	10.47	18.41	18.41	4.85	10.33	0.00	7.46	0.20	0.00
	PIMCO RealPath Blend 2050 Institutional	100	\$1,427,192	10.63	19.13	19.13	5.30	10.68	0.00	7.67	0.16	0.00
	PIMCO RealPath Blend 2055 Institutional	72	\$598,516	10.76	19.55	19.55	5.57	10.74	0.00	7.69	0.15	0.00
	PIMCO RealPath Blend 2060 Institutional	52	\$207,694	10.87	19.92	19.92	5.80	0.00	0.00	7.65	0.15	0.00
	Vanguard LifeStrategy Cnsrv Gr Inv	1	\$1,485	8.43	12.48	12.48	0.46	5.52	4.77	6.41	0.12	0.00
	T. Rowe Price Spectrum Moderate Gr Allocation	2	\$2,287	9.86	18.03	18.03	2.66	9.25	7.31	8.82	0.79	0.15

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PLAN FINANCIAL SUMMARY BY FUND

Financial summary amounts are employee accounts. Unallocated employer accounts have been excluded.

Plan Financials By Fund

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Closing Balance
Grand Total	\$32,970,615	\$25,490	\$323,396	\$79	\$0	\$525,362	\$2,529,077	\$0	\$0	\$0	\$0	\$0	\$0	(\$862,451)	(\$45,566)	\$35,466,002
T. Rowe Price Spectrum Moderate Gr Allo..	\$1,848	\$0	\$250	\$0	\$0	\$40	\$151	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$2)	\$2,287
PIMCO International Bond (USD Hedged) I..	\$43,724	\$0	\$807	\$0	\$0	\$297	\$1,821	\$0	(\$33,267)	\$0	\$0	\$0	\$0	(\$880)	(\$75)	\$12,426
American Funds New Perspective R6	\$233,700	\$12,489	\$3,179	\$0	\$0	\$3,544	\$14,703	\$0	\$55,293	\$0	\$0	\$0	\$0	(\$22,891)	(\$470)	\$299,547
American Funds American Balanced R6	\$156,398	\$0	\$1,226	\$0	\$0	\$2,892	\$13,704	\$0	\$29,418	\$0	\$0	\$0	\$0	(\$18,731)	(\$313)	\$184,593
Vanguard Equity-Income Adm	\$192,491	\$7,669	\$1,875	\$0	\$0	\$1,528	\$4,342	\$0	(\$41,054)	\$0	\$0	\$0	\$0	(\$16,744)	(\$323)	\$149,783
Vanguard 500 Index Admiral	\$736,800	\$0	\$5,755	\$0	\$0	\$3,194	\$81,628	\$0	(\$25,128)	\$0	\$0	\$0	\$0	(\$57,253)	(\$1,286)	\$743,710
Vanguard FTSE All World ex-US Small Ca..	\$0	\$0	\$157	\$0	\$0	\$14	\$60	\$0	\$583	\$0	\$0	\$0	\$0	\$0	\$0	\$813
Vanguard Growth Index Adm	\$70,256	\$0	\$423	\$0	\$0	\$151	\$9,978	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$96)	\$80,712
Vanguard Mid-Cap Value Index Admiral	\$116,545	\$0	\$1,101	\$0	\$0	\$992	\$14,216	\$0	(\$3,562)	\$0	\$0	\$0	\$0	(\$10,306)	(\$229)	\$118,757
Vanguard LifeStrategy Cnsvr Gr Inv	\$1,371	\$33	\$0	\$0	\$0	\$19	\$64	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$2)	\$1,485
Vanguard Small Cap Value Index Admiral	\$139,338	\$0	\$1,398	\$0	\$0	\$1,009	\$18,792	\$0	\$17,461	\$0	\$0	\$0	\$0	(\$15,197)	(\$261)	\$162,539
Vanguard Total Intl Stock Index Admiral	\$387,444	\$0	\$4,786	\$0	\$0	\$6,033	\$32,439	\$0	\$4,268	\$0	\$0	\$0	\$0	(\$33,316)	(\$732)	\$400,923
Goldman Sachs Intl Sm Cap Insights Instl	\$17,322	\$0	\$0	\$0	\$0	\$0	(\$535)	\$0	(\$16,780)	\$0	\$0	\$0	\$0	\$0	(\$7)	\$0
JPMorgan Mid Cap Growth R6	\$118,560	\$0	\$1,293	\$0	\$0	\$0	\$15,563	\$0	(\$13,851)	\$0	\$0	\$0	\$0	(\$11,871)	(\$223)	\$109,472
Impax World Global Envrnmntl Markets In..	\$53,847	\$0	\$461	\$0	\$0	\$0	\$3,947	\$0	(\$41,750)	\$0	\$0	\$0	\$0	(\$1,570)	(\$70)	\$14,866
Calvert Small Cap I	\$284	\$0	\$0	\$0	\$0	\$1	\$32	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$316
American Beacon Intl Equity R5	\$136,785	\$0	\$2,028	\$0	\$0	\$8,818	\$5,924	\$0	\$44,905	\$0	\$0	\$0	\$0	(\$17,876)	(\$254)	\$180,331
Eaton Vance High Income Opportunities I	\$277	\$0	\$0	\$0	\$0	\$5	\$13	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$294
PIMCO RealPath Blend Income Institutional	\$6,703,543	\$0	\$22,337	\$0	\$0	\$114,914	\$450,033	\$0	\$0	\$0	\$0	\$0	\$0	(\$351,499)	(\$8,897)	\$6,930,432
iShares Russell Small/Mid-Cap Idx K	\$109,850	\$0	\$1,563	\$0	\$0	\$1,047	\$11,438	\$0	(\$8,945)	\$0	\$0	\$0	\$0	(\$6,378)	(\$258)	\$108,316
PIMCO RealPath Blend 2025 Institutional	\$4,140,794	\$0	\$31,599	\$0	\$0	\$70,625	\$293,679	\$0	\$0	\$0	\$0	\$0	\$0	(\$4,125)	(\$5,462)	\$4,527,109
PIMCO RealPath Blend 2030 Institutional	\$4,961,500	\$0	\$32,657	\$0	\$0	\$82,879	\$376,509	\$0	\$0	\$0	\$0	\$0	\$0	(\$38,931)	(\$6,568)	\$5,408,045
PIMCO RealPath Blend 2035 Institutional	\$4,927,908	\$0	\$43,084	\$0	\$0	\$83,036	\$386,630	\$0	(\$61,069)	\$0	\$0	\$0	\$0	(\$75,037)	(\$6,448)	\$5,298,104
PIMCO RealPath Blend 2040 Institutional	\$3,809,372	\$0	\$38,411	\$0	\$0	\$63,699	\$323,328	\$0	\$0	\$0	\$0	\$0	\$0	(\$21,077)	(\$5,096)	\$4,208,638
PIMCO RealPath Blend 2045 Institutional	\$2,613,061	\$0	\$40,634	\$0	\$0	\$40,647	\$234,000	\$0	\$0	\$0	\$0	\$0	\$0	(\$39,121)	(\$3,469)	\$2,885,751
PIMCO RealPath Blend 2050 Institutional	\$1,257,002	\$0	\$36,903	\$0	\$0	\$20,299	\$114,662	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,673)	\$1,427,192
PIMCO RealPath Blend 2055 Institutional	\$526,438	\$928	\$21,942	\$0	\$0	\$8,151	\$47,693	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,851)	(\$785)	\$598,516
PIMCO RealPath Blend 2060 Institutional	\$182,931	\$0	\$17,805	\$0	\$0	\$2,213	\$17,623	\$0	\$0	\$0	\$0	\$0	\$0	(\$12,562)	(\$317)	\$207,694
American Funds New World R6	\$117,418	\$1,373	\$1,338	\$0	\$0	\$1,871	\$6,704	\$0	(\$22,565)	\$0	\$0	\$0	\$0	(\$8,765)	(\$227)	\$97,147
T. Rowe Price QM U.S. Smll-Cap Grth Eqty	\$87,680	\$2,998	\$1,443	\$0	\$0	\$0	\$10,253	\$0	\$46,341	\$0	\$0	\$0	\$0	(\$11,795)	(\$125)	\$136,796
Standard Stable Asset Fund II	\$535,921	\$0	\$3,412	\$79	\$0	\$0	\$3,929	\$0	\$25,856	\$0	\$0	\$0	\$0	(\$24,615)	(\$871)	\$543,711
PIMCO Income Instl	\$118,512	\$0	\$1,347	\$0	\$0	\$2,093	\$5,767	\$0	\$43,866	\$0	\$0	\$0	\$0	(\$11,533)	(\$236)	\$159,818
Calvert US Large Cap Core Rspnb Idx I	\$16,846	\$0	\$277	\$0	\$0	\$193	\$1,976	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$18)	\$19,275
Fidelity Total Bond	\$424,956	\$0	\$3,567	\$0	\$0	\$4,973	\$24,564	\$0	\$20,042	\$0	\$0	\$0	\$0	(\$42,984)	(\$716)	\$434,402
PIMCO StocksPLUS Small Institutional	\$29,893	\$0	\$339	\$0	\$0	\$185	\$3,446	\$0	(\$20,061)	\$0	\$0	\$0	\$0	(\$1,545)	(\$55)	\$12,202

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PLAN FINANCIAL SUMMARY BY SOURCE

Financial summary amounts are employee accounts. Unallocated employer accounts have been excluded.

Plan Financials By Source

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Participant Count	Closing Balance
Grand Total	\$32,970,615	\$25,490	\$323,396	\$79	\$0	\$525,362	\$2,529,077	\$0	\$0	\$0	\$0	\$0	\$0	(\$862,451)	(\$45,566)		\$35,466,002
Employee After-Tax Contr..	\$1,552,889	\$1,548	\$0	\$0	\$0	\$24,941	\$113,936	\$0	\$0	\$0	\$0	\$0	\$0	(\$41,068)	(\$2,159)	160	\$1,650,087
Employer Contribution	\$31,413,335	\$23,942	\$323,396	\$0	\$0	\$500,421	\$2,415,111	\$0	\$0	\$0	\$0	\$0	\$0	(\$820,197)	(\$43,398)	968	\$33,812,610
Fund Credit	\$1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	3	\$1
Unclaimed Benefits	\$4,390	\$0	\$0	\$79	\$0	\$0	\$29	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,186)	(\$8)	29	\$3,303

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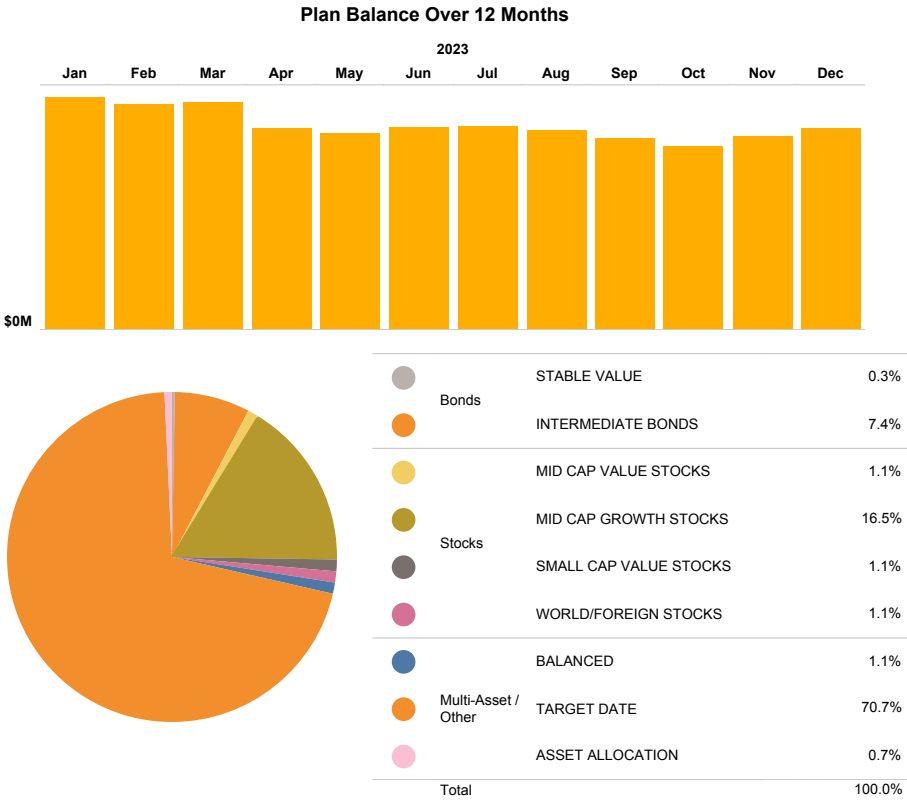
457(B) PLAN DATA



EXECUTIVE SUMMARY

FRESNO COUNTY ECONOMIC OPPORTUNITIES COMMISSION D/B/A FRESNO ECONOMIC

	2023 Q3	2023 Q4	Change
Assets	\$522,688	\$550,962	+\$28,274
Participants with a Balance	7	6	-1
Participation Rate	7.7%	7.7%	+0.0
Average Deferral Rate (%)			+0.0
Average Deferral Rate (\$)	\$2,308	\$2,308	+\$0
Average Participant Balance	\$74,670	\$91,827	+\$17,157
Average Number of Investments	1.9	2.0	+0.1
Total Distribution Amount	\$23,416	\$34,750	+\$11,334
Number of Outstanding Loans			
Percent of Participants with a Loan			
Total Loan Balance			
Average Loan Balance			
Total Visits to Website	30	18	-12



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CONTRIBUTION SOURCES

Quarterly Contributions by Source				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Pre Tax	\$0	\$0	\$11,540	\$10,960
Employer	\$5,576	\$5,707	\$4,892	\$5,707
Total	\$5,576	\$5,707	\$16,432	\$16,667

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CASH FLOW AND LOANS

Cash Flow	
2023 Q4	
Contributions	\$16,667
Withdrawals	(\$34,750)
Net Cash Flow	(\$18,084)

Loans	
2023 Q4	
Loans	\$0



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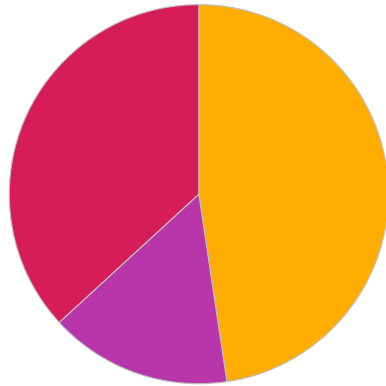
DISTRIBUTION ACTIVITY AND COUNTS

Distribution Amount Percent Of Total In 2023 Q4

Installment 47.6%

Miscellaneous 15.5%

Required Minimum Distribution 36.8%



Participant-Initiated Distributions Processed

	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Paper Only	100.0%	100.0%	100.0%	100.0%

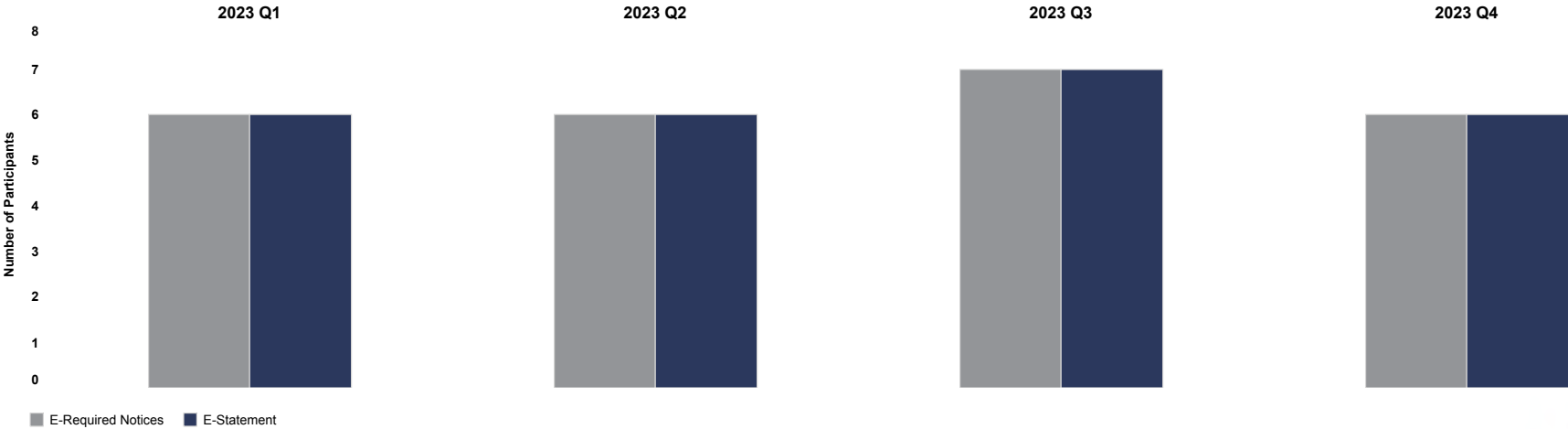
Distribution Amounts By Type

		2023 Q1	2023 Q2	2023 Q3	2023 Q4
Installment	Amount	\$18,016	\$84,016	\$18,016	\$16,556
	Count	7	8	7	7
Miscellaneous	Amount	\$5,400	\$5,400	\$5,400	\$5,400
	Count	3	3	3	3
Required Minimum Distribution	Amount				\$12,794
	Count				1
Total	Amount	\$23,416	\$89,416	\$23,416	\$34,750
	Count	10	11	10	11

UTILIZATION OF SERVICES

Participants Enrolled in Services				
	2023 Q1	2023 Q2	2023 Q3	2023 Q4
E-Required Notices	6	6	7	6
E-Statement	6	6	7	6

Participant Change From Previous Quarter	
	2023 Q4
E-Required Notices	-1 (-14.29%)
E-Statement	-1 (-14.29%)



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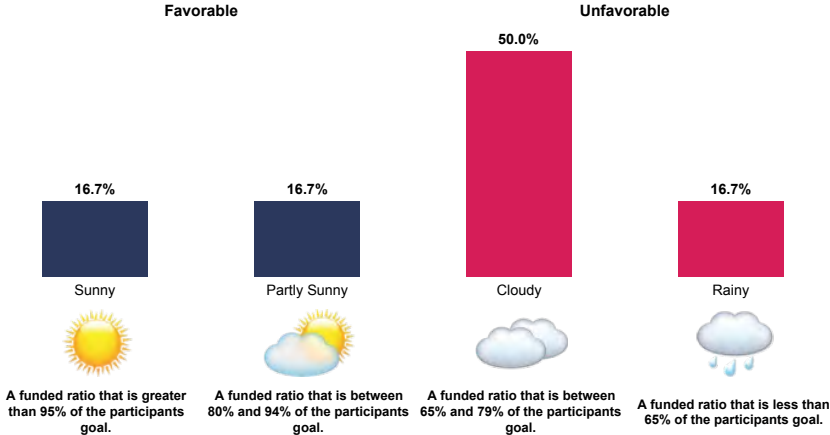
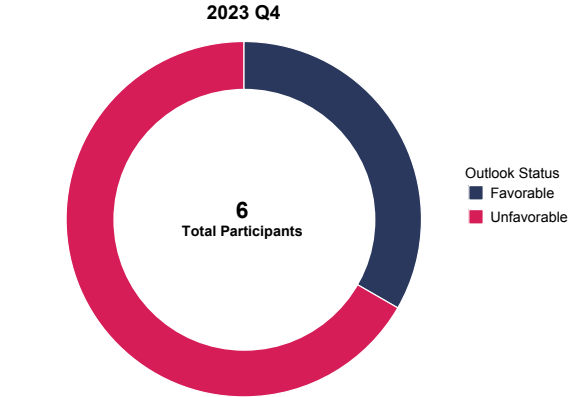


PARTICIPANT ONTRACK OUTLOOK STATUS

Status	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Favorable	1	▼	1	▲ 2
Unfavorable	5	▲ 6	6	▼ 4

Improving Financial and Physical Well-Being

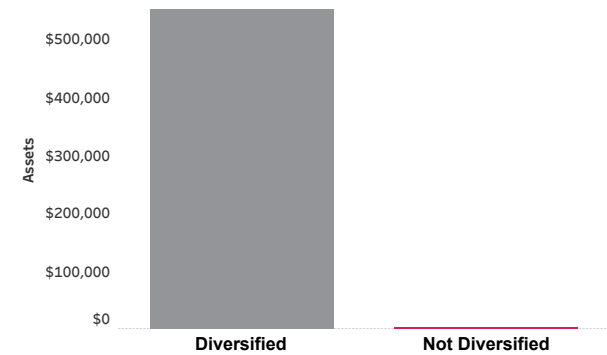
We leverage our scale, proprietary data and insights to deliver personalized education, guidance, and advice to all plan participants — regardless of plan size. The *OnTrack* Communications connects all plan participants to an ecosystem of tools, resources, and professional services.



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<u>Status</u>	<u>Participants</u>	<u>Assets</u>
Diversified	83.33%	\$549.5K
Not Diversified	16.67%	\$1,456



<u>Status</u>	<u>Method</u>	<u>Classification</u>	<u>Participants</u>	<u>Assets</u>
Diversified	Diversified Fund Option	100% In a Single Target Date Fund	2	\$349,938
	No Asset Categories Exceed 95%	Does Not Have More Than 95% In One Asset Catgeory	3	\$199,568
Not Diversified	Not Diversified	100% In a Single Non-Diversified Fund Option	1	\$1,456



TRANSAMERICA®

PARTICIPANT COUNT AND ASSETS BY FUND

Participant Count And Assets by Fund					
Asset Category	Fund Name	2023 Q4			
		Participants	% of Participants	Assets	% of Assets
Bonds	PIMCO Income Instl	2	33.3%	\$40,637	7.4%
	Standard Stable Asset Fund II	1	16.7%	\$1,456	0.3%
Stocks	JPMorgan Mid Cap Growth R6	1	16.7%	\$90,991	16.5%
	Vanguard Mid-Cap Value Index Admiral	1	16.7%	\$6,085	1.1%
	Vanguard Small Cap Value Index Admiral	1	16.7%	\$6,246	1.1%
	Vanguard Total Intl Stock Index Admiral	1	16.7%	\$6,022	1.1%
Multi-Asset / Other	Vanguard LifeStrategy Cnsrv Gr Inv	1	16.7%	\$3,994	0.7%
	American Funds American Balanced R6	1	16.7%	\$6,018	1.1%
	PIMCO RealPath Blend 2040 Institutional	1	16.7%	\$85,831	15.6%
	PIMCO RealPath Blend Income Institutional	2	33.3%	\$303,683	55.1%

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FUND PERFORMANCE

The investment returns are net of fees.

Fund Performance

Asset Category	Fund Name	Participant Count	Assets	3 Month	YTD	1 Year	3 Year	5 Year	10 Year	Life	Net Exp	Revenue Share
Bonds	PIMCO Income Instl	2	\$40,637	5.89	9.32	9.32	1.12	3.40	4.44	6.78	0.62	0.00
Stocks	Vanguard Mid-Cap Value Index Admiral	1	\$6,085	11.51	9.76	9.76	9.18	11.31	8.49	11.84	0.07	0.00
	JPMorgan Mid Cap Growth R6	1	\$90,991	13.21	23.35	23.35	0.00	15.76	11.41	13.89	0.70	0.00
	Vanguard Small Cap Value Index Admiral	1	\$6,246	13.63	15.99	15.99	10.45	11.85	8.49	12.05	0.07	0.00
	Vanguard Total Intl Stock Index Admiral	1	\$6,022	9.93	15.48	15.48	1.76	7.33	4.09	4.86	0.11	0.00
Multi-Asset / Other	American Funds American Balanced R6	1	\$6,018	9.96	14.37	14.37	5.40	9.26	7.88	10.44	0.25	0.00
	PIMCO RealPath Blend Income Institutional	2	\$303,683	8.47	10.87	10.87	0.46	6.12	0.00	4.93	0.51	0.00
	PIMCO RealPath Blend 2040 Institutional	1	\$85,831	10.16	17.25	17.25	4.24	9.78	0.00	7.20	0.26	0.00
	Vanguard LifeStrategy Cnsrv Gr Inv	1	\$3,994	8.43	12.48	12.48	0.46	5.52	4.77	6.41	0.12	0.00

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PLAN FINANCIAL SUMMARY BY FUND

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Plan Financials By Fund

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Closing Balance
Grand Total	\$522,688	\$88	\$16,667	\$0	\$0	\$7,305	\$40,107	\$0	\$0	\$0	\$0	\$0	\$0	(\$34,750)	(\$1,142)	\$550,962
American Funds American Balanced R6	\$2,808	\$0	\$2,740	\$0	\$0	\$90	\$390	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$9)	\$6,018
Vanguard Mid-Cap Value Index Admiral	\$2,755	\$0	\$2,740	\$0	\$0	\$47	\$552	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$9)	\$6,085
Vanguard LifeStrategy Cnsvr Gr Inv	\$4,352	\$88	\$0	\$0	\$0	\$50	\$181	\$0	\$0	\$0	\$0	\$0	\$0	(\$669)	(\$9)	\$3,994
Vanguard Small Cap Value Index Admiral	\$2,772	\$0	\$2,740	\$0	\$0	\$40	\$703	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$9)	\$6,246
Vanguard Total Intl Stock Index Admiral	\$2,779	\$0	\$2,740	\$0	\$0	\$86	\$426	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$9)	\$6,022
JPMorgan Mid Cap Growth R6	\$80,550	\$0	\$0	\$0	\$0	\$0	\$10,620	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$179)	\$90,991
PIMCO RealPath Blend Income Institutional	\$308,182	\$0	\$0	\$0	\$0	\$5,038	\$19,164	\$0	\$0	\$0	\$0	\$0	\$0	(\$28,041)	(\$659)	\$303,683
PIMCO RealPath Blend 2040 Institutional	\$72,595	\$0	\$5,707	\$0	\$0	\$1,289	\$6,405	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$166)	\$85,831
Standard Stable Asset Fund II	\$1,448	\$0	\$0	\$0	\$0	\$0	\$11	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$3)	\$1,456
PIMCO Income Instl	\$44,447	\$0	\$0	\$0	\$0	\$664	\$1,656	\$0	\$0	\$0	\$0	\$0	\$0	(\$6,040)	(\$90)	\$40,637

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Plan Financials By Source

Name	Opening Balance	Capital Gains	Contributions	Conversions	Forfeited Amount	Dividends	Change In Value	Misc. Other	Net Transfer	Transfer In	Transfer Out	Loans	Loan Repayments	Withdrawals	Fees And Expenses	Participant Count	Closing Balance
Grand Total	\$522,688	\$88	\$16,667	\$0	\$0	\$7,305	\$40,107	\$0	\$0	\$0	\$0	\$0	\$0	(\$34,750)	(\$1,142)		\$550,962
Deferred Compensation	\$381,615	\$0	\$10,960	\$0	\$0	\$4,945	\$29,741	\$0	\$0	\$0	\$0	\$0	\$0	(\$26,835)	(\$835)	4	\$399,591
Employer	\$141,073	\$88	\$5,707	\$0	\$0	\$2,359	\$10,366	\$0	\$0	\$0	\$0	\$0	\$0	(\$7,916)	(\$307)	3	\$151,371

Plan level data is for informational purposes only. This information is intended for Plan Sponsor, Third Party Administrator and Financial Advisor use only and is not intended to constitute advice concerning plan provisions, plan investments, or plan operation and compliance.





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- II. FIDUCIARY EDUCATION
- III. MARKET REVIEW
- IV. SCORECARD & METHODOLOGY
- V. SUMMARY
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Service Plan 2024

Service	Target Month	Month Delivered
Investment Review	February July April October	February 5 - - -
Scorecard	February July April October	February 5 - - -
Annual Fee Benchmarking	Monthly	Monthly
Live-Bid RFP	Monthly	Monthly
Cash-Equivalent Review	February	July 7, 2025
Fee Structure Review	Ongoing	Ongoing
Fiduciary Education and Best Practices	February July April October	February 5 - - -
Employee Education Sessions	Ongoing	Ongoing
Participant Helpline	Ongoing	Ongoing

Service	Target Month	Month Delivered
Newsletters and Memos	Monthly	Monthly
Employee Communication	Monthly	Monthly
Plan Design Analysis	February	February 3, 2025

Fiduciary Fitness Program™

Module 8: Maintaining Your Fiduciary File

Why is it important to maintain an organized file?

- It is a fiduciary best practice;
- Makes it easy to locate pertinent plan information;
- Ensures plan documentation is accounted for;
- Helps with the termination or addition of plan fiduciaries; and
- Saves time, resources and money during Internal Revenue Service (IRS) or Department of Labor (DOL) audits.

Regulatory Audits

- Regulatory audits require plan sponsors to submit pertinent, detailed plan information for review
- Examples of what is reviewed include:
 - Plan documents, trust agreements
 - Investment policy statement and related investment decision documentation
 - Names of all fiduciaries, trustees, consultants, plan administrators and parties in interest
 - Complete plan correspondence file

Module 8: Maintaining Your Fiduciary File

Plan-Focused Documents

- Plan documents and amendments (signed and dated)
- Trust agreement
- Summary plan description and any material modifications
- 404(c) policy statement and notice
- Form 5500 “Annual Return/Report of Employee Benefit Plan” and audited financial statements (if applicable)
- Form 8955-SSA “Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits”
- Determination letter applications (Form 5300) (if necessary)
- Plan loan documents
- Summary annual reports
- IRS opinion or determination letters
- Fidelity bond

Plan-Focused Documents

- Any fiduciary documents related to the plan, board of directors, committees and fiduciary functions
 - Corporate board resolutions
 - Fiduciary roles and responsibilities, including signed acceptances
 - Committee charter
 - Investment policy statement
 - Meeting minutes
 - Fiduciary liability insurance policies and/or riders

Module 8: Maintaining Your Fiduciary File

Provider-Focused Documents

- All documents relating to consultants, service providers and auditors, including:
 - Service provider contracts
 - Advisory, consulting or engagement agreements
 - RFP/provider analysis reports
 - ADV II and Schedule F (if required)
 - 408(b)(2) fee disclosures

Administrative Documents

- The following are some examples of administrative documents recommended to be readily available:
 - Evidence of employer contributions (bank statements, trust statements)
 - Distribution documents
 - Audit results (IRS, DOL)
 - Complaints, claims and appeals documentation

Participant Communications

- Section 404a-5 Participant Fee Disclosure
- QDIA notices
- Safe harbor notice
- Automatic enrollment notices (ACA, EACA, QACA)
- Enrollment materials
- Event communications (meetings, emails, postings, etc.)
- Requests from participants

Module 8: Maintaining Your Fiduciary File

Investment Selection and Monitoring

- Maintain pertinent investment materials associated with plan management:
 - Documentation of investment activity (trust statements)
 - Meeting minutes
 - Investment lineup and expenses
 - Investment policy statement
 - Copies of Fiduciary Investment Review books, including Scorecards

Fiduciary Briefcase™ (Sponsor Portal)

- What is it?
 - Online client filing system
 - Plan sponsors have their own unique login to the website in which the consultant will upload any pertinent documentation for the plan
 - Login information printed on each Executive Summary
- Benefits:
 - Creates, maintains and organizes client retirement file
 - Gives plan fiduciaries complete access to documents at the click of a button



ACTION STEP

- **Complete Documentation Module “Organizing Your Fiduciary File”**
- **Confirm Fiduciary Briefcase log-in credentials**

ACR#4376824 02/22

Q1 Fiduciary Legal Briefing

IRS releases guidance on prohibited Pension-Linked Emergency Savings Account anti-abuse rules

SECURE 2.0 PLESA Law Breakdown

SECURE 2.0 created the opportunity for sponsors to include a “pension-linked emergency savings account” (PLESA) in a DC plan. As IRS describes them: “PLESAs are short-term savings accounts established and maintained in connection with a defined contribution plan and are treated as a type of designated Roth account.” Highly compensated employees may not make PLESA contributions. PLESAs are generally subject to a \$2,500 account cap. but the plan may set a lower cap.

PLESA contributions must receive the same matching contributions that regular contributions do; (annual) matching contributions on account of PLESA contributions may not, however, exceed the account cap (\$2,500 or, if the employer elects, a lower amount).

Participants must, however, be able to withdraw amounts in a PLESA at least once a month. With respect to withdrawals, the statute provides that “for purposes of any applicable limitation on matching contributions, any matching contributions made under the plan are treated first as attributable to the elective deferrals of the participant other than contributions to a PLESA.”

ACR# 6258481 01/24

Q1 Fiduciary Legal Briefing

IRS releases guidance on prohibited Pension-Linked Emergency Savings Account anti-abuse rules

The Issue

The possible participant abuse of PLESA rules with which IRS believes sponsors may be concerned is “that a participant could ... contribute to [a] PLESA and take distributions in a way that maximizes matching contributions received but maintains little to no contributions in the PLESA.” For instance, a participant might manage to “buy” \$2,500 in matching contributions using only PLESA contributions, then withdraw all those PLESA contributions during the year while still keeping the related matching contributions, thus effectively getting a \$2,500 match with no long-term saving.

In this regard, the statute provides that a plan “may employ reasonable procedures to limit the frequency or amount of matching contributions with respect to contributions to [a PLESA], solely to the extent necessary to prevent manipulation of the rules of the plan to cause matching contributions to exceed the intended amounts or frequency.”

ACR# 6258481 01/24

Q1 Fiduciary Legal Briefing

IRS releases guidance on prohibited Pension-Linked Emergency Savings Account anti-abuse rules

Proactive Provisions

With respect to possible plan anti-abuse measures, Notice 2024-22 states that the following would not be permitted:

- Forfeiture of matching contributions: A plan may not provide that matching contributions already made on account of participant contributions to the PLESA will be forfeited by reason of a participant's withdrawal from a PLESA;
- Suspension of participant contributions to PLESA: A plan may not suspend a participant's ability to contribute to the participant's PLESA on account of a withdrawal from the PLESA; and
- Suspension of matching contributions on participant contributions to the underlying defined contribution plan: A plan may not suspend matching contributions made on account of participant elective deferrals to the underlying defined contribution plan.
- Thus (under Notice 2024-22) rules limiting the ability of participants to game the PLESA system will generally have to focus on restricting the frequency and amount of PLESA contributions, not on penalizing "abuse."

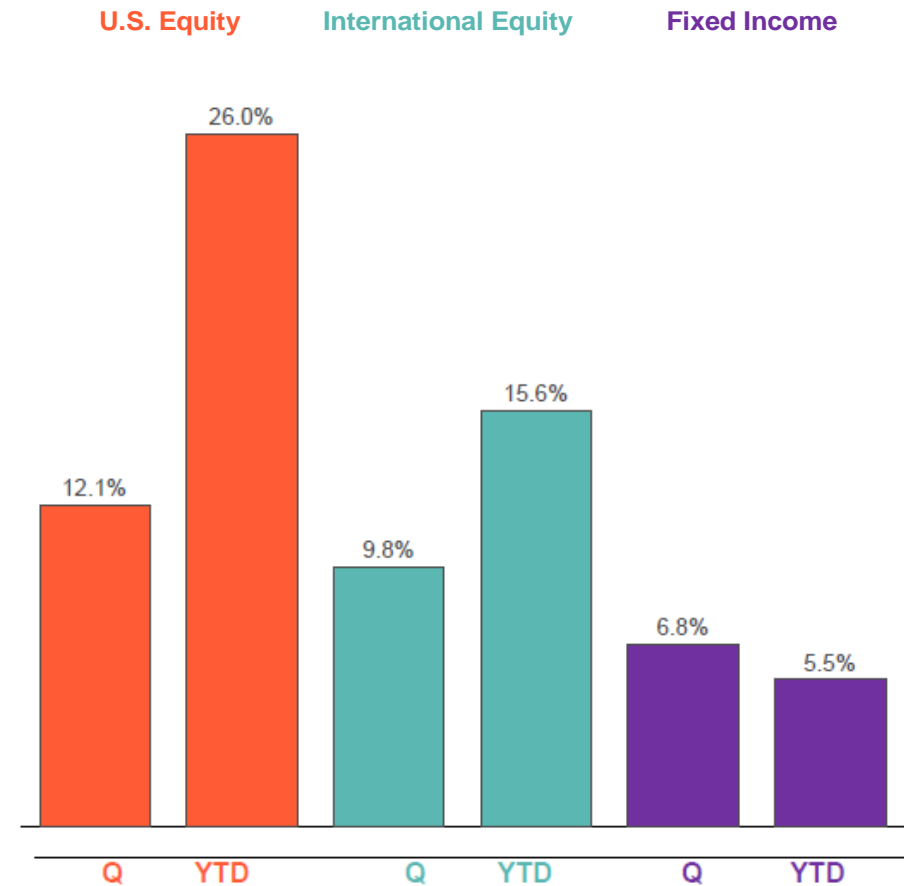
ACR# 6258481 01/24

Q4 2023 Market Review

SUMMARY

- Equity and Fixed Income markets experienced very strong positive fourth quarter performance.
- U.S. Equity rose 12.1% (Russell 3000), with large cap tech stocks leading the way. For the year, large cap growth has outperformed large cap value by over 3100 basis points (42.7% vs. 11.5%).
- International equities rose to a lesser extent over the quarter, posting a 9.8% gain (MSCI ACWI ex U.S.).
- The broad U.S. fixed income market was also up, returning 6.8% (Bloomberg Barclays Aggregate) over the quarter.
- While the Fed likely finished raising rates, there was no indication of a rate cut, which is what market participants anticipate in 2024. This is dependent on the inflationary outlook and health of the economy, which the Fed has been closely monitoring.
- The U.S. labor market remained tight during the quarter with unemployment at 3.7% in December.

TRAILING RETURNS (12/31/2023)



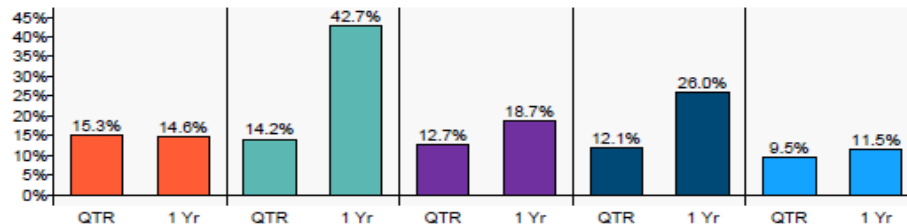
Quarterly and year-to-date returns of the following indices: U.S. Equity (Russell 3000 Index), Fixed Income (Bloomberg Barclays U.S. Aggregate Bond Index) and International Equity (MSCI ACWI ex U.S. Index)

Q4 2023 Market Review – U.S. Equity

U.S. EQUITY

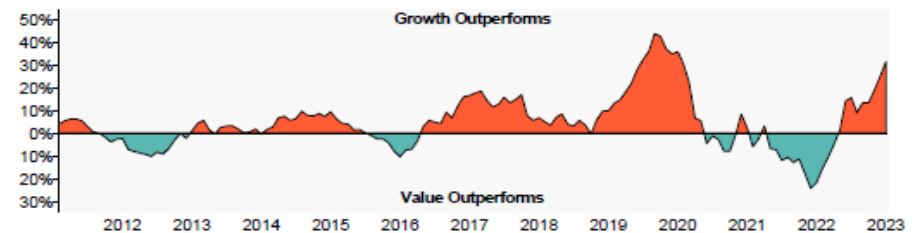
- The broad U.S. equity market, as measured by the Russell 3000 Index, was up 12.1% for the quarter.
- The best performing U.S. equity index for the quarter was Russell 2000 Value, returning a positive 15.3%.
- The worst performing U.S. equity index for the quarter was Russell 1000 Value, returning a positive 9.5%.

INDEX PERFORMANCE (sorted by trailing quarterly performance)



	QTR	YTD	1 Yr	3 Yr	5 Yr	10 Yr
Russell 2000 Value	15.3	14.6	14.6	7.9	10.0	6.8
Russell 1000 Growth	14.2	42.7	42.7	8.9	19.5	14.9
Russell 2000 Growth	12.7	18.7	18.7	-3.5	9.2	7.2
Russell 3000	12.1	26.0	26.0	8.5	15.2	11.5
Russell 1000 Value	9.5	11.5	11.5	8.9	10.9	8.4

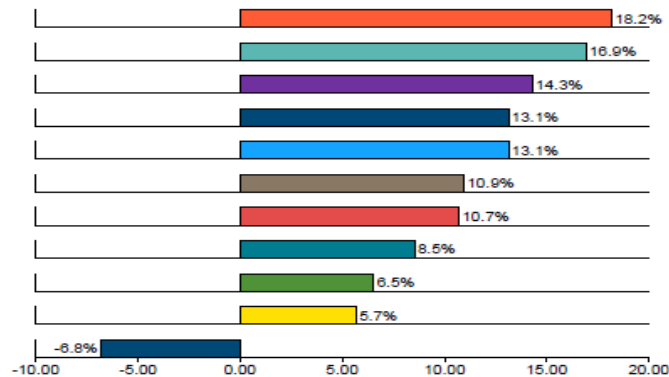
GROWTH VS. VALUE



Over the last year, growth stocks outperformed value stocks by 31.20%. For the trailing quarter, growth stocks outperformed value stocks by 4.70%.

The graph above is plotted using a rolling one-year time period. Growth stock performance is represented by the Russell 1000 Growth Index. Value stock performance is represented by the Russell 1000 Value Index.

SECTOR (sorted by trailing quarterly performance)



	QTR	YTD	1 Yr	3 Yr	5 Yr	10 Yr
Real Estate	18.2	11.5	11.5	5.6	7.6	8.2
Information Technology	16.9	56.5	56.5	14.7	26.5	20.3
Financials	14.3	11.7	11.7	10.5	11.7	10.0
Consumer Discretionary	13.1	40.6	40.6	4.2	13.9	11.3
Industrials	13.1	20.4	20.4	11.2	14.8	10.3
Telecommunication Svcs.	10.9	54.3	54.3	4.1	13.0	7.7
Materials	10.7	13.5	13.5	8.9	13.8	8.7
Utilities	8.5	-7.5	-7.5	3.4	6.5	8.7
Health Care	6.5	1.9	1.9	7.2	11.2	11.3
Consumer Staples	5.7	1.3	1.3	6.0	10.9	8.6
Energy	-6.8	-0.6	-0.6	36.2	13.0	2.7

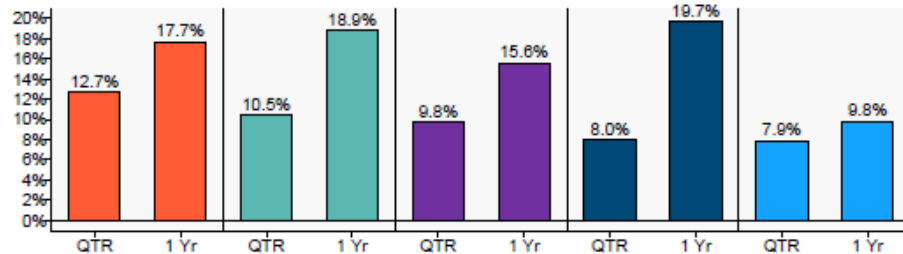
Source: S&P 1500 Sector Indices

Q4 2023 Market Review – International Equity

INTERNATIONAL EQUITY

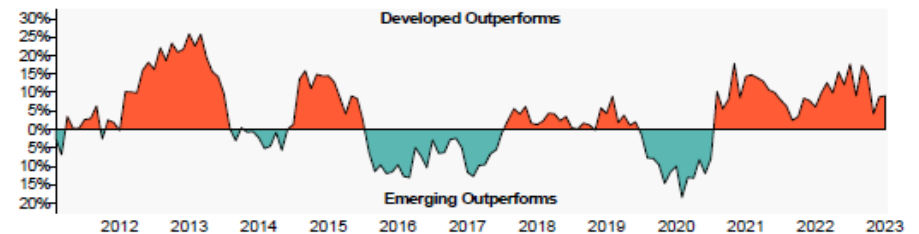
- Developed international equity returned a positive 10.5% in the last quarter (MSCI EAFE).
- Emerging market equity posted a positive 7.9% return (MSCI Emerging Markets Index).

INDEX PERFORMANCE (sorted by trailing quarterly performance)



	QTR	YTD	1 Yr	3 Yr	5 Yr	10 Yr
MSCI EAFE Large Growth	12.7	17.7	17.7	1.3	9.6	5.5
MSCI EAFE	10.5	18.9	18.9	4.5	8.7	4.8
MSCI ACWI ex US	9.8	15.6	15.6	1.5	7.1	3.8
MSCI EAFE Large Value	8.0	19.7	19.7	8.8	7.6	3.1
MSCI Emg Markets	7.9	9.8	9.8	-5.1	3.7	2.7

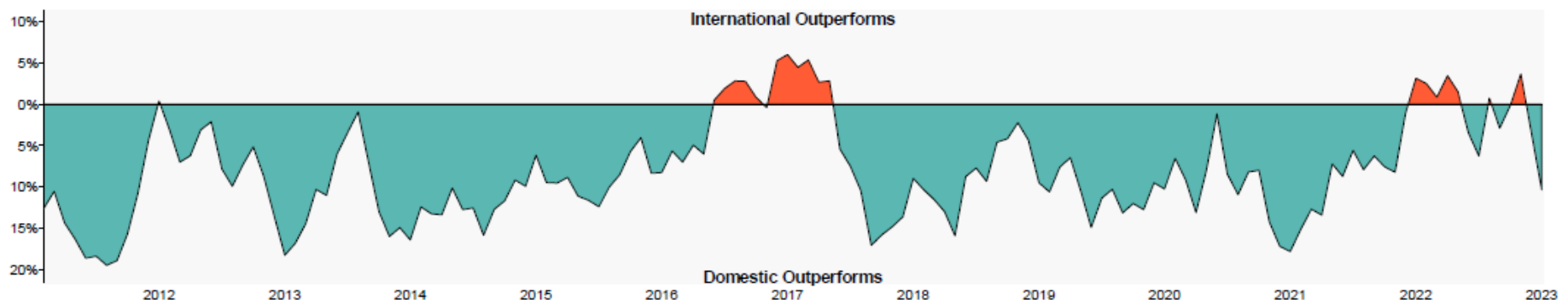
DEVELOPED VS. EMERGING MARKETS



Over the last year, developed international stocks outperformed emerging market stocks by 9.10%.
For the trailing quarter, developed international stocks outperformed emerging market stocks by 2.60%.

The graph above is plotted using a rolling one-year time period. Developed international stock performance is represented by the MSCI EAFE Index. Emerging market stock performance is represented by the MSCI Emerging Markets Index.

INTERNATIONAL VS. DOMESTIC



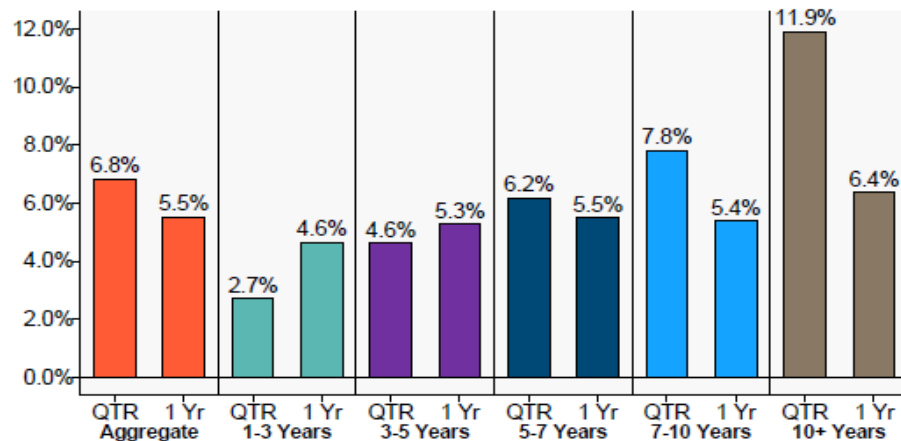
The graph above is plotted using a rolling one-year time period. International stock performance is represented by the MSCI ACWI ex U.S. Index. Domestic stock performance is represented by the Russell 3000 Index.

Q4 2023 Market Review – Fixed Income

FIXED INCOME

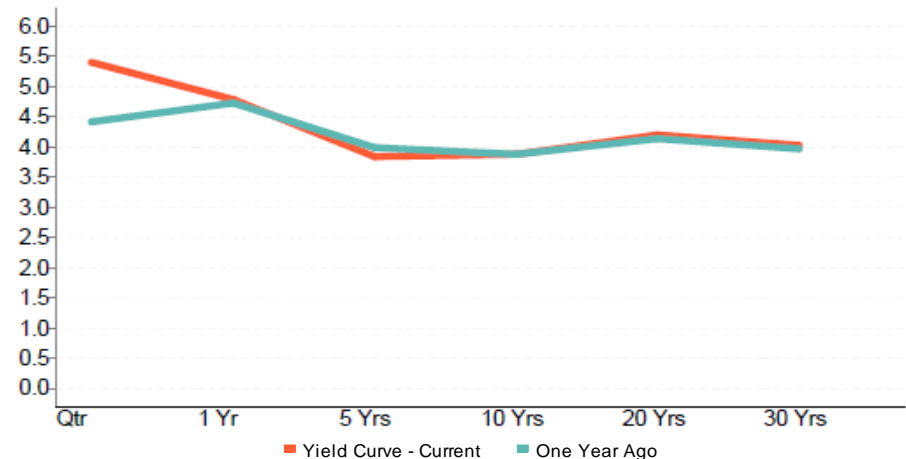
- The broad U.S. fixed income market returned a positive 6.8% (Bloomberg Barclays U.S. Aggregate) for the quarter.
- The best performing sector for the quarter was Corporate Investment Grade, returning a positive 8.5%.
- The worst performing sector for the quarter was Cash, returning a positive 1.4%.

PERFORMANCE BY MATURITY

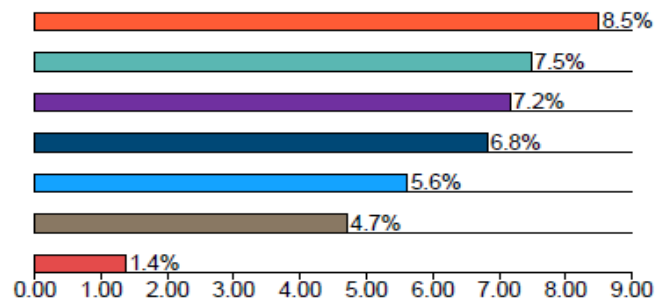


Source: Bloomberg Barclays U.S. Aggregate Indices

YIELD CURVE



SECTOR (sorted by trailing quarterly performance)



	QTR	YTD	1 Yr	3 Yr	5 Yr	10 Yr
Corporate Investment Grade	8.5	8.5	8.5	-3.3	2.6	3.0
Mortgage Backed Securities	7.5	5.0	5.0	-2.9	0.3	1.4
High Yield Corporate Bond	7.2	13.4	13.4	2.0	5.4	4.6
Aggregate Bond	6.8	5.5	5.5	-3.3	1.1	1.8
Government	5.6	4.1	4.1	-3.7	0.6	1.3
TIPS	4.7	3.9	3.9	-1.0	3.2	2.4
Cash	1.4	5.0	5.0	2.2	1.9	1.3

Source: Bloomberg Barclays U.S. Indices

Q4 2023 Market Kaleidoscope

ASSET CLASS RETURNS

The following chart exhibits the volatility of asset class returns from year to year by ranking indices in order of performance, highlighting the importance of diversification.

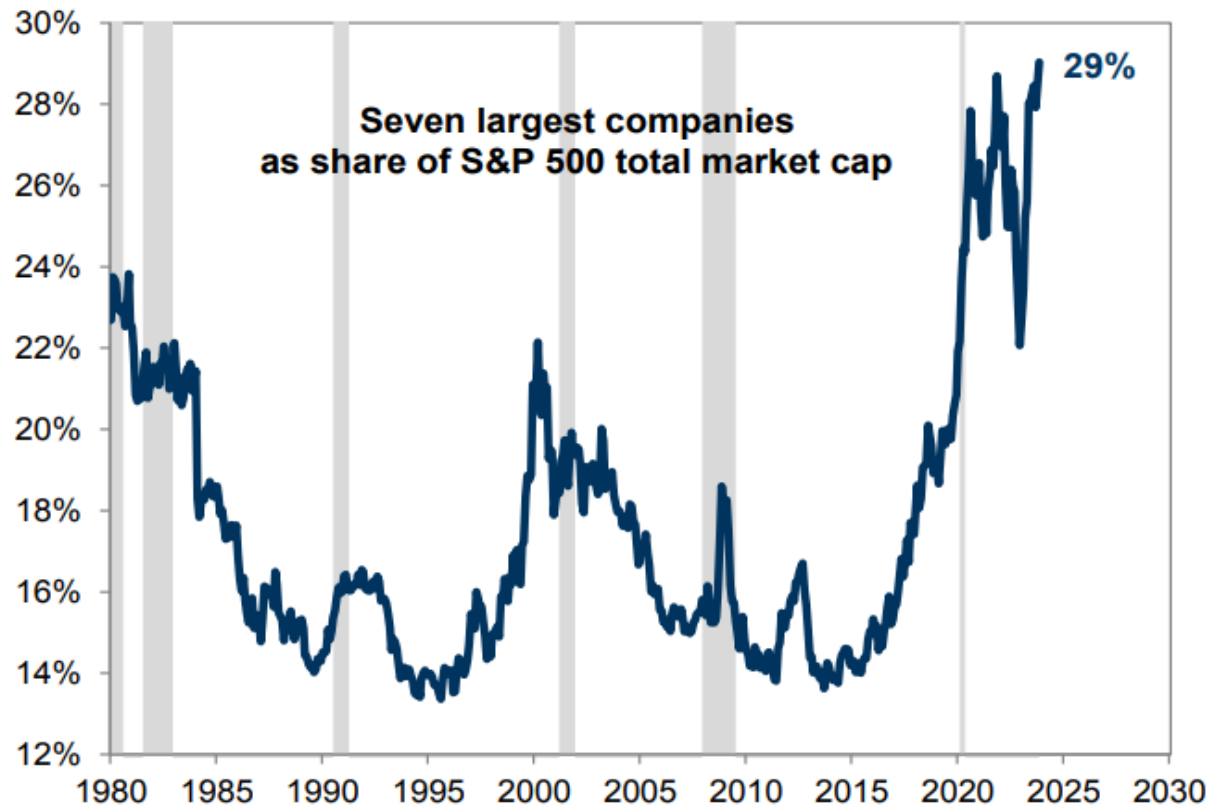
2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Sm Growth 43.30	Global REIT 22.81	Large Growth 5.67	Sm Value 31.74	Large Growth 30.21	Cash 1.87	Large Growth 36.39	Large Growth 38.49	Global REIT 32.50	Commodities 16.09	Large Growth 42.68
Sm Value 34.52	Large Value 13.45	Global REIT 0.59	Large Value 17.34	International 27.19	Fixed Income 0.01	Sm Growth 28.48	Sm Growth 34.63	Sm Value 28.27	Cash 1.46	Sm Growth 18.66
Large Growth 33.48	Large Growth 13.05	Fixed Income 0.55	Commodities 11.77	Sm Growth 22.17	Large Growth -1.51	Large Value 26.54	Balanced 14.24	Large Growth 27.60	Large Value -7.54	International 15.62
Large Value 32.53	Balanced 6.58	Cash 0.05	Sm Growth 11.32	Balanced 14.95	Balanced -4.77	Global REIT 24.49	International 10.65	Commodities 27.11	Fixed Income -13.01	Balanced 15.52
International 15.29	Fixed Income 5.97	Balanced -0.49	Balanced 7.18	Large Value 13.66	Global REIT -4.77	Sm Value 22.39	Fixed Income 7.51	Large Value 25.16	Sm Value -14.48	Sm Value 14.65
Balanced 14.78	Sm Growth 5.60	Sm Growth -1.38	Large Growth 7.08	Global REIT 8.63	Large Value -8.27	International 21.51	Sm Value 4.63	Balanced 10.75	Balanced -15.80	Global REIT 11.53
Global REIT 2.81	Sm Value 4.22	Large Value -3.83	Global REIT 6.90	Sm Value 7.84	Sm Growth -9.31	Balanced 20.11	Large Value 2.80	International 7.82	International -16.00	Large Value 11.46
Cash 0.07	Cash 0.03	International -5.66	International 4.50	Fixed Income 3.54	Commodities -11.25	Fixed Income 8.72	Cash 0.67	Sm Growth 2.83	Global REIT -23.60	Fixed Income 5.53
Fixed Income -2.02	International -3.87	Sm Value -7.47	Fixed Income 2.65	Commodities 1.70	Sm Value -12.86	Commodities 7.69	Commodities -3.12	Cash 0.05	Sm Growth -26.36	Cash 5.01
Commodities -9.52	Commodities -17.01	Commodities -24.66	Cash 0.33	Cash 0.86	International -14.20	Cash 2.28	Global REIT -8.11	Fixed Income -1.54	Large Growth -29.14	Commodities -7.91

Large Value (Russell 1000 Value)	Small Growth (Russell 2000 Growth)	Global REIT (S&P Global REIT)
Large Growth (Russell 1000 Growth)	International (MSCI ACWI ex-US)	Commodities (Bloomberg Commodities)
Small Value (Russell 2000 Value)	Fixed Income (Bloomberg Barclays Agg)	Cash (Merrill Lynch 3-Mo T-Bill)
Balanced (40% Russell 3000, 40% Bloomberg Barclay's U.S. Aggregate, 20% MSCI ACWI ex US)		

Q4 2023 Market Review Chart of the Quarter

The Magnificent Seven

The Magnificent Seven (Apple, Amazon, Alphabet, Microsoft, Meta, NVIDIA, and Tesla) were responsible for the lion's share of the U.S. equity market's performance in 2023. This group of stocks now represents approximately 1/3 of the S&P 500 Index. With the market narrowing around these names, they will exert much greater influence on the market's performance in 2024, as market-cap weighted indices like the S&P 500 are starting the year much less diversified than they have in the past.



Source: Compustat, Goldman Sachs Global Investment Research.

Q4 2023 Disclosures

Performance of indexes reflects the unmanaged result for the market segment the selected stocks represent. Indexes are unmanaged and not available for direct investment.

Citigroup Corporate Bond is an index which serves as a benchmark for corporate bond performance. You cannot invest directly in an index.

Citigroup Mortgage Master is an index which serves as a benchmark for U.S. mortgage-backed securities performance.

Citigroup WGBI Index is an index which serves as a benchmark for global bond performance, including 22 different government bond markets.

Credit Suisse High Yield Index is an unmanaged, trader priced index constructed to mirror the characteristics of the high yield bond market.

BC (Barclays Capital) U.S. Aggregate Bond Index represents securities that are U.S., domestic, taxable, and dollar dominated. The index covers the U.S. investment grade fixed rate bond market, with index components for government and corporate securities, mortgage pass-through securities, and asset-backed securities. These major sectors are subdivided into more specific indices that are calculated and reported on a regular basis.

BC Credit Bond Index includes publicly issued U.S. corporate and specified foreign debentures and secured notes that meet the specified maturity, liquidity, and quality requirements. To qualify, bonds must be SEC-registered.

BC U.S. Corporate Investment Grade represents investment grade corporate securities that are U.S., domestic, taxable, and dollar denominated.

BC High Yield Corporate Bond represents below investment grade corporate securities that are U.D., domestic, taxable, and dollar denominated.

BC TIPS Index includes publicly issued U.S. government treasury inflation protected securities that meet the specified maturity, liquidity and other requirements.

BC Mortgage-Backed Securities covers agency mortgage-backed pass-through securities (both fixed-rate and hybrid ARMs) issued by Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC).

BC Muni Bond covers the USD-denominated long-term tax-exempt bond market with four main sectors: state and local general obligation bonds, revenue bonds, insured bonds, and pre-refunded bonds.

BC Government Index includes publicly issued U.S. government securities that meet the specified maturity, liquidity and other requirements.

BarCap U.S. Aggregate 1-3 Yr. TR USD Index represents securities in the BC U.S. Aggregate Index that have maturity dates over the next 1-3 years.

BarCap U.S. Aggregate 3-5 Yr. TR USD Index represents securities in the BC U.S. Aggregate Index that have maturity dates over the next 3-5 years.

BarCap U.S. Aggregate 5-7 Yr. TR USD Index represents securities in the BC U.S. Aggregate Index that have maturity dates over the next 5-7 years.

BarCap U.S. Aggregate 7-10 Yr. TR USD Index represents securities in the BC U.S. Aggregate Index that have maturity dates over the next 7-10 years.

BarCap U.S. Aggregate 10+ Yr. TR USD Index represents securities in the BC U.S. Aggregate Index that have maturity dates over 10 years.

DJW 5000 (Full Cap) Index measures the performance of all U.S. common equity securities, and serves as an index of all stock trades in the U.S.

MSCI FI Emerging Markets is a rules-based index which serves as a benchmark for emerging country fixed income performance.

MSCI FI EAFE International is a rules-based index which serves as a benchmark for developed international country fixed income performance.

MSCI EAFE Index is listed for foreign stock funds (EAFE refers to Europe, Australia and Far East). Widely accepted as a benchmark for international stock performance, it is an aggregate of 21 individual country indexes.

MSCI EAFE Large Value represents the large cap value stocks within the MSCI EAFE Index.

MSCI EAFE Large Growth represents the large cap growth stocks within the MSCI EAFE Index.

MSCI EAFE Mid Value represents the mid cap value stocks within the MSCI EAFE Index.

MSCI EAFE Mid Growth represents the mid cap growth stocks within the MSCI EAFE Index.

MSCI EAFE Small Value represents the small cap value stocks within the MSCI EAFE Index.

MSCI EAFE Small Growth represents the small cap growth stocks within the MSCI EAFE Index.

MSCI EM (Emerging Markets) Index serves as a benchmark for each emerging country. The average size of these companies is (U.S.) \$400 million, as compared with \$300 billion for those companies in the World index.

MSCI World Index is a rules-based index that serves as a benchmark for the developed global equity markets.

MSCI Europe ex UK Index is a rules-based index that serves as a benchmark for Europe's equity markets, excluding the United Kingdom.

MSCI Pacific ex Japan Index is a rules-based index that serves as a benchmark for Asia Pacific's equity markets, excluding Japan.

MSCI United Kingdom Index is a rules-based index that serves as a benchmark for the United Kingdom's equity markets.

MSCI Japan is a rules-based index that serves as a benchmark for Japan's equity markets.

NAREIT All REIT Index includes all tax-qualified REITs with common shares that trade on the New York Stock Exchange the American Stock Exchange or the NASDAQ National Market List.

3-Month T-Bills (90 Day T-Bill Index) are government-backed, short-term investments considered to be risk-free and as good as cash because the maturity is only three months.

Russell 1000 Growth Index is a market-capitalization weighted index of those firms in the Russell 1000 with higher price-to-book ratios and higher forecasted growth values.

Russell 1000 Value Index is a market-capitalization weighted index of those firms in the Russell 1000 with lower price-to-book ratios and lower forecasted growth values.

Russell Top 200 Growth Index is a market-capitalization weighted index of those firms in the Russell Top 200 with higher price-to-book ratios and higher forecasted growth values.

Russell Top 200 Value Index is a market-capitalization weighted index of those firms in the Russell Top 200 with lower price-to-book ratios and lower forecasted growth values.

Russell 2000 Growth Index is a market-weighted total return index that measures the performance of companies within the Russell 2000 Index having higher price-to-book ratio and higher forecasted growth values.

Russell 2000 Index consists of the smallest 2000 companies in the Russell 3000 Index, representing approximately 7% of the Russell 3000 total market capitalization.

Russell 2000 Value Index is a market-weighted total return index that measures the performance of companies within the Russell 2000 Index having lower price-to-book ratio and lower forecasted growth values.

Q4 2023 Disclosures

Russell MidCap Growth Index is a market-weighted total return index that measures the performance of companies within the Russell MidCap Index having higher price-to-book ratio and higher forecasted growth values.

Russell MidCap Index includes firms 201 through 1000, based on market capitalization, from the Russell 3000 Index.

Russell MidCap Value Index is a market-weighted total return index that measures the performance of companies within the Russell MidCap Index having lower price-to-book ratio and lower forecasted growth values.

Russell Top 200 Index consists of the 200 largest securities in the Russell 3000 Index. Russell 3000 Index is a market capitalization weighted index, consisting of 3,000 U.S. common equity securities, reflective of the broad U.S. equity market.

Salomon 1-10 Yr. Governments is an index which serves as a benchmark for U.S. Government bonds with maturities ranging from 1 to 10 years.

S&P 500 Index measures the performance of the largest 500 U.S. common equity securities, and serves as an index of large cap stocks traded in the U.S.

S&P 1500 Energy Index measures the performance of the energy sector in the S&P 1500 Index.

S&P 1500 Industrials measures the performance of the industrial sector in the S&P 1500 Index.

S&P 1500 Financials measures the performance of the financials sector in the S&P 1500 Index.

S&P 1500 Utilities measures the performance of the utilities sector in the S&P 1500 Index.

S&P 1500 Consumer Discretionary Index measures the performance of the consumer discretionary sector in the S&P 1500 Index.

S&P 1500 Consumer Staples Index measures the performance of the consumer staples sector in the S&P 1500 Index.

S&P 1500 Information Technology measures the performance of the information technology sector in the S&P 1500 Index.

S&P 1500 Materials measures the performance of the materials sector in the S&P 1500 Index.

S&P 1500 Health Care measures the performance of the health care sector in the S&P 1500 Index.

S&P 1500 Telecommunications Services Index measures the performance of the telecommunications services sector in the S&P 1500 Index.

General Disclosure

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ACR# 6216389 01/24

Scorecard System Methodology

The Scorecard System Methodology incorporates both quantitative and qualitative factors in evaluating fund managers and their investment strategies. The Scorecard System is built around pass/fail criteria, on a scale of 0 to 10 (with 10 being the best) and has the ability to measure active, passive and asset allocation investing strategies. Active and asset allocation strategies are evaluated over a five-year time period, and passive strategies are evaluated over a three-year time period.

Eighty percent of the fund's score is quantitative (made up of eight unique factors), incorporating modern portfolio theory statistics, quadratic optimization analysis, and peer group rankings (among a few of the quantitative factors). The other 20 percent of the score is qualitative, taking into account things such as manager tenure, the fund's expense ratio relative to the average fund expense ratio in that asset class category, and the fund's strength of statistics (statistical significance). Other criteria that may be considered in the qualitative score includes the viability of the firm managing the assets, management or personnel issues at the firm, and/or whether there has been a change in direction of the fund's stated investment strategy. The following pages detail the specific factors for each type of investing strategies.

Combined, these factors are a way of measuring the relative performance, characteristics, behavior and overall appropriateness of a fund for inclusion into a plan as an investment option. General fund guidelines are shown in the "Scorecard Point System" table below. The Scorecard Point System is meant to be used in conjunction with our sample Investment Policy Statement, in order to help identify what strategies need to be discussed as a "watchlist" or review candidate; what strategies continue to meet some minimum standards and continue to be appropriate; and/or identify new top-ranked strategies for inclusion into a plan.

<i>Scorecard Point System</i>	
Acceptable:	7-10 Points
Watchlist¹:	5-6 Points
Review²:	0-4 Points

1 Funds that receive a watchlist score four consecutive quarters or five of the last eight quarters should be placed under review status.

2 Review status necessitates documenting why the fund/strategy remains appropriate or documenting the course of action for removal as an investment option.

Scorecard System Methodology

Target Date Fund Strategies

Target Date Fund strategies are investment strategies that invest in a broad array of asset classes that may include U.S. equity, international equity, emerging markets, real estate, fixed income, high yield bonds and cash (to name a few asset classes). These strategies are managed to a retirement date or life expectancy date, typically growing more conservative as that date is approached). For this type of investment strategy, the Scorecard System is focused on how well these managers can add value from asset allocation. Asset allocation is measured using our Asset allocation strategies methodology and manager selection is measured using either our Active and/or Passive strategies methodologies, depending on the underlying fund options utilized within the Target Date Fund strategy.

Risk-based strategies follow the same evaluation criteria and are evaluated on both their asset allocation and security selection.

Weightings	Target Date Fund Strategies	Maximum Points
Asset Allocation Score (Average) 50%	<p>The individual funds in this Score average require five years of time history to be included. See Asset Allocation strategies methodology for a detailed breakdown of the Scoring criteria. Funds without the required time history are not included in the Score average.</p> <p>The Funds included in this average are from the Conservative, Moderate Conservative, Moderate, Moderate Aggressive and Aggressive categories, where Funds (also referred to as “vintages”) are individually Scored according to their standard deviation or risk bucket.</p>	5
Selection Score (Average) 50%	<p>Active strategies: The individual active funds in this Score average require five years of time history to be Scored. See Active strategies methodology for a detailed breakdown of the Scoring criteria. Funds without the required time history are not included in the Score average.</p> <p>Passive strategies: The individual passive funds in this Score average require three years of time history to be Scored. See Passive strategies methodology for a detailed breakdown of the Scoring criteria. Funds without the required time history are not included in the Score average.</p>	5
	Total	10

Scorecard System Methodology

Asset Allocation Strategies

Asset allocation strategies are investment strategies that invest in a broad array of asset classes that may include U.S. equity, international equity, emerging markets, real estate, fixed income, high yield bonds and cash (to name a few asset classes). These strategies are typically structured in either a risk-based format (the strategies are managed to a level of risk, e.g., conservative or aggressive) or, in an age-based format (these strategies are managed to a retirement date or life expectancy date, typically growing more conservative as that date is approached). For this type of investment strategy, the Scorecard System is focused on how well these managers can add value, with asset allocation being the primary driver of investment returns and the resulting Score. Multisector Bond (MSB) asset class follows the same evaluation criteria with some slightly different tolerance levels where noted. These managers are also evaluated on both their asset allocation and security selection.

Weightings	Asset Allocation Strategies	Maximum Points
Style Factors 30%	Risk Level: The fund's standard deviation is measured against the category it is being analyzed in. The fund passes if it falls within the range for that category.	1
	Style Diversity: Fund passes if it reflects appropriate style diversity (returns-based) among the four major asset classes (Cash, Fixed Income, U.S. & International Equity) for the given category. <i>MSB</i> funds pass if reflect some level of diversity among fixed income asset classes (Cash, U.S. Fixed Income, Non-U.S. Fixed Income and High Yield/Emerging Markets).	1
	R-Squared: Measures the percentage of a fund's returns that are explained by the benchmark. Fund passes with an R-squared greater than 90 percent. This statistic measures whether the benchmark used in the analysis is appropriate.	1
Risk/Return Factors 30%	Risk/Return: Fund passes if its risk is less than the benchmark or its return is greater than the benchmark. Favorable risk/return characteristics are desired.	1
	Up/Down Capture Analysis: Measures the behavior of a fund in up and down markets. Fund passes with an up capture greater than its down capture. This analysis measures the relative value by the manager in up and down markets.	1
	Information Ratio: Measures a fund's relative risk and return. Fund passes if ratio is greater than 0. This statistic measures the value added above the benchmark, adjusted for risk.	1
Peer Group Rankings 20%	Returns Peer Group Ranking: Fund passes if its median rank is above the 50 th percentile.	1
	Sharpe Ratio Peer Group Ranking: Fund passes if its median rank is above the 50 th percentile. This ranking ranks risk-adjusted excess return.	1
Qualitative Factors 20%	Two points may be awarded based on qualitative characteristics of the fund. Primary considerations are given to manager tenure, fund expenses and strength of statistics, however, other significant factors may be considered. It is important to take into account nonquantitative factors, which may impact future performance.	2
Total		10

Scorecard System Methodology

Active Strategies

Active strategies are investment strategies where the fund manager is trying to add value and outperform the market averages (for that style of investing). Typically, these investment strategies have higher associated fees due to the active involvement in the portfolio management process by the fund manager(s). For this type of investment strategy, the Scorecard System is trying to identify those managers who can add value on a consistent basis within their own style of investing.

Weightings	Active Strategies	Maximum Points
Style Factors 30%	Style Analysis: Returns-based analysis to determine the style characteristics of a fund over a period of time. Fund passes if it reflects the appropriate style characteristics. Style analysis helps ensure proper diversification in the Plan.	1
	Style Drift: Returns-based analysis to determine the behavior of the fund/manager over multiple (rolling) time periods. Fund passes if the fund exhibits a consistent style pattern. Style consistency is desired so that funds can be effectively monitored within their designated asset class.	1
	R-Squared: Measures the percentage of a fund's returns that are explained by the benchmark. Fund passes with an R-squared greater than 80 percent. This statistic measures whether the benchmark used in the analysis is appropriate.	1
Risk/Return Factors 30%	Risk/Return: Fund passes if its risk is less than the benchmark or its return is greater than the benchmark. Favorable risk/return characteristics are desired.	1
	Up/Down Capture Analysis: Measures the behavior of a fund in up and down markets. Fund passes with an up capture greater than its down capture. This analysis measures the relative value by the manager in up and down markets.	1
	Information Ratio: Measures a fund's relative risk and return. Fund passes if ratio is greater than 0. This statistic measures the value added above the benchmark, adjusted for risk.	1
Peer Group Rankings 20%	Returns Peer Group Ranking: Fund passes if its median rank is above the 50 th percentile.	1
	Information Ratio Peer Group Ranking: Fund passes if its median rank is above the 50 th percentile. This ranking ranks risk-adjusted excess return.	1
Qualitative Factors 20%	Two points may be awarded based on qualitative characteristics of the fund. Primary considerations are given to manager tenure, fund expenses and strength of statistics, however, other significant factors may be considered. It is important to take into account nonquantitative factors, which may impact future performance.	2
Total		10

Scorecard System Methodology

Passive Strategies

Passive strategies are investment strategies where the fund manager is trying to track or replicate some area of the market. These types of strategies may be broad-based in nature (e.g., the fund manager is trying to track/replicate the entire U.S. equity market like the S&P 500) or may be more specific to a particular area of the market (e.g., the fund manager may be trying to track/replicate the technology sector). These investment strategies typically have lower fees than active investment strategies due to their passive nature of investing and are commonly referred to as index funds. For this type of investment strategy, the Scorecard System is focused on how well these managers track and/or replicate a particular area of the market with an emphasis on how they compare against their peers.

Weightings	Passive Strategies	Maximum Points
Style & Tracking Factors 40%	Style Analysis: Returns-based analysis to determine the style characteristics of a fund over a period of time. Fund passes if it reflects the appropriate style characteristics. Style analysis helps ensure proper diversification in the Plan.	1
	Style Drift: Returns-based analysis to determine the behavior of the fund/manager over multiple (rolling) time periods. Fund passes if the fund exhibits a consistent style pattern. Style consistency is desired so that funds can be effectively monitored within their designated asset class.	1
	R-Squared: Measures the percentage of a fund's returns that are explained by the benchmark. Fund passes with an R-squared greater than 95 percent. This statistic measures whether the benchmark used in the analysis is appropriate.	1
	Tracking Error: Measures the percentage of a fund's excess return volatility relative to the benchmark. Fund passes with a tracking error less than 4. This statistic measures how well the fund tracks the benchmark.	1
Peer Group Rankings 40%	Tracking Error Peer Group Ranking: Fund passes if its median rank is above the 75 th percentile.	1
	Expense Ratio Peer Group Ranking: Fund passes if its median rank is above the 75 th percentile.	1
	Returns Peer Group Ranking: Fund passes if its median rank is above the 75 th percentile.	1
	Sharpe Ratio Peer Group Ranking: Fund passes if its median rank is above the 75 th percentile.	1
Qualitative Factors 20%	Two points may be awarded based on qualitative characteristics of the fund. Primary considerations are given to fund expenses and strength of statistics, however, other significant factors may be considered. It is important to take into account nonquantitative factors, which may impact future performance.	2
Total		10

Scorecard System Methodology

Beyond the Scorecard

The Scorecard System uses an institutional approach which is comprehensive, independent, and utilizes a process and methodology that strives to create successful outcomes for plan sponsors and participants. The Scorecard helps direct the additional research the Investment team conducts with fund managers throughout the year. Three of the primary factors that go into the fund manager research are people, process and philosophy.

PEOPLE	PROCESS	PHILOSOPHY
<p>Key Factors:</p> <ul style="list-style-type: none">• Fund manager and team experience• Deep institutional expertise• Organizational structure• Ability to drive the process and performance	<p>Key Factors:</p> <ul style="list-style-type: none">• Clearly defined• Consistent application• Sound and established• Clearly communicated• Successfully executed process	<p>Key Factors:</p> <ul style="list-style-type: none">• Research and ideas must be coherent and persuasive• Strong rationale• Logical and compelling• Focus on identifying skillful managers

Scorecard Disclosures

Investment objectives and strategies vary among fund, and may not be similar for funds included in the same asset class.

All definitions are typical category representations. The specific share classes or accounts identified above may not be available or chosen by the Plan. Share class and account availability is unique to the client's specific circumstances. There may be multiple share classes or accounts available to the client from which to choose. All recommendations are subject to vendor/provider approval before implementation into the Plan. The performance data quoted may not reflect the deduction of additional fees, if applicable. If reflected, additional fees would reduce the performance quoted.

Performance data is subject to change without prior notice.

Performance of indexes reflects the unmanaged result for the market segment the selected stocks represent. Indexes are unmanaged and not available for direct investment.

The information used in the analysis has been taken from sources deemed to be reliable, including, third-party providers such as Markov Processes International, Morningstar, firms who manage the investments, and/or the retirement plan providers who offer the funds.

Every reasonable effort has been made to ensure completeness and accuracy; however, the final accuracy of the numbers and information is the responsibility of the investment manager(s) of each fund and/or the retirement plan providers offering these funds. Discrepancies between the figures reported in this analysis, and those reported by the actual investment managers and/or retirement plan providers, may be caused by a variety of factors, including: Inaccurate reporting by the manager/provider; Changes in reporting by the manager/provider from the time this report was prepared to a subsequent retro-active audit and corrected reporting; Differences in fees and share-classes impacting net investment return; and, Scriveners error by your advisor in preparing this report.

The enclosed Investment Due Diligence report, including the Scorecard System, is intended for plan sponsor and/or institutional use only. The materials are not intended for participant use.

The purpose of this report is to assist fiduciaries in selecting and monitoring investment options. A fund's score is meant to be used by the Plan sponsor and/or fiduciaries as a tool for selecting the most appropriate fund.

Fund scores will change as the performance of the funds change and as certain factors measured in the qualitative category change (e.g., manager tenure). Fund scores are not expected to change dramatically from each measured period, however, there is no guarantee this will be the case. Scores will change depending on the changes in the underlying pre-specified Scorecard factors.

Neither past performance nor statistics calculated using past performance are guarantees of a fund's future performance. Likewise, a fund's score using the Scorecard System does not guarantee the future performance or style consistency of a fund.

This report was prepared with the belief that this information is relevant to the Plan sponsor as the Plan sponsor makes investment selections.

Fund selection is at the discretion of the investment fiduciaries, which are either the Plan sponsor or the Committee appointed to perform that function.

Cash Equivalents (e.g., money market fund) and some specialty funds are not scored by the Scorecard System.

The enclosed Investment Due Diligence report and Scorecard is not an offer to sell mutual funds. An offer to sell may be made only after the client has received and read the appropriate prospectus.

For the most current month-end performance, please contact your advisor.

The Strategy Review notes section is for informational purposes only. The views expressed here are those of your advisor and do not constitute an offer to sell an investment. An offer to sell may be made only after the client has received and read the appropriate prospectus.

For funds that do not have a score, one of the following will be shown: HIS, SPC, or OTH.

HIS- fund does not have enough performance history to Score.

SPC- fund is in a specialty category that does not Score.

OTH- fund may no longer be active, not in database or available to Score

Carefully consider the investment objectives, risk factors and charges and expenses of the investment company before investing. This and other information can be found in the fund's prospectus, which may be obtained by contacting your Investment Advisor/Consultant or Vendor/Provider. Read the prospectus carefully before investing.

For a copy of the most recent prospectus, please contact your Investment Advisor/Consultant or Vendor/Provider.

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Scorecard™

Total Plan Assets: \$35,466,001.79 as of 12/31/2023

Target Date Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023
PIMCO RealPath Blend Target Date Series Instl	\$31,491,481.87	MA	68	10	7.8	12	8.5	8	9	9	9

Selection (Underlying Funds)

Asset Allocation	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
PIMCO Income Instl	MSB	PIMIX	1	0	1	1	1	1	1	1	2	9	9	9	9
			6.6	47.9/ 52.1	93.3	6.6/ 3.4	106.6/ 97.8	0.42	19	19	- 0.62	MSB	MSB	MSB	MSB

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
PIMCO Total Return Instl	CFI	PTTRX	1	1	1	1	1	1	1	1	2	10	10	10	7
			-22.9/ 26.3	10.0	97.4	6.4/ 1.3	103.9/ 101.4	0.2	35	26	- 0.49	CFI	CFI	CFI	CFI
PIMCO Long-Term Real Return Instl	UGT	PRAIX	0	0	1	0	0	0	0	1	2	4	4	4	5
			-72.3/ 9.1	46.6	88.2	15.7/ 1.6	214.1/ 257.5	-0.16	99	48	- 1.48	UGT	UGT	UGT	UGT
PIMCO Real Return Instl	UGT	PRRIX	1	1	1	1	1	1	1	1	2	10	10	8	7
			-90.1/ 89.6	1.8	98.3	6.4/ 3.3	102.5/ 101.6	0.16	20	14	- 0.67	UGT	UGT	UGT	UGT

Scorecard™

continued

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank		Q4 2023	Q3 2023	Q2 2023	Q1 2023
PIMCO High Yield Instl	HY	PHIYX	1	1	1	1	0	0	1	0	2	7	7	7	7
			92.6/ -95.7	6.5	98.3	9.1/ 4.9	95.5/ 98.7	-0.39	49	57	- 0.57	HY	HY	HY	HY
PIMCO International Bond (USD-Hdg) Instl	GFI	PFORX	1	1	0	1	1	1	1	1	2	9	9	9	9
			-52.2/ 4.4	7.2	69.9	4.7/ 2.0	57.6/ 38.0	0.53	7	10	- 0.63	GFI	GFI	GFI	GFI
PIMCO Emerging Mkts Lcl Ccy and Bd Instl	SFI	PELBX										SPC	SPC	SPC	SPC
											-	-	-	-	-
PIMCO Long-Term US Government Instl	LOG	PGOVX	0	0	1	1	0	0	1	1	2	6	8	7	6
			100.0/ -6.1	62.8	99.6	15.2/ -1.3	99.4/ 99.7	-0.05	32	31	- 1.05	LOG	LOG	LOG	LOG

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard Institutional Index I	LCB-P	VINIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			2.1/ 99.0	2.3	99.7	0.9	42.0	12.0	9	9	- 0.04	LCB-P	LCB-P	LCB-P	LCB-P
Vanguard Small Cap Index I	SCB-P	VSCIX	1	0	1	1	1	1	1	1	2	9	8	8	8
			-25.9/ -52.8	10.2	96.9	3.9	67.0	9.0	27	27	- 0.04	SCB-P	SCB-P	SCB-P	SCB-P
Vanguard Developed Markets Index Instl	ILCB-P	VTMNX	1	1	1	1	1	1	1	1	2	10	10	10	9
			8.7/ 93.2	7.5	98.4	2.4	21.0	17.0	41	42	- 0.05	ILCB-P	ILCB-P	ILCB-P	ILCB-P
Vanguard Emerging Mkts Stock Idx Instl	EME-P	VEMIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			-7.3/ -93.6	10.4	97.6	2.9	67.0	12.0	18	20	- 0.10	EME-P	EME-P	EME-P	EME-P

Scorecard™

Risk-based Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023
T. Rowe Price Personal Risk-Based Series 	\$2,286.78	N/A	N/A	3	5.0	7	6.8	6	7	7	7

Selection (Underlying Funds)

Asset Allocation	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
T. Rowe Price Dynamic Global Bond I	MSB	RPEIX	1	0	0	0	0	0	1	1	1	4	6	6	6
			4.6	100.0/ 0.0	0.0	4.6/ 1.6	100.6/ 12,028.7	-0.06	15	13	S 0.53	MSB	MSB	MSB	MSB

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
T. Rowe Price Instl Emerging Mkts Eq	EME	IEMFX	1	1	1	0	0	0	0	0	1	4	4	4	4
			20.4/ -98.0	10.4	95.4	20.4/ 0.9	97.7/ 108.1	-0.63	86	94	T 1.00	EME	EME	EME	EME
T. Rowe Price Instl High Yield	HY	TRHYX	1	1	1	0	0	0	1	1	2	7	7	7	7
			100.0/ -100.0	0.0	99.1	9.8/ 5.2	99.4/ 101.0	-0.2	37	40	- 0.50	HY	HY	HY	HY
T. Rowe Price Instl Floating Rate	BL	RPIFX	1	1	1	1	1	0	1	1	2	9	9	9	9
			-72.5/ -90.6	9.5	97.1	6.4/ 5.4	92.2/ 86.6	-0.08	16	14	- 0.57	BL	BL	BL	BL

Scorecard™

continued

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
T. Rowe Price Intl Bd (USD Hdgd) I	GFI	TNBMX	1	1	0	1	1	1	1	1	2	9	9	9	9
			-57.6/ 4.2	11.7	72.9	5.5/ 2.0	67.2/ 47.9	0.57	14	11	- 0.53	GFI	GFI	GFI	GFI
T. Rowe Price Instl Emerging Mkts Bond	SFI	TREBX										SPC	SPC	SPC	SPC
											-	-	-	-	-

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
T. Rowe Price US Trs Long- Term Idx I	LOG-P	PRUUX	0	0	1	1	1	1	1	1	2	8	8	8	9
			100.0/ -73.0	27.3	99.8	0.8	70.0	62.0	52	66	- 0.10	LOG-P	LOG-P	LOG-P	LOG-P

Risk-based Series

Asset Allocation	Assets	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score			
				# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard LifeStrategy Risk-Based Series Inv	\$1,485.09	N/A	N/A	4	4.5	4	9.0	7	7	7	7

Selection (Underlying Funds)

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard Total Stock Mkt Idx Inv	LCB-P	VTSMX	1	1	1	1	1	1	0	1	2	9	10	10	10
			2.3/ 87.1	1.6	99.8	0.7	15.0	24.0	75	74	- 0.14	LCB-P	LCB-P	LCB-P	LCB-P

Scorecard™




continued

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard Total Intl Stock Index Inv	IE-P	VGTSX	1	1	1	1	1	1	1	1	2	10	10	10	10
			7.6/ 42.6	11.7	98.8	1.8	13.0	43.0	23	23	-	IE-P	IE-P	IE-P	IE-P
											0.17				
Vanguard Total Bond Market II Idx Inv	CFI-P	VTBIX	1	1	1	1	1	1	1	1	2	10	10	10	10
			9.7/ 59.0	2.9	99.9	0.3	46.0	27.0	24	30	-	CFI-P	CFI-P	CFI-P	CFI-P
											0.09				
Vanguard Total Intl Bd Idx Investor	GFI-P	VTIBX	1	1	0	0	0	1	1	1	2	7	6	6	6
			-64.9/ 15.9	6.5	71.5	4.8	83.0	35.0	32	19	-	GFI-P	GFI-P	GFI-P	GFI-P
											0.13				

Core Lineup

Asset Allocation	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
American Funds American Balanced R6	\$184,592.89	MOD	RLBGX	1	0	1	1	1	1	1	1	2	9	9	9	9
				11.9	59.0/ 41.0	97.1	11.9/ 9.3	102.9/ 100.2	0.28	8	6	-	MOD	MOD	MOD	MOD
												0.25				
PIMCO Income Instl	\$159,817.96	MSB	PIMIX	1	0	1	1	1	1	1	1	2	9	9	9	9
				6.6	47.9/ 52.1	93.3	6.6/ 3.4	106.6/ 97.8	0.42	19	19	-	MSB	MSB	MSB	MSB
												0.62				

Scorecard™

Active	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard Equity-Income Adm	\$149,783.23	LCV	VEIRX	1	1	1	1	1	1	1	1	1	9	9	9	9
				-89.8/ 89.9	3.0	97.3	16.9/ 11.9	92.5/ 87.7	0.26	34	30	T 0.19	LCV	LCV	LCV	LCV
JPMorgan Mid Cap Growth R6	\$109,471.95	MCG	JMGMX	1	1	1	1	1	1	1	1	2	10	10	10	10
				94.5/ -9.6	7.7	98.0	21.7/ 15.8	101.4/ 95.3	0.62	9	3	- 0.70	MCG	MCG	MCG	MCG
Calvert Small-Cap I 	\$316.48	SCB	CSVIX	0	0	1	1	1	1	0	0	2	6	7	8	8
				-29.5/ -31.3	25.5	90.4	20.1/ 10.4	82.4/ 80.9	0.05	68	63	- 0.94	SCB	SCB	SCB	SCB
PIMCO StocksPLUS Small Institutional 	\$12,202.08	SCB	PSCSX	1	1	1	0	0	0	0	0	2	5	5	5	5
				-5.4/ -99.8	3.7	99.6	26.4/ 9.1	106.5/ 108.6	-0.33	89	97	- 0.75	SCB	SCB	SCB	SCB
T. Rowe Price Integrated US Sm Gr Eq	\$136,795.69	SCG	PRDSX	0	1	1	1	1	1	1	1	2	9	9	7	7
				42.1/ -28.4	8.9	93.3	21.2/ 11.5	86.9/ 80.7	0.33	45	49	- 0.80	SCG	SCG	SCG	SCG
American Beacon International Eq R5 	\$180,331.28	ILCV	AAIEX	1	1	1	1	1	1	0	1	2	9	6	9	9
				-65.6/ 89.5	19.4	95.5	21.5/ 7.6	109.0/ 108.9	0.01	52	42	- 0.72	ILCV	ILCV	ILCV	ILCV
American Funds New World R6	\$97,147.07	EME	RNWGX	0	1	1	1	1	1	1	1	2	9	9	8	9
				41.7/ 18.6	16.6	84.0	18.1/ 8.9	100.4/ 81.5	0.68	8	10	- 0.57	EME	EME	EME	EME
American Funds New Perspective R6	\$299,546.54	GE	RNPGX	1	1	1	1	1	1	1	1	2	10	10	10	10
				54.1/ 62.4	20.0	96.3	19.6/ 13.9	111.5/ 105.0	0.55	13	13	- 0.42	GE	GE	GE	GE
Impax Global Environmental Markets Instl	\$14,865.55	GE	PGINX	1	1	1	1	1	1	1	1	2	10	8	10	10
				53.6/ 28.1	22.8	90.1	21.3/ 12.4	115.4/ 115.2	0.09	26	27	- 0.91	GE	GE	GE	GE

Scorecard™

continued

Active	Assets	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
				Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank		Q4 2023	Q3 2023	Q2 2023	Q1 2023
Fidelity Total Bond Fund	\$434,402.14	CFI	FTBFX	1	1	1	1	1	1	1	1	2	10	10	10	10
				-23.7/ 22.0	8.6	91.1	6.4/ 2.3	110.9/ 96.0	0.63	9	8	- 0.45	CFI	CFI	CFI	CFI
Eaton Vance High Income Opportunities I	\$293.99	HY	EIHIX	1	1	1	1	1	1	1	1	2	10	10	10	10
				95.9/ -89.6	6.9	97.5	9.5/ 6.0	97.7/ 89.7	0.44	4	3	- 0.66	HY	HY	HY	HY
PIMCO International Bond (USD-Hdg) Instl	\$12,425.70	GFI	PFORX	1	1	0	1	1	1	1	1	2	9	9	9	9
				-52.2/ 4.4	7.2	69.9	4.7/ 2.0	57.6/ 38.0	0.53	7	10	- 0.63	GFI	GFI	GFI	GFI
The Standard Stable Asset Fund II	\$543,711.18	SV	SSAFII.Stan										-	SPC	SPC	SPC
													-	-	-	-

Passive	Assets	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
				Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard 500 Index Admiral	\$743,710.12	LCB-P	VFIAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				2.1/ 99.0	2.3	99.7	0.9	36.0	13.0	11	11	- 0.04	LCB- P	LCB- P	LCB- P	LCB- P
Calvert US Large Cap Core Rspnb Idx I	\$19,274.70	LCB-P	CISIX	1	1	1	1	0	1	0	0	2	7	7	8	9
				22.7/ 84.9	2.3	99.4	1.6	82.0	35.0	89	90	- 0.24	LCB- P	LCB- P	LCB- P	LCB- P
Vanguard Growth Index Admiral	\$80,711.82	LCG-P	VIGAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				100.0/ 100.0	0.0	99.3	2.2	59.0	11.0	56	58	- 0.05	LCG- P	LCG- P	LCG- P	LCG- P

Scorecard™

continued

Passive	Assets	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
				Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank		Q4 2023	Q3 2023	Q2 2023	Q1 2023
Vanguard Mid-Cap Value Index Admiral	\$118,756.60	MCV-P	VMVAX	1	0	1	1	1	1	1	1	2	9	9	9	9
				-99.8/ 19.2	6.0	98.5	2.5	31.0	2.0	52	52	- 0.07	MCV-P	MCV-P	MCV-P	MCV-P
Vanguard Small Cap Value Index Admiral	\$162,539.28	SCV-P	VSIAX	1	0	1	0	1	1	1	1	2	8	8	9	9
				-99.8/ -50.9	10.0	96.2	4.4	61.0	9.0	14	19	- 0.07	SCV-P	SCV-P	SCV-P	SCV-P
Fidelity Small Cap Index 	\$12,202.08	SCB-P	FSSNX	1	1	1	1	1	1	1	1	2	10	10	10	10
				-1.5/ -99.2	0.5	100.0	0.1	34.0	5.0	46	46	- 0.03	SCB-P	SCB-P	SCB-P	SCB-P
iShares Russell Small/Mid-Cap Idx K	\$108,315.82	SMCB-P	BSMKX	1	1	1	1	1	1	1	1	2	10	10	10	10
				-23.3/ -56.7	7.7	100.0	0.2	17.0	55.0	22	21	- 0.07	SMCB-P	SMCB-P	SMCB-P	SMCB-P
Vanguard Total Intl Stock Index Admiral	\$400,923.00	IE-P	VTIAX	1	1	1	1	1	1	1	1	2	10	10	10	10
				7.6/ 43.0	12.0	98.8	1.9	48.0	31.0	13	13	- 0.11	IE-P	IE-P	IE-P	IE-P
Vanguard FTSE All-Wld ex-US SmCp Idx Adm	\$812.98	ISMB-P	VFSAX	1	1	1	1	1	1	1	1	2	10	10	10	9
				13.3/ -29.9	14.1	97.1	3.1	62.0	54.0	31	38	- 0.16	ISMB-P	ISMB-P	ISMB-P	ISMB-P

Disclosure

*Strategy Equivalent Score

The CIT exclusively available to RPAG utilizes the same manager and strategy as the Scored fund equivalent, which is highlighted and shown below the CIT option. The Scored fund equivalent generally has a higher fee and is shown for CIT investment due diligence purposes only. The average score includes Strategy Equivalent scores where utilized. For Group Series funds, if Strategy Equivalents are included, the specific Strategy Equivalent(s) within each given series will be indicated in the Allocation (Series Funds) and/or Selection (Underlying Funds) section(s) within the detailed report. Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

ACR#5821538 07/23

Style Box

Asset Allocation - Conservative	Asset Allocation - Moderate	Asset Allocation - Aggressive
	American Funds American Balanced R6 PIMCO RealPath Blend Target Date Series Instl Vanguard LifeStrategy Risk-Based Series Inv T. Rowe Price Personal Risk-Based Series	PIMCO RealPath Blend Target Date Series Instl
Large Cap Value	Large Cap Blend	Large Cap Growth
Vanguard Equity-Income Adm	Calvert US Large Cap Core Rspnb Idx I Vanguard 500 Index Admiral	Vanguard Growth Index Admiral
Mid/Smid Cap Value	Mid/Smid Cap Blend	Mid/Smid Cap Growth
Vanguard Mid-Cap Value Index Admiral	iShares Russell Small/Mid-Cap Idx K	JPMorgan Mid Cap Growth R6
Small Cap Value	Small Cap Blend	Small Cap Growth
Vanguard Small Cap Value Index Admiral	Calvert Small-Cap I PIMCO StocksPLUS Small Institutional	T. Rowe Price Integrated US Sm Gr Eq
International Equity	Global Equity	Cash Alternatives
American Beacon International Eq R5 American Funds New World R6 Vanguard FTSE All-Wld ex-US SmCp Idx Adm Vanguard Total Intl Stock Index Admiral	American Funds New Perspective R6 Impax Global Environmental Markets Instl	The Standard Stable Asset Fund II
Fixed Income	Specialty/Alternatives	Notes
PIMCO Income Instl PIMCO International Bond (USD-Hdg) Instl Eaton Vance High Income Opportunities I Fidelity Total Bond Fund		1. Target Date Fund series show the series name, glidepath risk posture and the average score. 2. Risk based funds are grouped into either conservative, moderate or aggressive style boxes. 3. Only the top 5 scoring funds in each asset class are shown due to spacing concerns.

Disclosure

*Strategy Equivalent Score. Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

Score History

Target Date Series

Asset Allocation	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score							
			# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
PIMCO RealPath Blend Target Date Series Instl	MA	68	10	7.8	12	8.5	8	9	9	9	9	8	9	9

Allocation (Series Funds)

Asset Allocation	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
PIMCO RealPath Blend Income Instl	MOD	PBRNX	7	9	8	8	9	9	9	9
			MOD	MC	MOD	MOD	MC	MC	MC	MC
PIMCO RealPath Blend 2025 Institutional	MOD	PPZRX	8	9	9	9	9	9	9	9
			MOD	MOD	MOD	MOD	MOD	MOD	MOD	MOD
PIMCO RealPath Blend 2030 Institutional	MOD	PBPNX	8	8	8	8	9	9	9	9
			MOD	MOD	MA	MA	MOD	MOD	MOD	MOD
PIMCO RealPath Blend 2035 Institutional	MA	PDGZX	7	8	9	9	9	9	9	9
			MA	MA	MA	MA	MA	MA	MA	MA
PIMCO RealPath Blend 2040 Institutional	MA	PVPNX	9	9	9	9	9	8	9	9
			MA	MA	MA	MA	MA	MA	MA	MA

Score History

continued

Allocation (Series Funds)

Asset Allocation	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
PIMCO RealPath Blend 2045 Institutional	MA	PVQNX	9	9	9	8	9	7	9	9
			MA	AGG	AGG	AGG	AGG	AGG	AGG	AGG
PIMCO RealPath Blend 2050 Institutional	AGG	PPQZX	9	9	9	9	9	8	9	9
			AGG	AGG	AGG	AGG	AGG	AGG	AGG	AGG
PIMCO RealPath Blend 2055 Institutional	AGG	PRQZX	9	9	9	9	9	7	9	9
			AGG	AGG	AGG	AGG	AGG	AGG	AGG	AGG
PIMCO RealPath Blend 2060 Institutional	AGG	PRBMX	HIS	HIS	HIS	HIS	HIS	HIS	HIS	HIS
			-	-	-	-	-	-	-	-

Risk-based Series

Asset Allocation	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score							
			# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
T. Rowe Price Personal Risk-Based Series	N/A	N/A	3	5.0	7	6.8	6	7	7	7	7	8	7	9

Allocation (Series Funds)

Asset Allocation	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
T. Rowe Price Spectrum Mod Gr Allc	MA	TRSGX	6	7	8	8	8	8	7	9
			MA	MA	MA	MA	MA	MA	MA	MA

Score History

Risk-based Series

Asset Allocation	Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score							
			# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Vanguard LifeStrategy Risk-Based Series Inv	N/A	N/A	4	4.5	4	9.0	7	7	7	7	7	7	7	7

Allocation (Series Funds)

Asset Allocation	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Vanguard LifeStrategy Cnsvr Gr Inv	MC	VSCGX	7	7	6	7	7	7	7	7
			MC	MC	MC	MC	MC	MC	MC	MC

Core Lineup

Asset Allocation	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
American Funds American Balanced R6	MOD	RLBGX	9	9	9	9	9	9	9	9
			MOD	MOD	MOD	MOD	MOD	MOD	MOD	MOD
PIMCO Income Instl	MSB	PIMIX	9	9	9	9	9	9	9	9
			MSB	MSB	MSB	MSB	MSB	MSB	MSB	MSB

Score History

Active	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Vanguard Equity-Income Adm	LCV	VEIRX	9	9	9	9	9	9	8	10
			LCV	LCV	LCV	LCV	LCV	LCV	LCV	LCV
JPMorgan Mid Cap Growth R6	MCG	JMGMX	10	10	10	10	10	10	10	10
			MCG	MCG	MCG	MCG	MCG	MCG	MCG	MCG
Calvert Small-Cap I	SCB	CSVIX	6	7	8	8	8	8	8	8
			SCB	SCB	SCB	SCB	SCB	SCB	SCB	SCB
PIMCO StocksPLUS Small Institutional	SCB	PSCSX	5	5	5	5	7	7	7	7
			SCB	SCB	SCB	SCB	SCB	SCB	SCB	SCB
T. Rowe Price Integrated US Sm Gr Eq	SCG	PRDSX	9	9	7	7	7	7	7	7
			SCG	SCG	SCG	SCG	SCG	SCG	SCG	SCG
American Beacon International Eq R5	ILCV	AAIEX	9	6	9	9	6	6	8	7
			ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV
American Funds New World R6	EME	RNWGX	9	9	8	9	9	9	9	9
			EME	EME	EME	EME	EME	EME	EME	EME
American Funds New Perspective R6	GE	RNPGX	10	10	10	10	10	10	10	10
			GE	GE	GE	GE	GE	GE	GE	GE
Impax Global Environmental Markets Instl	GE	PGINX	10	8	10	10	10	6	7	6
			GE	GE	GE	GE	GE	GE	GE	GE

Score History

continued

Active	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Fidelity Total Bond Fund	CFI	FTBFX	10	10	10	10	10	10	10	9
			CFI	CFI	CFI	CFI	CFI	CFI	CFI	CFI
Eaton Vance High Income Opportunities I	HY	EIHIX	10	10	10	10	10	10	10	10
			HY	HY	HY	HY	HY	HY	HY	HY
PIMCO International Bond (USD-Hdg) Instl	GFI	PFORX	9	9	9	9	9	9	9	9
			GFI	GFI	GFI	GFI	GFI	GFI	GFI	GFI
The Standard Stable Asset Fund II	SV	SSAFII.Stan	-	SPC	SPC	SPC	SPC	SPC	SPC	SPC
			-	-	-	-	-	-	-	-

Passive	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Vanguard 500 Index Admiral	LCB-P	VFIAX	10	10	10	10	10	10	10	10
			LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P
Calvert US Large Cap Core Rspnb Idx I	LCB-P	CISIX	7	7	8	9	9	9	9	9
			LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P	LCB-P
Vanguard Growth Index Admiral	LCG-P	VIGAX	10	10	10	10	10	10	10	10
			LCG-P	LCG-P	LCG-P	LCG-P	LCG-P	LCG-P	LCG-P	LCG-P

Score History

continued

Passive	Asset Class	Ticker/ ID	Score							
			Q4 2023	Q3 2023	Q2 2023	Q1 2023	Q4 2022	Q3 2022	Q2 2022	Q1 2022
Vanguard Mid-Cap Value Index Admiral	MCV-P	VMVAX	9	9	9	9	9	9	9	9
			MCV-P	MCV-P	MCV-P	MCV-P	MCV-P	MCV-P	MCV-P	MCV-P
Vanguard Small Cap Value Index Admiral	SCV-P	VSIAX	8	8	9	9	9	10	10	10
			SCV-P	SCV-P	SCV-P	SCV-P	SCV-P	SCV-P	SCV-P	SCV-P
iShares Russell Small/Mid-Cap Idx K	SMCB-P	BSMKX	10	10	10	10	10	10	10	10
			SMCB-P	SMCB-P	SMCB-P	SMCB-P	SMCB-P	SMCB-P	SMCB-P	SMCB-P
Vanguard Total Intl Stock Index Admiral	IE-P	VTIAX	10	10	10	10	10	9	9	9
			IE-P	IE-P	IE-P	IE-P	IE-P	IE-P	IE-P	IE-P
Vanguard FTSE All-Wld ex-US SmCp Idx Adm	ISMB-P	VFSAX	10	10	10	9	8	8	7	6
			ISMB-P	ISMB-P	ISMB-P	ISMB-P	ISMB-P	ISMB-P	ISMB-P	ISMB-P

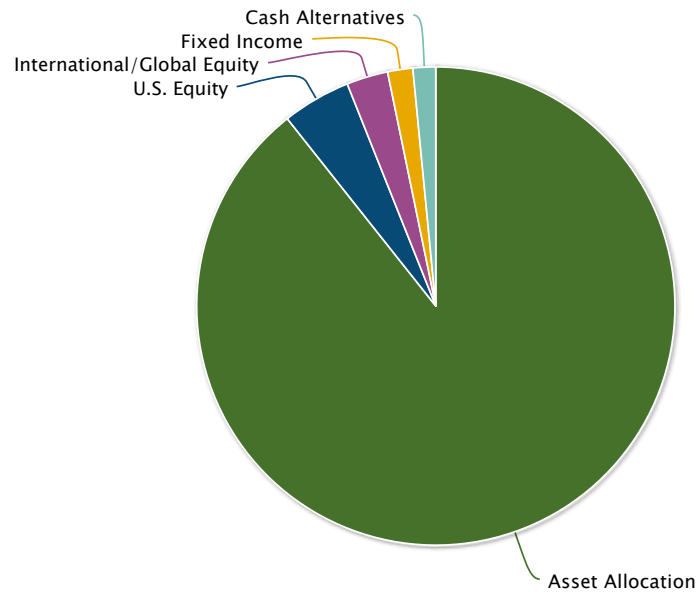
Disclosure

*Strategy Equivalent Score

The CIT exclusively available to RPAG utilizes the same manager and strategy as the Scored fund equivalent, which is highlighted and shown below the CIT option. The Scored fund equivalent generally has a higher fee and is shown for CIT investment due diligence purposes only. The average score includes Strategy Equivalent scores where utilized. For Group Series funds, if Strategy Equivalents are included, the specific Strategy Equivalent(s) within each given series will be indicated in the Allocation (Series Funds) and/or Selection (Underlying Funds) section(s) within the detailed report. Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

ACR#5821538 07/23

Plan Allocation by Investment Type



Investment Type	Assets	Percentage
Asset Allocation	\$31,679,846.63	89.3%
U.S. Equity	\$1,641,877.77	4.6%
International/Global Equity	\$993,626.42	2.8%
Fixed Income	\$606,939.79	1.7%
Cash Alternatives	\$543,711.18	1.5%
Total	\$35,466,001.79	100%
as of 12/31/2023		

Plan Allocation by Investment Type

Investment Name	Asset Class	Amount	Percentage	Score
Asset Allocation		\$31,679,847		
Vanguard LifeStrategy Cnsvr Gr Inv	MC	\$1,485	0.0%	7
PIMCO RealPath Blend 2025 Institutional	MOD	\$4,527,109	12.8%	8
PIMCO RealPath Blend 2030 Institutional	MOD	\$5,408,045	15.2%	8
PIMCO RealPath Blend Income Instl	MOD	\$6,930,432	19.5%	7
American Funds American Balanced R6	MOD	\$184,593	0.5%	9
PIMCO RealPath Blend 2035 Institutional	MA	\$5,298,104	14.9%	7
PIMCO RealPath Blend 2040 Institutional	MA	\$4,208,638	11.9%	9
PIMCO RealPath Blend 2045 Institutional	MA	\$2,885,751	8.1%	9
T. Rowe Price Spectrum Mod Gr Altc	MA	\$2,287	0.0%	6
PIMCO RealPath Blend 2050 Institutional	AGG	\$1,427,192	4.0%	9
PIMCO RealPath Blend 2055 Institutional	AGG	\$598,516	1.7%	9
PIMCO RealPath Blend 2060 Institutional	AGG	\$207,694	0.6%	HIS
U.S. Equity		\$1,641,878		
Vanguard Equity-Income Adm	LCV	\$149,783	0.4%	9
JPMorgan Mid Cap Growth R6	MCG	\$109,472	0.3%	10
Calvert Small-Cap I	SCB	\$316	0.0%	6
PIMCO StocksPLUS Small Institutional	SCB	\$12,202	0.0%	5
T. Rowe Price Integrated US Sm Gr Eq	SCG	\$136,796	0.4%	9
Vanguard 500 Index Admiral	LCB-P	\$743,710	2.1%	10
Calvert US Large Cap Core Rspnb Idx I	LCB-P	\$19,275	0.1%	7
Vanguard Growth Index Admiral	LCG-P	\$80,712	0.2%	10
Vanguard Mid-Cap Value Index Admiral	MCV-P	\$118,757	0.3%	9
Vanguard Small Cap Value Index Admiral	SCV-P	\$162,539	0.5%	8

Plan Allocation by Investment Type

Investment Name	Asset Class	Amount	Percentage	Score
iShares Russell Small/Mid-Cap Idx K	SMCB-P	\$108,316	0.3%	10
International/Global Equity		\$993,626		
American Beacon International Eq R5	ILCV	\$180,331	0.5%	9
American Funds New World R6	EME	\$97,147	0.3%	9
American Funds New Perspective R6	GE	\$299,547	0.8%	10
Impax Global Environmental Markets Instl	GE	\$14,866	0.0%	10
Vanguard Total Intl Stock Index Admiral	IE-P	\$400,923	1.1%	10
Vanguard FTSE All-Wld ex-US SmCp Idx Adm	ISMB-P	\$813	0.0%	10
Fixed Income		\$606,940		
PIMCO Income Instl	MSB	\$159,818	0.5%	9
Fidelity Total Bond Fund	CFI	\$434,402	1.2%	10
Eaton Vance High Income Opportunities I	HY	\$294	0.0%	10
PIMCO International Bond (USD-Hdg) Instl	GFI	\$12,426	0.0%	9
Cash Alternatives		\$543,711		
The Standard Stable Asset Fund II	SV	\$543,711	1.5%	
Total		\$35,466,002	100.0%	

Disclosure

*Strategy Equivalent Score

The CIT exclusively available to RPAG utilizes the same manager and strategy as the Scored fund equivalent, which is highlighted and shown below the CIT option. The Scored fund equivalent generally has a higher fee and is shown for CIT investment due diligence purposes only. The average score includes Strategy Equivalent scores where utilized. For Group Series funds, if Strategy Equivalents are included, the specific Strategy Equivalent(s) within each given series will be indicated in the Allocation (Series Funds) and/or Selection (Underlying Funds) section(s) within the detailed report. Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score. ACR#5821538 07/23


Returns Analysis

Allocation (Series Funds)

Performance as of 12/31/2023

Asset Allocation	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio	
				1 Year	3 Year	5 Year	10 Year				Gross	Net
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	8.43	12.48	12.48	0.46	5.52	4.77	6.41	9/30/1994	9/30/1994	0.12	0.12
StyleBenchmark		8.48	12.08	12.08	0.70	5.84	4.83	-	-	-	-	-

Allocation (Series Funds)

Asset Allocation	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio	
				1 Year	3 Year	5 Year	10 Year				Gross	Net
T. Rowe Price Spectrum Mod Gr Allc 	TRSGX	9.86	18.03	18.03	2.66	9.25	7.31	8.82	7/29/1994	7/29/1994	0.94	0.79
StyleBenchmark		10.23	18.76	18.76	4.40	10.20	7.46	-	-	-	-	-

Allocation (Series Funds)

Asset Allocation	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio	
				1 Year	3 Year	5 Year	10 Year				Gross	Net
PIMCO RealPath Blend Income Instl	PBRNX	8.47	10.87	10.87	0.46	6.12	-	4.92	12/31/2014	12/31/2014	0.51	0.51
StyleBenchmark		8.71	12.41	12.41	0.67	5.96	-	-	-	-	-	-
PIMCO RealPath Blend 2025 Institutional	PPZRX	8.79	11.87	11.87	1.06	7.19	-	5.55	12/31/2014	12/31/2014	0.47	0.47
StyleBenchmark		9.14	14.03	14.03	1.58	7.04	-	-	-	-	-	-
PIMCO RealPath Blend 2030 Institutional	PBPNX	9.32	13.70	13.70	1.96	8.00	-	6.15	12/31/2014	12/31/2014	0.39	0.39
StyleBenchmark		9.57	15.66	15.66	2.49	8.12	-	-	-	-	-	-
PIMCO RealPath Blend 2035 Institutional	PDGZX	9.86	15.86	15.86	3.40	9.05	-	6.76	12/31/2014	12/31/2014	0.32	0.32
StyleBenchmark		9.95	17.13	17.13	3.29	9.06	-	-	-	-	-	-
PIMCO RealPath Blend 2040 Institutional	PVPNX	10.16	17.25	17.25	4.24	9.78	-	7.20	12/31/2014	12/31/2014	0.26	0.26
StyleBenchmark		10.23	18.19	18.19	3.88	9.75	-	-	-	-	-	-
PIMCO RealPath Blend 2045 Institutional	PVQNX	10.47	18.41	18.41	4.85	10.33	-	7.46	12/31/2014	12/31/2014	0.20	0.20
StyleBenchmark		10.43	18.98	18.98	4.30	10.23	-	-	-	-	-	-
PIMCO RealPath Blend 2050 Institutional	PPQZX	10.63	19.13	19.13	5.30	10.68	-	7.67	12/31/2014	12/31/2014	0.16	0.16
StyleBenchmark		10.56	19.48	19.48	4.57	10.55	-	-	-	-	-	-
PIMCO RealPath Blend 2055 Institutional	PRQZX	10.76	19.55	19.55	5.57	10.74	-	7.69	12/31/2014	12/31/2014	0.15	0.15
StyleBenchmark		10.58	19.55	19.55	4.61	10.59	-	-	-	-	-	-
PIMCO RealPath Blend 2060 Institutional	PRBMX	10.87	19.92	19.92	5.80	-	-	7.65	12/31/2019	12/31/2019	0.15	0.15
Aggressive Benchmark		10.92	20.93	20.93	5.25	11.01	7.67	-	-	-	-	-

Returns Analysis

Core Lineup

Asset Allocation	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio		
				1 Year	3 Year	5 Year	10 Year				Gross	Net	
Asset Allocation													
Moderate													
American Funds American Balanced R6	RLBGX	9.96	14.37	14.37	5.40	9.26	7.88	10.44	5/1/2009	7/25/1975	0.25	0.25	
StyleBenchmark		8.84	15.99	15.99	3.73	8.69	6.64	-	-	-	-	-	
Fixed Income													
Multisector Bond													
PIMCO Income Instl	PIMX	5.89	9.32	9.32	1.12	3.40	4.44	6.78	3/30/2007	3/30/2007	0.62	0.62	
StyleBenchmark		5.65	8.88	8.88	-0.30	2.68	2.72	-	-	-	-	-	
Active	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio		
				1 Year	3 Year	5 Year	10 Year				Gross	Net	
U.S. Equity													
Large Cap Value													
Vanguard Equity-Income Adm	VEIRX	8.99	7.76	7.76	10.63	11.85	9.70	8.39	8/13/2001	3/21/1988	0.19	0.19	
Russell 1000 Value Index		9.50	11.46	11.46	8.86	10.91	8.40	-	-	-	-	-	
Mid Cap Growth													
JPMorgan Mid Cap Growth R6	JMGMX	13.21	23.35	23.35	0.00	15.76	11.41	13.89	11/1/2011	3/2/1989	0.75	0.70	
Russell Mid-Cap Growth Index		14.55	25.87	25.87	1.31	13.81	10.57	-	-	-	-	-	
Small Cap Blend													
PIMCO StocksPLUS Small Institutional 🛑	PSCSX	14.70	17.08	17.08	0.54	9.06	7.05	9.36	3/31/2006	3/31/2006	0.75	0.75	
Calvert Small-Cap I 🟡	CSVIX	11.55	11.73	11.73	4.07	10.35	8.41	8.37	4/29/2005	10/1/2004	0.94	0.94	
Russell 2000 Index		14.03	16.93	16.93	2.22	9.97	7.16	-	-	-	-	-	
Small Cap Growth													
T. Rowe Price Integrated US Sm Gr Eq	PRDSX	12.65	21.16	21.16	1.52	11.46	9.01	8.02	6/30/1997	6/30/1997	0.80	0.80	
Russell 2000 Growth Index		12.75	18.66	18.66	-3.50	9.22	7.16	-	-	-	-	-	
International/Global Equity													
International Large Cap Value													
American Beacon International Eq R5 🟡	AAIEX	9.61	22.46	22.46	6.17	7.64	3.29	6.75	8/7/1991	8/7/1991	0.72	0.72	
MSCI EAFE Large Value ND USD		8.02	19.67	19.67	8.80	7.58	3.08	-	-	-	-	-	
Emerging Market Equity													
American Funds New World R6	RNWX	8.95	16.22	16.22	-1.49	8.93	5.51	8.36	5/1/2009	6/17/1999	0.57	0.57	
MSCI EM (Emerging Markets) ND USD		7.86	9.83	9.83	-5.08	3.69	2.66	-	-	-	-	-	

Returns Analysis

Active	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio		
				1 Year	3 Year	5 Year	10 Year				Gross	Net	
Global Equity													
Impax Global Environmental Markets Instl	PGINX	14.07	16.85	16.85	3.49	12.35	7.60	7.03	3/27/2008	3/27/2008	0.91	0.91	
American Funds New Perspective R6	RNPGX	11.44	25.01	25.01	3.17	13.90	10.10	12.61	5/1/2009	3/13/1973	0.42	0.42	
MSCI ACWI NR		11.03	22.20	22.20	5.75	11.72	7.93	-	-	-	-	-	
Fixed Income													
Core Fixed Income													
Fidelity Total Bond Fund	FTBFX	6.84	7.25	7.25	-2.28	2.31	2.58	4.06	10/15/2002	10/15/2002	0.45	0.45	
BB Aggregate Bond		6.82	5.53	5.53	-3.31	1.10	1.81	-	-	-	-	-	
High Yield													
Eaton Vance High Income Opportunities I	EIHX	6.21	11.96	11.96	3.79	6.03	4.85	7.00	10/1/2009	6/8/1994	0.66	0.66	
BB US HY 2% Issuer Cap		7.15	13.44	13.44	1.98	5.35	4.59	-	-	-	-	-	
Global Fixed Income													
PIMCO International Bond (USD-Hdg) Instl	PFORX	5.98	9.49	9.49	-0.99	2.04	3.45	6.28	12/2/1992	12/2/1992	0.63	0.63	
BB Global Agg		8.10	5.72	5.72	-5.51	-0.32	0.38	-	-	-	-	-	
Cash Alternatives													
Stable Value													
The Standard Stable Asset Fund II	SSAFII.Stan	-	-	-	-	-	-	-	-	-	-	-	
No Benchmark Data		-	-	-	-	-	-	-	-	-	-	-	
Passive	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio		
				1 Year	3 Year	5 Year	10 Year				Gross	Net	
U.S. Equity													
Large Cap Blend													
Vanguard 500 Index Admiral	VFIAX	11.68	26.24	26.24	9.96	15.65	11.99	7.62	11/13/2000	8/31/1976	0.04	0.04	
Calvert US Large Cap Core Rspnb Idx I	CISIX	12.82	27.26	27.26	7.79	15.97	12.06	6.43	6/30/2000	6/30/2000	0.34	0.24	
Russell 1000 Index		11.96	26.53	26.53	8.97	15.52	11.80	-	-	-	-	-	
Large Cap Growth													
Vanguard Growth Index Admiral	VIGAX	14.41	46.77	46.77	7.69	19.16	13.97	8.21	11/13/2000	11/2/1992	0.05	0.05	
Russell 1000 Growth Index		14.16	42.68	42.68	8.86	19.50	14.86	-	-	-	-	-	
Mid Cap Value													
Vanguard Mid-Cap Value Index Admiral	VMVAX	11.51	9.76	9.76	9.18	11.31	8.49	11.84	9/27/2011	9/27/2011	0.07	0.07	
Russell Mid-Cap Value Index		12.11	12.71	12.71	8.36	11.16	8.26	-	-	-	-	-	
Small Cap Value													
Vanguard Small Cap Value Index Admiral	VSIAX	13.63	15.99	15.99	10.45	11.85	8.49	12.05	9/27/2011	5/21/1998	0.07	0.07	
Russell 2000 Value Index		15.26	14.65	14.65	7.94	10.00	6.76	-	-	-	-	-	

Returns Analysis

Passive	Ticker/ I D	QTR	YTD	Annualized Returns				Since Incept.	Share Class Inception	Strategy Inception	Expense Ratio	
				1 Year	3 Year	5 Year	10 Year				Gross	Net
Small Cap Blend												
Fidelity Small Cap Index 	FSSNX	14.05	17.12	17.12	2.32	10.07	7.32	10.73	9/8/2011	9/8/2011	0.03	0.03
Russell 2000 Index		14.03	16.93	16.93	2.22	9.97	7.16	-	-	-	-	-
SMid Cap Blend												
iShares Russell Small/Mid-Cap Idx K	BSMKX	13.20	17.19	17.19	4.16	11.65	-	8.78	8/13/2015	8/13/2015	0.09	0.07
Russell 2500 Index		13.35	17.42	17.42	4.24	11.67	8.36	-	-	-	-	-
International/Global Equity												
International Equity												
Vanguard Total Intl Stock Index Admiral	VTIAX	9.97	15.52	15.52	1.77	7.34	4.09	4.86	11/29/2010	4/29/1996	0.11	0.11
MSCI ACWI ex USA NR		9.75	15.62	15.62	1.55	7.08	3.83	-	-	-	-	-
International Small-Mid Cap Blend												
Vanguard FTSE All-World ex-US SmCap Idx Adm	VFSAX	10.41	15.14	15.14	0.71	6.81	3.89	5.46	2/7/2019	4/2/2009	0.16	0.16
MSCI EAFE Smid Cap ND USD		10.84	15.05	15.05	-0.31	6.53	4.52	-	-	-	-	-

Disclosure

For use by Plan Sponsors or Institutional Investors Only- not intended for distribution to Retail Investors

Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted.

The performance data quoted may not reflect the deduction of additional fees, if applicable. Additional fees would reduce the performance quoted.

Performance data is subject to change without prior notice. Expenses shown reflect the fund's prospectus Net and Gross expense ratios.

Some funds, accounts, or share classes may not be available for investment. Performance history prior to inception (if applicable) reflects another share class or account reflecting the manager's historical performance record. Expenses for mutual funds reflect the fund's prospectus Net and Gross expense ratios. In the case of Collective Investment Trust Funds, expenses generally reflect the CIT fund fact sheet and/ or Trust agreement Fund Inception Date - the date on which a fund commenced operations.

Share Class Inception Date - the date on which a fund's share class was introduced.

Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

Contact Accelerate Retirement- Lloyd Engleman with any questions about this report or for the most current month-end performance at .

Considerations

Watchlist													
Asset Allocation			Asset Class	Risk Index	Allocation Score (Series Funds)		Selection Score (Underlying Funds)		Blended Score				
					# of Funds	Avg Score	# of Funds	Avg Score	Q4 2023	Q3 2023	Q2 2023	Q1 2023	
T. Rowe Price Personal Risk-Based Series			🇺🇸	N/A	N/A	3	5.0	7	6.8	6	7	7	7

Asset Allocation	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score Components		Score
			Risk Level	Style Diversity	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	SR Rank	2pt Max/ Expense	Allocation	Selection	Q4 2023
T. Rowe Price Spectrum Mod Gr Allc	MA	TRSGX	1	1	1	0	0	0	0	0	2	5	6.8	6
			15.2	80.3/ 19.7	98.7	15.2/ 9.3	96.2/ 99.9	-0.55	67	67	-			MA
											0.79			

Considerations

Eliminate Funds PIMCO StocksPLUS Small Institutional AND Map to Fidelity Small Cap Index

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
PIMCO StocksPLUS Small Institutional	SCB	PSCSX	1	1	1	0	0	0	0	0	2	5	5	5	5
			-5.4/ -99.8	3.7	99.6	26.4/ 9.1	106.5/ 108.6	-0.33	89	97	-	SCB	SCB	SCB	SCB
											0.75				

Passive	Asset Class	Ticker/ ID	Style				Peer Group				Qual	Score			
			Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Fidelity Small Cap Index	SCB-P	FSSNX	1	1	1	1	1	1	1	1	2	10	10	10	10
			-1.5/ -99.2	0.5	100.0	0.1	34.0	5.0	46	46	-	SCB-P	SCB-P	SCB-P	SCB-P
											0.03				

Watchlist

Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
Calvert Small-Cap I	SCB	CSVIX	0	0	1	1	1	1	0	0	2	6	7	8	8
			-29.5/ -31.3	25.5	90.4	20.1/ 10.4	82.4/ 80.9	0.05	68	63	-	SCB	SCB	SCB	SCB
											0.94				




Considerations


Watchlist															
Active	Asset Class	Ticker/ ID	Style			Risk/Return			Peer Group		Qual	Score			
			Style	Style Drift	R ²	Risk/ Return	Up/ Down	Info Ratio	Return Rank	Info Ratio Rank	2pt Max/ Expense	Q4 2023	Q3 2023	Q2 2023	Q1 2023
American Beacon International Eq R5		AAIEX	1	1	1	1	1	1	0	1	2	9	6	9	9
			-65.6/ 89.5	19.4	95.5	21.5/ 7.6	109.0/ 108.9	0.01	52	42	- 0.72	ILCV	ILCV	ILCV	ILCV

Disclosure

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Summary of Considerations

Watchlist	Asset Class	Fund	Score
	Group Series	T. Rowe Price Personal Risk-Based Series	6
	SCB	Calvert Small-Cap I	6
	ILCV	American Beacon International Eq R5	9

Add	Asset Class	Fund	Score
	SCB-P	Fidelity Small Cap Index	10

Eliminate	Asset Class	Fund	Score	Action	Asset Class	Fund	Score
	SCB	PIMCO StocksPLUS Small Institutional	5	map to	SCB-P	Fidelity Small Cap Index	10

Considerations:  Add  Delete  Watchlist

* Strategy Equivalent Score. Non-scoring funds will be assigned a letter. The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

Total Cost Analysis

Transamerica								
Asset Class	Assets		Score	Fund Name	Expense		Revenue Sharing	
	(\$)	(%)			(%)	(\$)	(%)	(\$)
MOD	\$4,527,109	12.77%	8	PIMCO RealPath Blend 2025 Institutional	0.47%	\$21,277	0.00%	\$0
MOD	\$5,408,046	15.25%	8	PIMCO RealPath Blend 2030 Institutional	0.39%	\$21,091	0.00%	\$0
MOD	\$6,930,432	19.54%	7	PIMCO RealPath Blend Income Instl	0.51%	\$35,345	0.00%	\$0
MA	\$5,298,104	14.94%	7	PIMCO RealPath Blend 2035 Institutional	0.32%	\$16,954	0.00%	\$0
MA	\$4,208,638	11.87%	9	PIMCO RealPath Blend 2040 Institutional	0.26%	\$10,942	0.00%	\$0
MA	\$2,885,751	8.14%	9	PIMCO RealPath Blend 2045 Institutional	0.20%	\$5,772	0.00%	\$0
AGG	\$1,427,192	4.02%	9	PIMCO RealPath Blend 2050 Institutional	0.16%	\$2,284	0.00%	\$0
AGG	\$598,516	1.69%	9	PIMCO RealPath Blend 2055 Institutional	0.15%	\$898	0.00%	\$0
AGG	\$207,694	0.59%	HIS	PIMCO RealPath Blend 2060 Institutional	0.15%	\$312	0.00%	\$0
MA	\$2,287	0.01%	6	T. Rowe Price Spectrum Mod Gr Allc	0.79%	\$18	0.15%	\$3
MC	\$1,485	0.00%	7	Vanguard LifeStrategy Cnsrv Gr Inv	0.12%	\$2	0.00%	\$0
MOD	\$184,593	0.52%	9	American Funds American Balanced R6	0.25%	\$461	0.00%	\$0
LCV	\$149,783	0.42%	9	Vanguard Equity-Income Adm	0.19%	\$285	0.00%	\$0
LCB	\$19,275	0.05%	7	Calvert US Large Cap Core Rspnb Idx I	0.24%	\$46	0.10%	\$19
LCB	\$743,710	2.10%	10	Vanguard 500 Index Admiral	0.04%	\$297	0.00%	\$0
LCG	\$80,712	0.23%	10	Vanguard Growth Index Admiral	0.05%	\$40	0.00%	\$0
MCV	\$118,757	0.34%	9	Vanguard Mid-Cap Value Index Admiral	0.07%	\$83	0.00%	\$0
MCG	\$109,472	0.31%	10	JPMorgan Mid Cap Growth R6	0.70%	\$766	0.00%	\$0
SCV	\$162,539	0.46%	8	Vanguard Small Cap Value Index Admiral	0.07%	\$114	0.00%	\$0
SCB	\$317	0.00%	6	Calvert Small-Cap I	0.94%	\$3	0.10%	\$0
SCB	\$12,202	0.03%	5	PIMCO StocksPLUS Small Institutional	0.75%	\$92	0.00%	\$0
SCG	\$136,796	0.39%	9	T. Rowe Price Integrated US Sm Gr Eq	0.80%	\$1,094	0.15%	\$205
SMCB	\$108,316	0.31%	10	iShares Russell Small/Mid-Cap Idx K	0.07%	\$76	0.00%	\$0
IE	\$400,923	1.13%	10	Vanguard Total Intl Stock Index Admiral	0.11%	\$441	0.00%	\$0
ILCV	\$180,331	0.51%	9	American Beacon International Eq R5	0.72%	\$1,298	0.04%	\$72
ISMB	\$813	0.00%	10	Vanguard FTSE All-Wld ex-US SmCp Idx Adm	0.16%	\$1	0.00%	\$0

Total Cost Analysis

Transamerica								
Asset Class	Assets		Score	Fund Name	Expense		Revenue Sharing	
	(\$)	(%)			(%)	(\$)	(%)	(\$)
EME	\$97,147	0.27%	9	American Funds New World R6	0.57%	\$554	0.00%	\$0
GE	\$299,547	0.85%	10	American Funds New Perspective R6	0.42%	\$1,258	0.00%	\$0
GE	\$14,866	0.04%	10	Impax Global Environmental Markets Instl	0.91%	\$135	0.10%	\$15
CFI	\$434,402	1.23%	10	Fidelity Total Bond Fund	0.45%	\$1,955	0.10%	\$434
HY	\$294	0.00%	10	Eaton Vance High Income Opportunities I	0.66%	\$2	0.15%	\$0
GFI	\$12,426	0.04%	9	PIMCO International Bond (USD-Hdg) Instl	0.63%	\$78	0.00%	\$0
MSB	\$159,818	0.45%	9	PIMCO Income Instl	0.62%	\$991	0.00%	\$0
SV	\$543,711	1.53%	-	The Standard Stable Asset Fund II	0.00%	\$0	0.00%	\$0
Totals	\$35,466,002	100.00%			%	\$		
Weighted Investment Expense					0.35%	\$124,966	0.00%	\$750
Asset-Based Fees					0.25%	\$89,545		
Billed Fees					0.18%	\$62,284		
TOTALS					0.78%	\$276,795		

*Strategy Equivalent Score

Non-scoring funds will be assigned a letter.; The letter definitions are HIS= fund does not have enough performance history to Score; SPC= fund is in a specialty category that does not Score; OTH= fund may no longer be active, not in database or available to Score.

Information is for illustrative purposes only and cannot be guaranteed now or in the future.

Fee Summary & Net Recordkeeping Cost

Total Plan Assets: \$35,466,002 as of 12/31/2023; Total Number of Participants: 1014

Fee Summary

	Transamerica
Annual Fees:	
Recordkeeper Fees %	0.25%
Recordkeeper Fees \$	\$90,295
Net Investment Exp. %	0.35%
Net Investment Exp. \$	\$124,216
Advisory Fees %	0.18%
Advisory Fees \$	\$62,284
Estimated Total Plan Cost %	0.78%
Estimated Total Plan Cost \$	\$276,795

Net Recordkeeping Cost

Assumes 1014 participants	Transamerica
Revenue Sharing	\$750
Asset-Based Fees	\$89,545
Billed Fees	\$62,284
Subtotal	\$152,579
(Advisor Compensation)	(\$62,284)
Net Recordkeeping & Admin. Cost	\$90,295
Cost as %	0.25%
Cost as Participant Average	\$89

Asset Allocation Risk Level

Moderate Aggressive funds typically display a bias towards equity investments. The peer group in this analysis is comprised of funds with an asset allocation objective whose five year standard deviation ranges from 13.75% to 16.5%.

Investment Rank

No managers scored 9 or 10

Scorecard System

Scorecard - Asset Allocation	Ticker/ ID	Style			Risk / Return			Peer Group		Qual.	Allocation
		Risk Level	Style Diversity	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	SR Rank	(2pt max)	Score
T. Rowe Price Spectrum Mod Gr Allc	TRSGX	1	1	1	0	0	0	0	0	2	5

Scorecard Factors

	Style: Equity	Style: Fixed	R ²	Risk	Return	Up Cap	Down Cap	Info Ratio	Return Rank	SR Rank	Qual. Detail	Qual. Score
T. Rowe Price Spectrum Mod Gr Allc	80.31	19.69	98.71	15.23	9.25	96.20	99.85	-0.55	67.00	67.00		2
Style Benchmark	NA	NA		15.22	10.20	100.00	100.00	NA	NA			

Notes

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2. Style analytics reflect the parameters on a returns-based style map (on a scale of 100 to -100 for each axis.) Fund passes if it plots out in the appropriate section of the style map, representing the fund's stated style.
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9. Qualitative Detail: T = Tenure (qualitative score impacted negatively due to low manager tenure); E = Expenses (qualitative score impacted negatively due to higher than average expense ratio); and S = Statistics (qualitative score impacted negatively due to weak/poor strength of statistics).

Summary

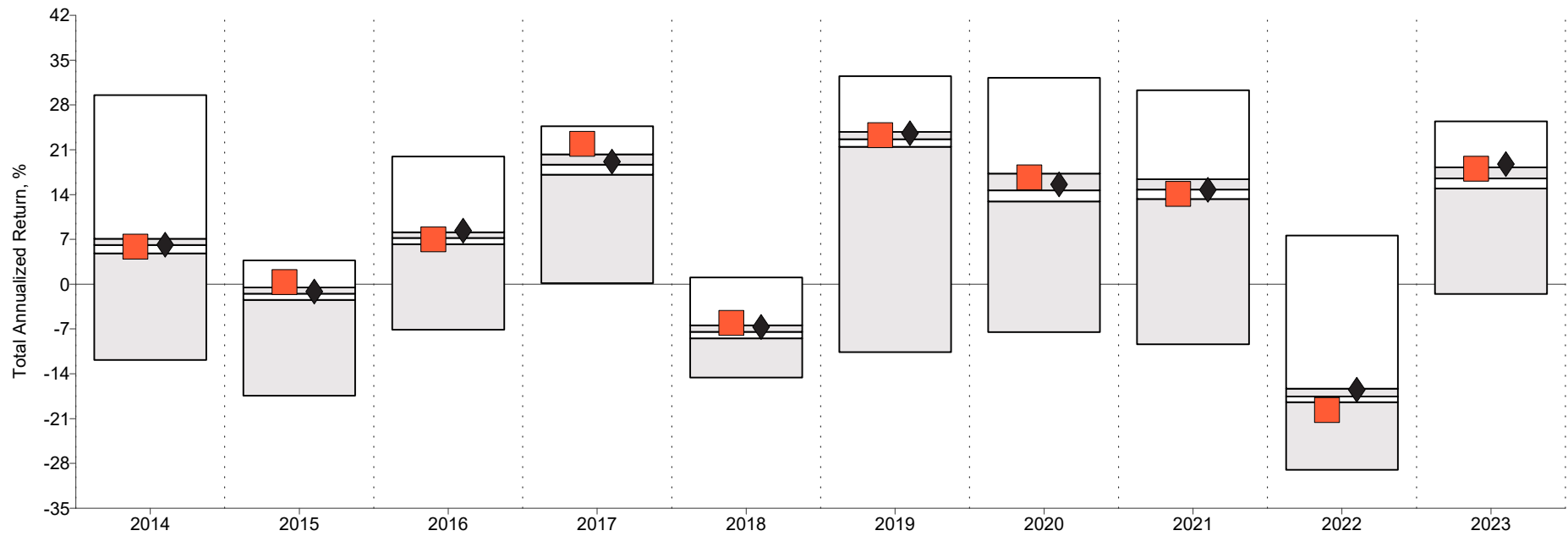
	QTR	YTD	1 Yr	3 Yr Ann.	5 Yr Ann.	10 Yr Ann.	Since Inception	Manager Tenure (Years)	Fund Inception	Net Exp. Ratio	Gross Exp. Ratio
T. Rowe Price Spectrum Mod Gr Allc	9.86	18.03	18.03	2.66	9.25	7.31	8.82	12.68	07/29/1994	0.79	0.94
Style Benchmark	10.23	18.76	18.76	4.40	10.20	7.46					
<i>Moderate Aggressive Average</i>	<i>9.94</i>	<i>16.29</i>	<i>16.29</i>	<i>3.50</i>	<i>9.16</i>	<i>6.49</i>				<i>1.05</i>	<i>1.10</i>

Notes

1. Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted.
2. The performance data quoted may not reflect the deduction of additional fees, if applicable. Additional fees would reduce the performance quoted.
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5. Contact RPAG with any questions about this report or for the most current month-end performance at (877)-360-2480.

Contact Accelerate Retirement- Lloyd Engleman with any questions about this report or for the most current month-end performance at .

Floating Peer Group Bar Chart

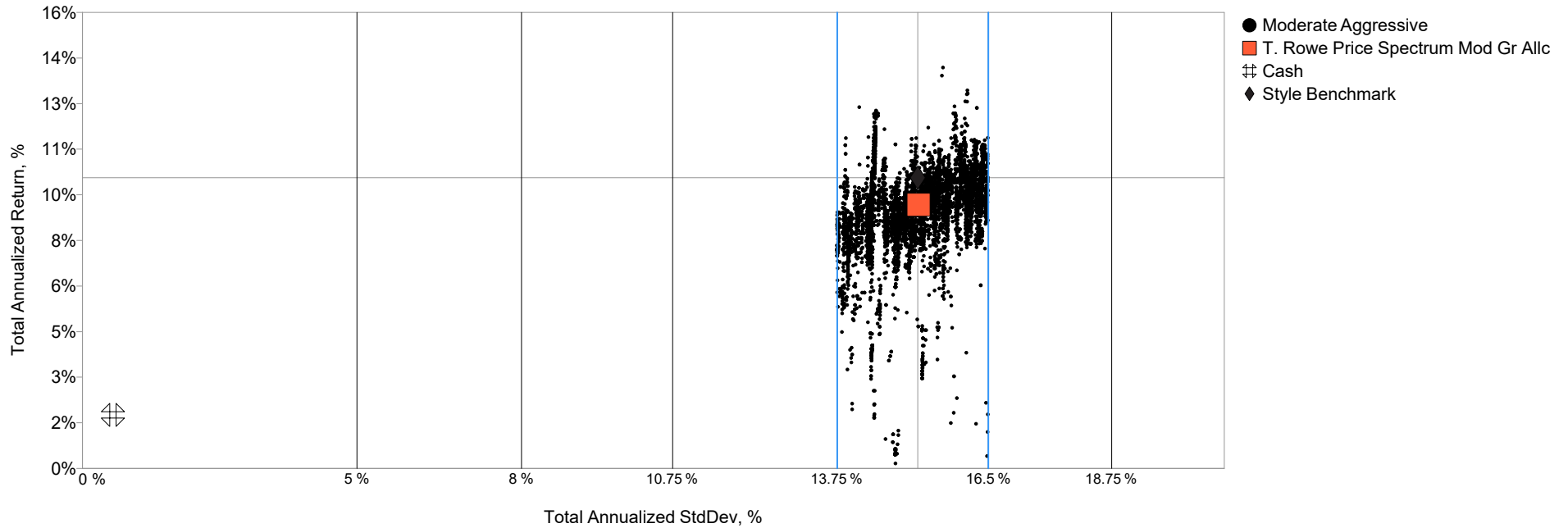


Performance Table

	2014	2015	2016	2017	2018	2019	2020	2021	2022	YTD
■ T. Rowe Price Spectrum Mod Gr Allc	5.86	0.33	7.02	21.91	-6.07	23.28	16.67	14.12	-19.66	18.03
◆ Style Benchmark	6.16	-1.17	8.37	19.13	-6.70	23.60	15.57	14.73	-16.49	18.76
Moderate Aggressive Average	5.73	-1.84	7.35	18.18	-7.47	22.26	14.41	14.74	-16.82	16.29

Risk Level

Jan 19 - Dec 23

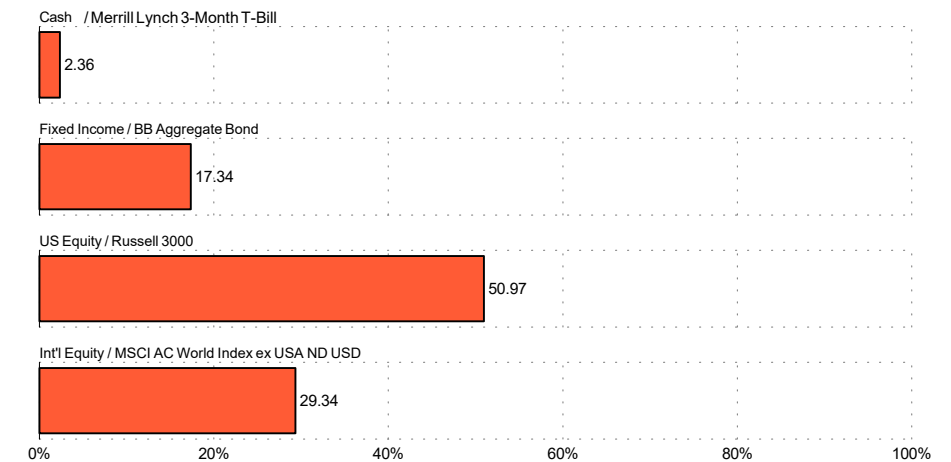


Style Diversity Criteria

Style Diversity / Benchmark

Jan 19 - Dec 23

Analysis	US Equity (%)	Int'l Equity (%)	Fixed Income (%)	Cash (%)
Conservative	5-25	0-20	40-90	0-30
Moderate Conservative	10-40	3-25	30-80	0-15
Moderate	25-60	5-30	20-60	0-10
Moderate Aggressive	40-80	10-40	5-40	0-7
Aggressive	50-90	15-45	2-25	0-5



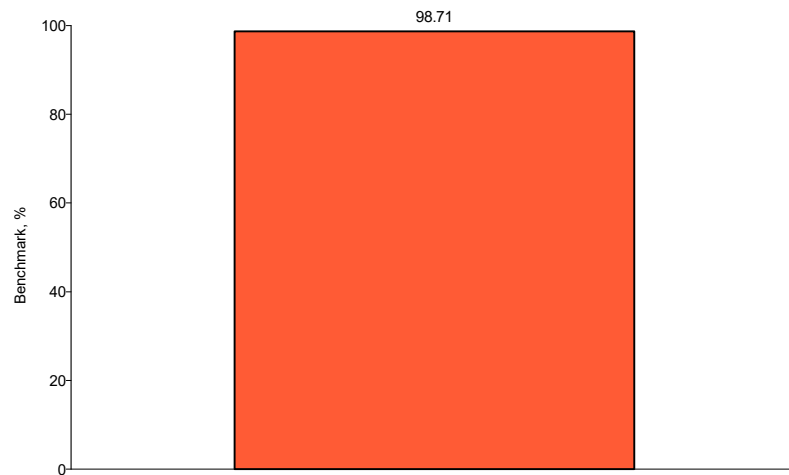
Style diversity weights determined by returns-based style analysis over five year time period.

Summary

	Standard Deviation	Downside Deviation	Excess Return	Tracking Error	Significance Level	Alpha	Beta	R ²	R ² Score
■ T. Rowe Price Spectrum Mod Gr Allc	15.23	10.02	-0.95	1.73	86.33	-0.82	0.99	98.71	1
◆ Style Benchmark	15.22	9.68	0.00	0.00	NA	0.00	1.00	100.00	

Style R-Squared

Single Computation, Jan-19 - Dec-23



Definitions

Standard Deviation- The volatility of the fund's returns.

Downside Deviation- The volatility of the funds negative returns.

Excess Return- The fund's return above the benchmark.

Tracking Error- The volatility of the fund's excess returns.

Significance Level- Measures the confidence of the fund's out/under performance.

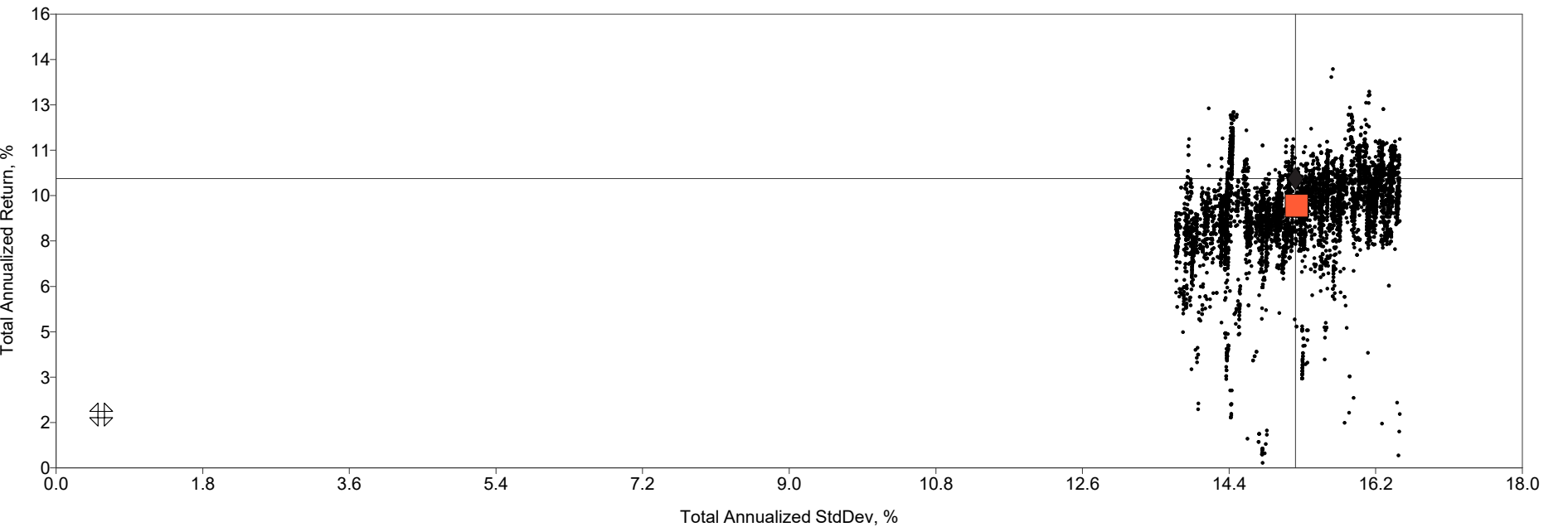
Alpha- The fund's risk adjusted excess return.

Beta- The fund's market risk/sensitivity to the style benchmark.

R-Squared- The percentage of the fund's movement that is explained by the style benchmark

Risk / Return

Single Computation, Jan 19 - Dec 23

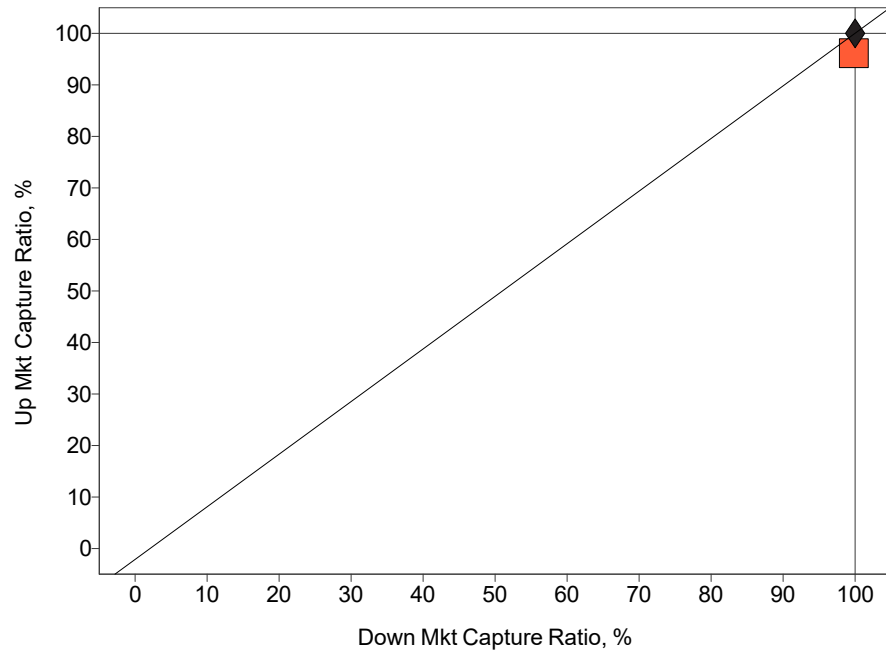


Summary Statistics

	Return (%)	Std Dev (%)	Sharpe Ratio	Risk/Return Score
■ T. Rowe Price Spectrum Mod Gr Allc	9.25	15.23	0.48	0
⌘ Cash	1.88	0.55	NA	NA
◆ Style Benchmark	10.20	15.22	0.55	

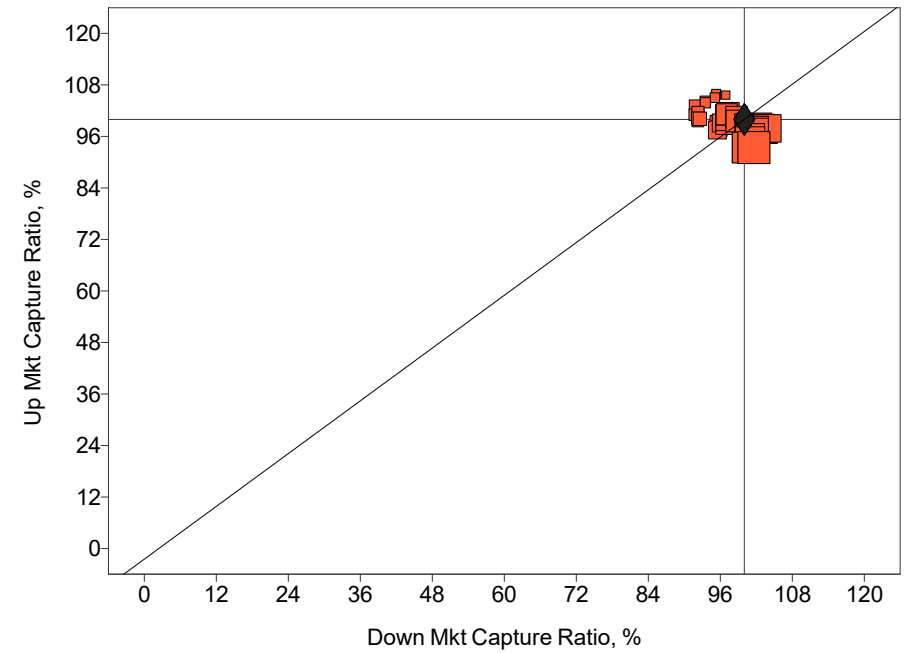
Up/Down Capture

Jan 19 - Dec 23



Rolling Up/Down Capture

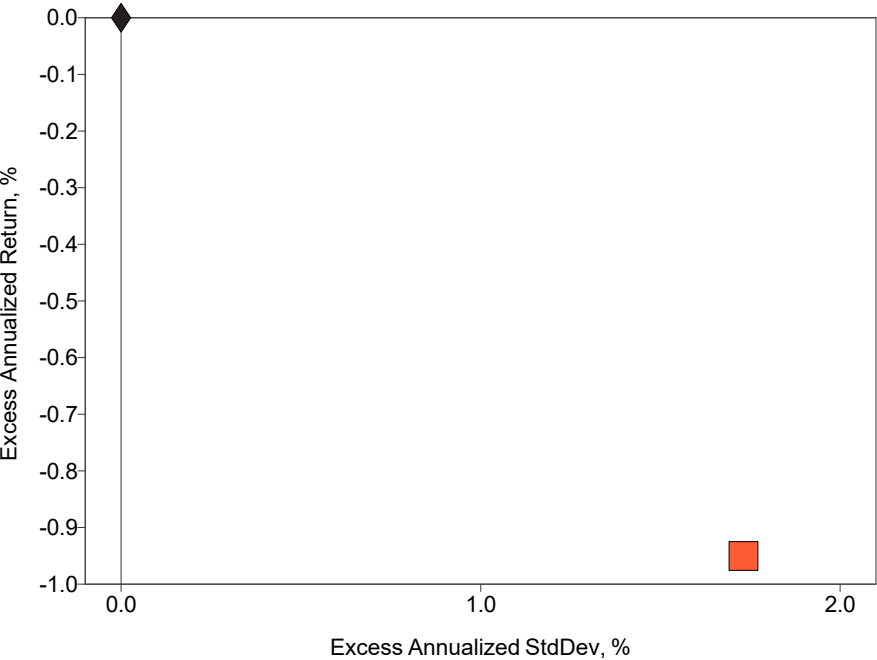
36 Month rolling windows, Jan 19 - Dec 23



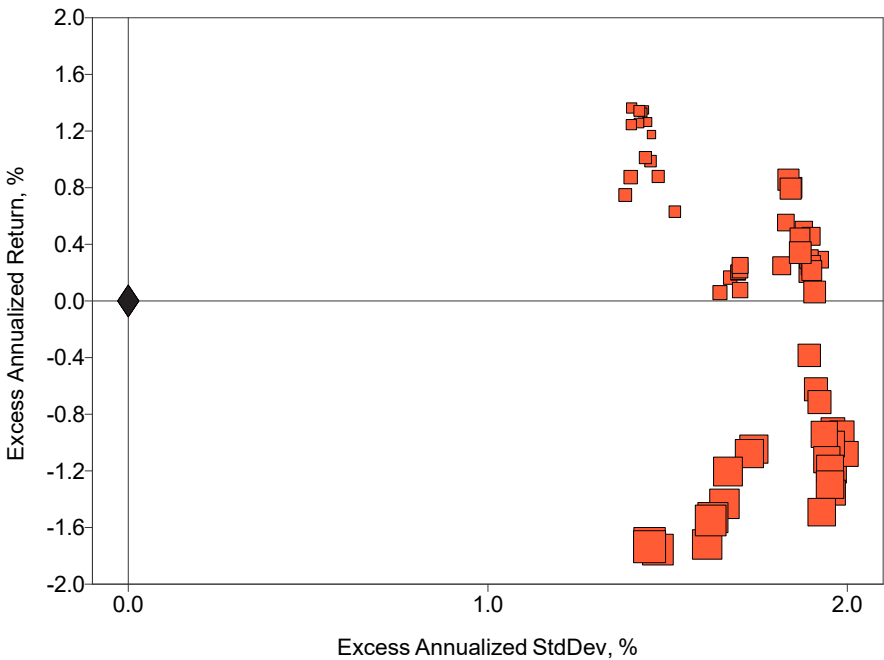
Summary Statistics

	Up Months	Down Months	Up Market Avg. Return	Down Market Avg. Return	Up Market Capture, %	Down Market Capture, %	R ²	Up/Down Score
■ T. Rowe Price Spectrum Mod Gr Allc	37	23	3.46	-3.79	96.20	99.85	98.71	0
◆ Style Benchmark	38	22	3.58	-3.79	100.00	100.00	100.00	

Relative Risk Return Jan 19 - Dec 23



Rolling Relative Risk Return 36 Month rolling windows, Jan 19 - Dec 23

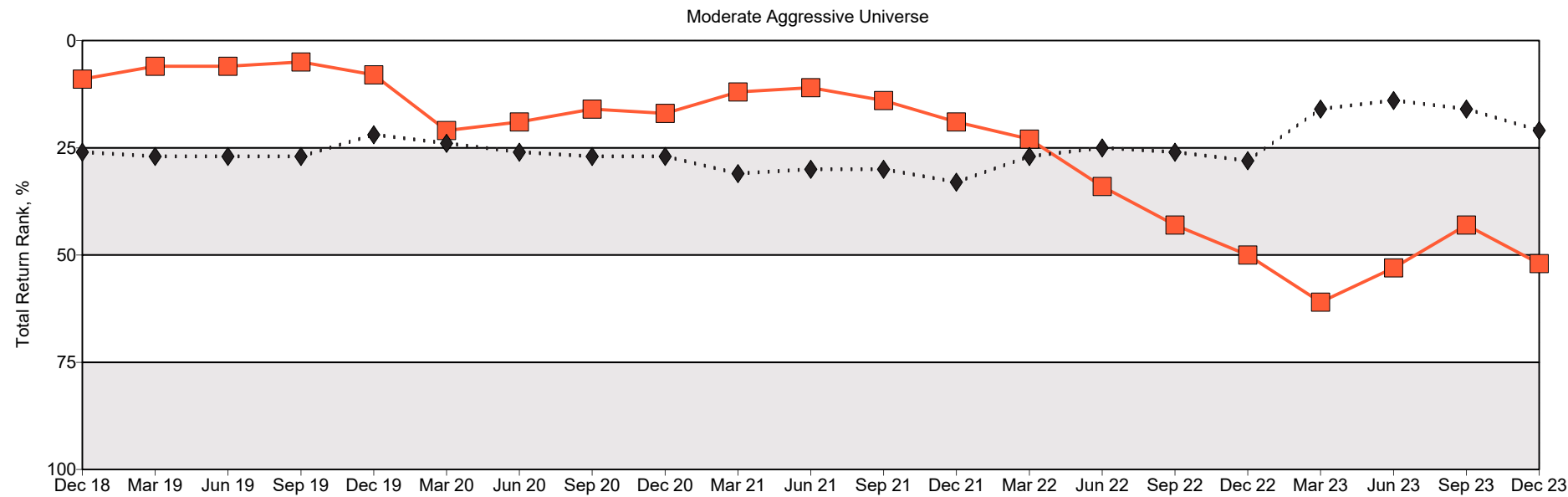


Summary Statistics

	Annualized Excess Return, %	Annualized Excess StdDev, %	Information Ratio	Significance Level, %	R ²	Info Ratio Score
■ T. Rowe Price Spectrum Mod Gr Allc	-0.95	1.73	-0.55	86.33	98.71	0

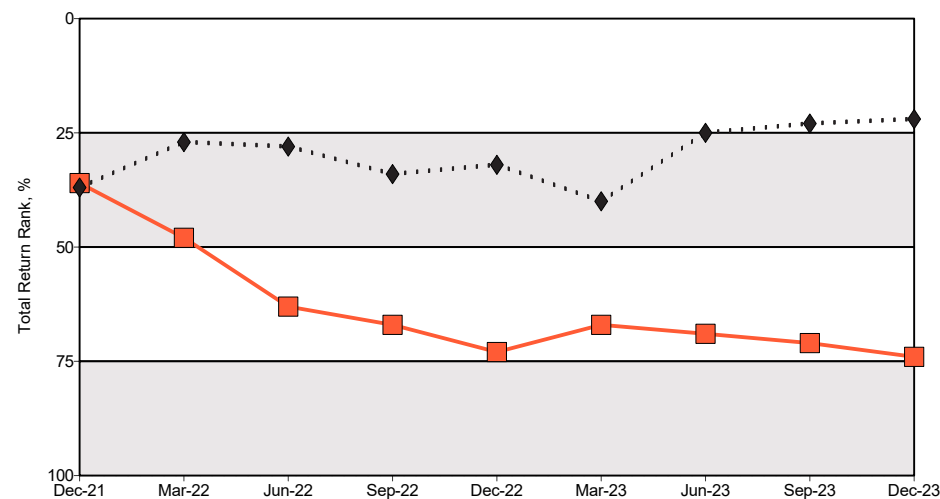
Rolling 5 Year Return Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Return Rank (5Yr Universe Size: 7839)

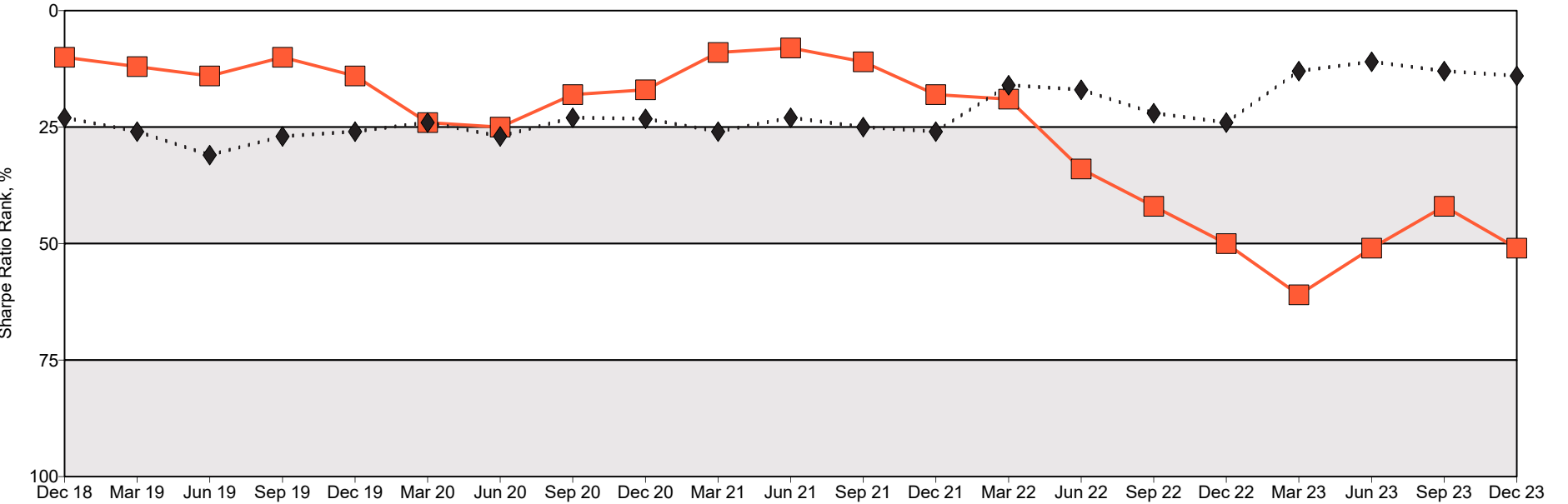
36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	Return Rank Score
T. Rowe Price Spectrum Mod Gr Allc	67.00	4.00	0
Style Benchmark	NA	NA	NA

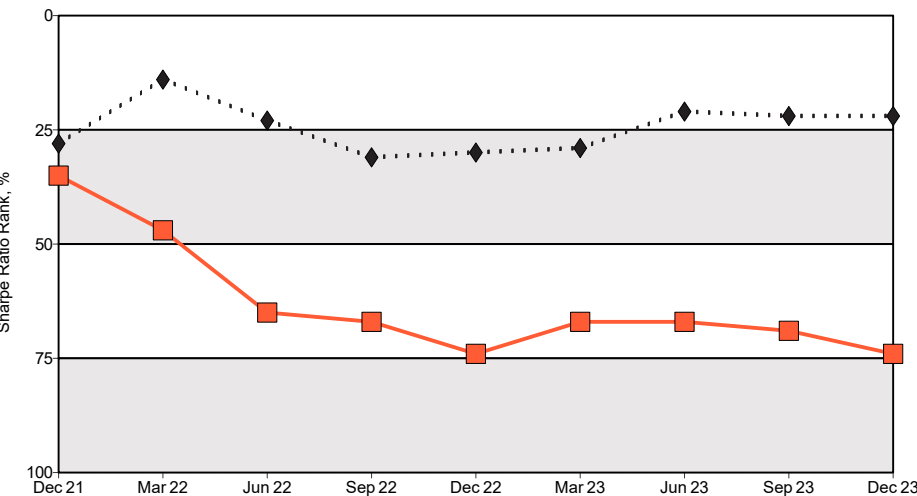
Rolling 5 Year Sharpe Ratio Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Sharpe Ratio Rank (5Yr Universe Size: 7839)

36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	SR Rank Score
T. Rowe Price Spectrum Mod Gr Allc	67.00	2.00	0
Style Benchmark	NA	NA	NA

Investment objectives and strategies vary among fund, and may not be similar for funds included in the same asset class. All definitions are typical category representations. Please note that all investments are subject to market and other risk factors, which could result in loss of principal. Fixed income securities carry interest rate risk. As interest rates rise, bond prices usually fall, and vice versa. The specific share classes or accounts identified above may not be available or chosen by the plan. Share class and account availability is unique to the client's specific circumstances. There may be multiple share classes or accounts available to the client from which to choose. All recommendations are subject to vendor/provider approval before implementation into the plan. The performance data quoted may not reflect the deduction of additional fees, if applicable. If reflected, additional fees would reduce the performance quoted. Performance data is subject to change without prior notice.

Performance of indexes reflects the unmanaged result for the market segment the selected stocks represent. Indexes are unmanaged and not available for direct investment. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index. The information used in the analysis has been taken from sources deemed to be reliable, including, third-party providers such as Markov Processes International, Morningstar, firms who manage the investments, and/or the retirement plan providers who offer the funds. Every reasonable effort has been made to ensure completeness and accuracy; however, the final accuracy of the numbers and information is the responsibility of the investment manager(s) of each fund and/or the retirement plan providers offering these funds. Discrepancies between the figures reported in this analysis, and those reported by the actual investment managers and/or retirement plan providers, may be caused by a variety of factors, including: Inaccurate reporting by the manager/provider; Changes in reporting by the manager/provider from the time this report was prepared to a subsequent retro-active audit and corrected reporting; Differences in fees and share-classes impacting net investment return; and, Scriveners error by your advisor in preparing this report.

The enclosed Investment Due Diligence report, including the Scorecard System, is intended for plan sponsor and/or institutional use only. The materials are not intended for participant use. The purpose of this report is to assist fiduciaries in selecting and monitoring investment options. A fund's score is meant to be used by the plan sponsor and/or fiduciaries as a tool for selecting the most appropriate fund. Fund scores will change as the performance of the funds change and as certain factors measured in the qualitative category change (e.g., manager tenure). Fund scores are not expected to change dramatically from each measured period, however, there is no guarantee this will be the case. Scores will change depending on the changes in the underlying pre-specified Scorecard factors.

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Mutual funds are sold by prospectus only. Before investing, investors should carefully consider the investment objectives, risks, charges and expenses of a mutual fund. The fund prospectus provides this and other important information. Please contact your Investment Advisor/Consultant or Vendor/Provider to obtain a prospectus. Please read the prospectus carefully before investing or sending money.

For a copy of the most recent prospectus, please contact your Investment Advisor/Consultant or Vendor/Provider.

Notes

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Asset Class Definition

The small cap blend asset class includes both growth and value oriented companies with market capitalizations typically between \$500 million and \$2 billion. The Russell 2000 is a sub-set of the smallest companies in the Russell 3000, which represents the 3000 largest public companies in the U.S. (the Russell 3000 is often used as a proxy for the entire U.S. equity market). The Russell 2000 Index represents approximately 10% of the entire U.S. equity market.

Investment Rank

No managers scored 9 or 10

Scorecard System

Scorecard - Active	Ticker/ ID	Style			Risk / Return			Peer Group		Qual. (2pt max)	Total Score
		Style	Style Drift	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	Info Ratio Rank		
PIMCO StocksPLUS Small Institutional	PSCSX	1	1	1	0	0	0	0	0	2	5
Calvert Small-Cap I	CSVIX	0	0	1	1	1	1	0	0	2	6

Scorecard Factors

	Style: Val/Gr	Style: Sml/Lrg	Style Drift	R ²	Risk	Return	Up Cap	Down Cap	Info Ratio	Return Rank	IR Rank	Qual. Detail	Qual. Score
PIMCO StocksPLUS Small Institutional	-5.36	-99.84	3.69	99.58	26.44	9.06	106.46	108.57	-0.33	89.00	97.00		2
Calvert Small-Cap I	-29.50	-31.29	25.48	90.38	20.08	10.35	82.36	80.93	0.05	68.00	63.00		2
<i>Russell 2000 Index</i>	<i>-0.04</i>	<i>-99.33</i>		<i>100.00</i>	<i>24.22</i>	<i>9.97</i>	<i>100.00</i>	<i>100.00</i>	<i>NA</i>				

Notes

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Summary

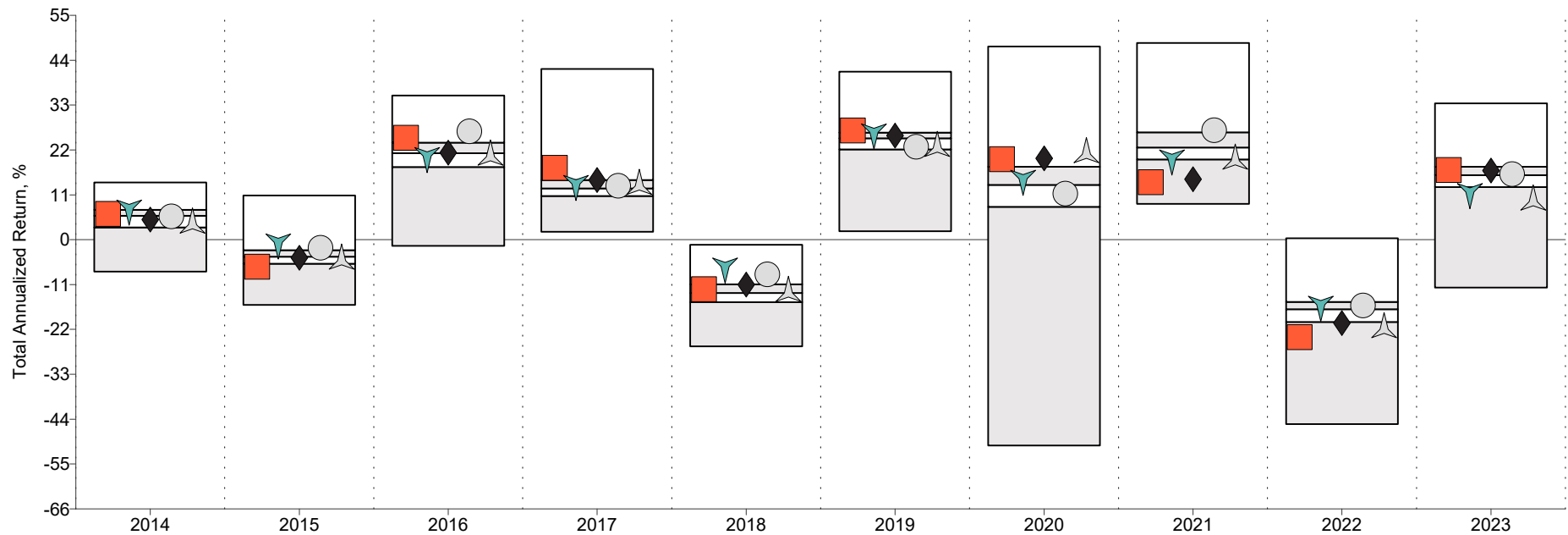
	QTR	YTD	1 Yr	3 Yr Ann.	5 Yr Ann.	10 Yr Ann.	Since Inception	Manager Tenure (Years)	Fund Inception	Net Exp. Ratio	Net Exp. Ratio Rank	Gross Exp. Ratio
PIMCO StocksPLUS Small Institutional	14.70	17.08	17.08	0.54	9.06	7.05	9.36	5.45	03/31/2006	0.75	12	0.75
Calvert Small-Cap I	11.55	11.73	11.73	4.07	10.35	8.41	8.37	7.00	10/01/2004	0.94	27	0.94
Russell 2000 Index	14.03	16.93	16.93	2.22	9.97	7.16						
S&P 600	15.12	16.05	16.05	7.28	11.03	8.66						
Russell Micro Cap Index	16.06	9.33	9.33	0.61	8.56	5.79						
Small Cap Blend Average	12.33	15.66	15.66	5.54	10.55	6.88					54	1.42

Notes

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Floating Peer Group Bar Chart

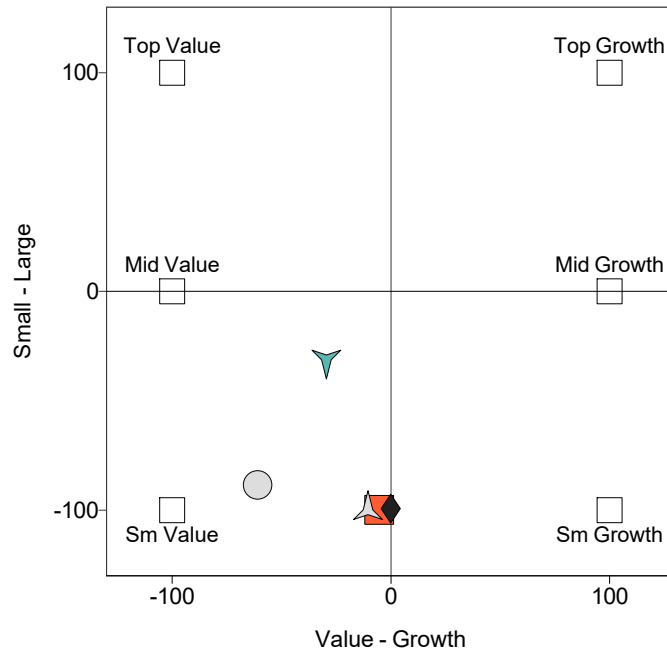


Performance Table

	2014	2015	2016	2017	2018	2019	2020	2021	2022	YTD
■ PIMCO StocksPLUS Small Institutional	6.29	-6.64	24.98	17.63	-12.16	26.76	19.76	14.08	-23.90	17.08
▼ Calvert Small-Cap I	7.64	-0.64	20.54	13.69	-6.54	26.30	14.95	19.95	-15.91	11.73
◆ Russell 2000 Index	4.89	-4.41	21.31	14.65	-11.01	25.52	19.96	14.82	-20.44	16.93
○ S&P 600	5.76	-1.97	26.56	13.23	-8.48	22.78	11.29	26.82	-16.10	16.05
△ Russell Micro Cap Index	3.65	-5.16	20.37	13.17	-13.08	22.43	20.96	19.34	-21.96	9.33
Small Cap Blend Average	5.18	-4.35	20.06	12.91	-13.11	24.72	13.02	22.94	-17.17	15.66

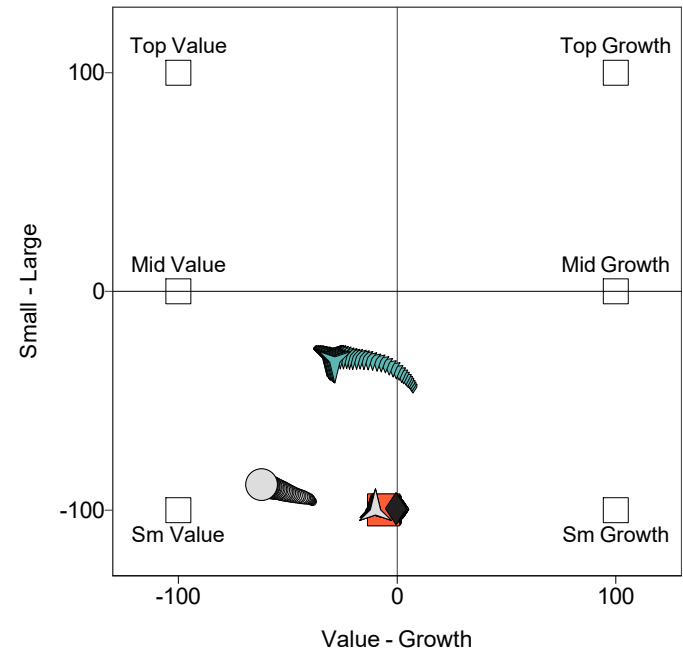
Average Style

Jan 19 - Dec 23



Style Drift

36 Month rolling windows, Jan 19 - Dec 23



Exposures

Jan 19 - Dec 23

	Asset Allocation: Russell 6 Map							Style				
	Cash	Top Value	Top Growth	Mid Value	Mid Growth	Sm Value	Sm Growth	Drift	Style: Val/Gr	Style: Sm/Lrg	Style Score	Style Drift Score
■ PIMCO StocksPLUS Small Institutional	0.00	0.00	0.00	0.00	0.16	52.68	47.16	3.69	-5.36	-99.84	1	1
▼ Calvert Small-Cap I	10.15	7.12	0.24	32.65	11.18	19.91	18.75	25.48	-29.50	-31.29	0	0
◆ Russell 2000 Index	0.00	0.01	0.10	0.45	0.00	49.56	49.88		-0.04	-99.33		
○ S&P 600	1.41	0.90	0.87	1.70	4.87	77.18	13.08		-60.96	-88.48		
△ Russell Micro Cap Index	0.12	0.00	0.00	0.00	0.00	55.14	44.73		-10.41	-99.88		

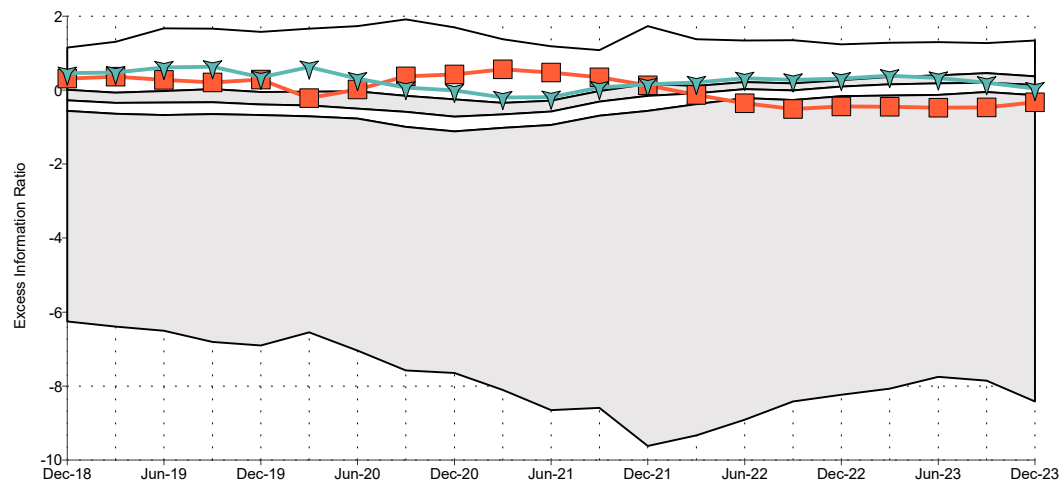
Summary

Jan 19 - Dec 23

	Standard Deviation	Downside Deviation	Excess Return	Tracking Error	Significance Level	Alpha	Beta	R ²	R ² Score
■ PIMCO StocksPLUS Small Institutional	26.44	17.60	-0.91	2.76	72.20	-1.18	1.09	99.58	1
▼ Calvert Small-Cap I	20.08	12.56	0.38	8.07	53.76	1.65	0.79	90.38	1
◆ Russell 2000 Index	24.22	15.65	0.00	0.00	NA	0.00	1.00	100.00	

Rolling 5 Yr Information Ratio

20 quarter rolling windows, Jan 14 - Dec 23



Definitions

Standard Deviation- The volatility of the fund's returns.

Downside Deviation- The volatility of the funds negative returns.

Excess Return- The fund's return above the benchmark.

Tracking Error- The volatility of the fund's excess returns.

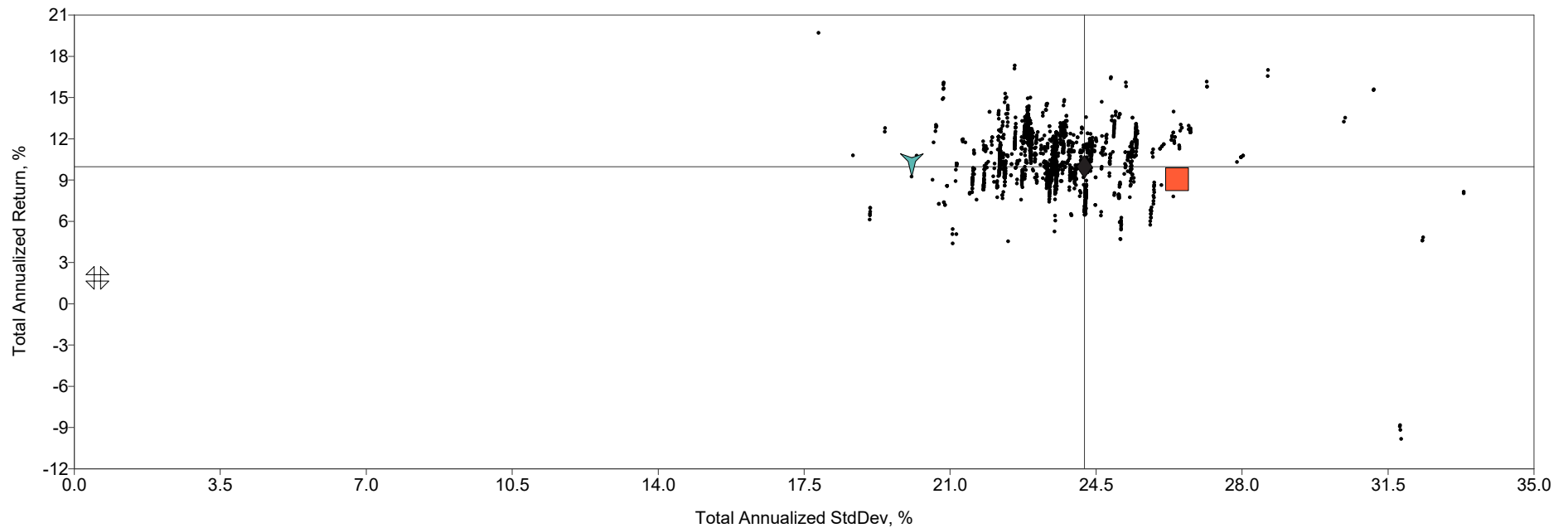
Significance Level- Measures the confidence of the fund's out/under performance.

Alpha- The fund's risk adjusted excess return.

Beta- The fund's market risk/sensitivity to the market (benchmark).

Risk / Return

Single Computation, Jan 19 - Dec 23



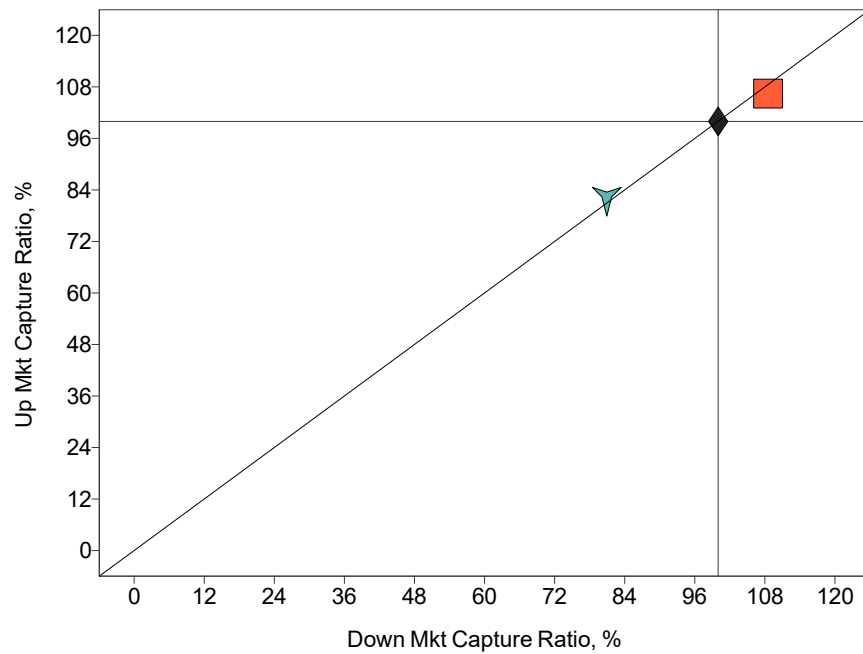
Summary Statistics

Jan 19 - Dec 23

	Return (%)	Std Dev (%)	Sharpe Ratio	Risk/Return Score
■ PIMCO StocksPLUS Small Institutional	9.06	26.44	0.27	0
▼ Calvert Small-Cap I	10.35	20.08	0.42	1
⌘ Cash	1.88	0.55	NA	NA
◆ Russell 2000 Index	9.97	24.22	0.33	

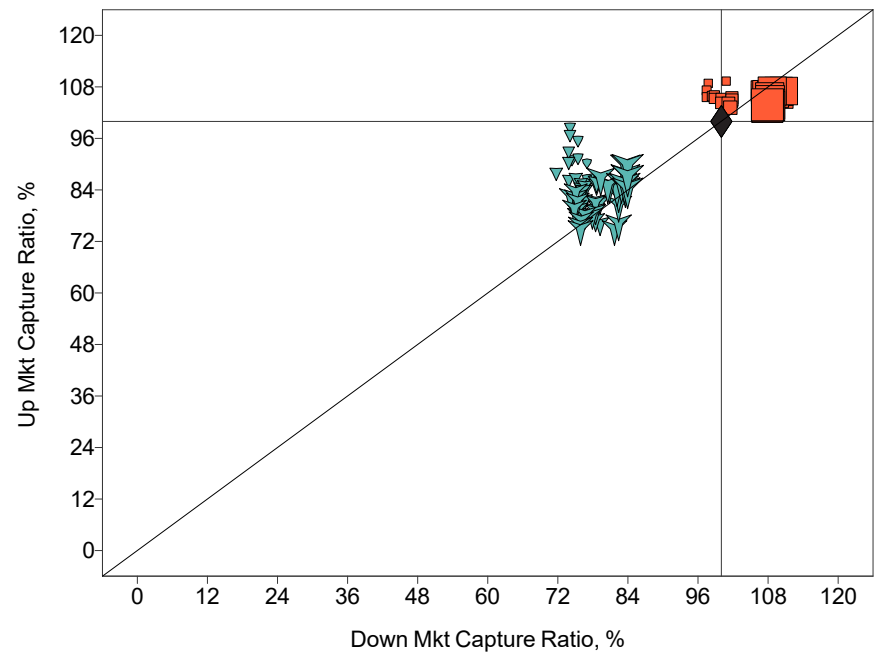
Up/Down Capture

Jan 19 - Dec 23



Rolling Up/Down Capture

36 Month rolling windows, Jan 19 - Dec 23



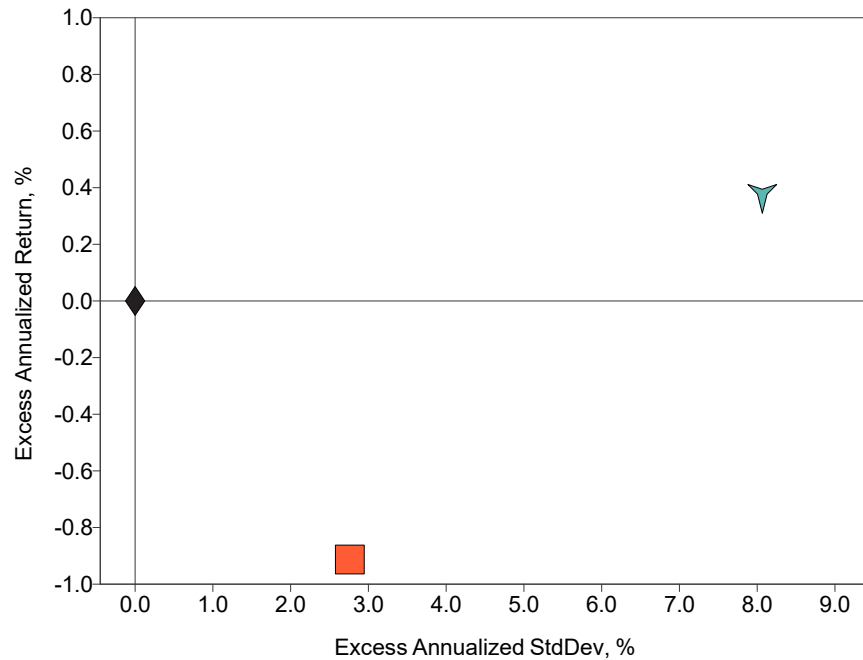
Summary Statistics

Jan 19 - Dec 23

	Up Months	Down Months	Up Market Avg. Return	Down Market Avg. Return	Up Market Capture, %	Down Market Capture, %	R ²	Up/Down Score
■ PIMCO StocksPLUS Small Institutional	37	23	5.54	-6.56	106.46	108.57	99.58	0
▼ Calvert Small-Cap I	35	25	4.44	-4.73	82.36	80.93	90.38	1
◆ Russell 2000 Index	37	23	5.25	-5.98	100.00	100.00	100.00	

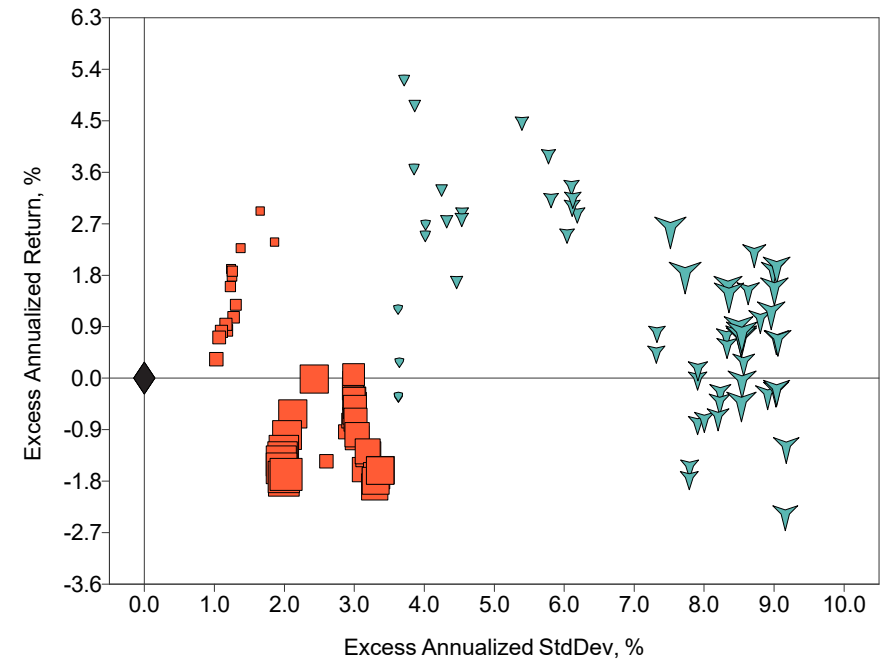
Relative Risk Return

Jan 19 - Dec 23



Rolling Relative Risk Return

36 Month rolling windows, Jan 19 - Dec 23



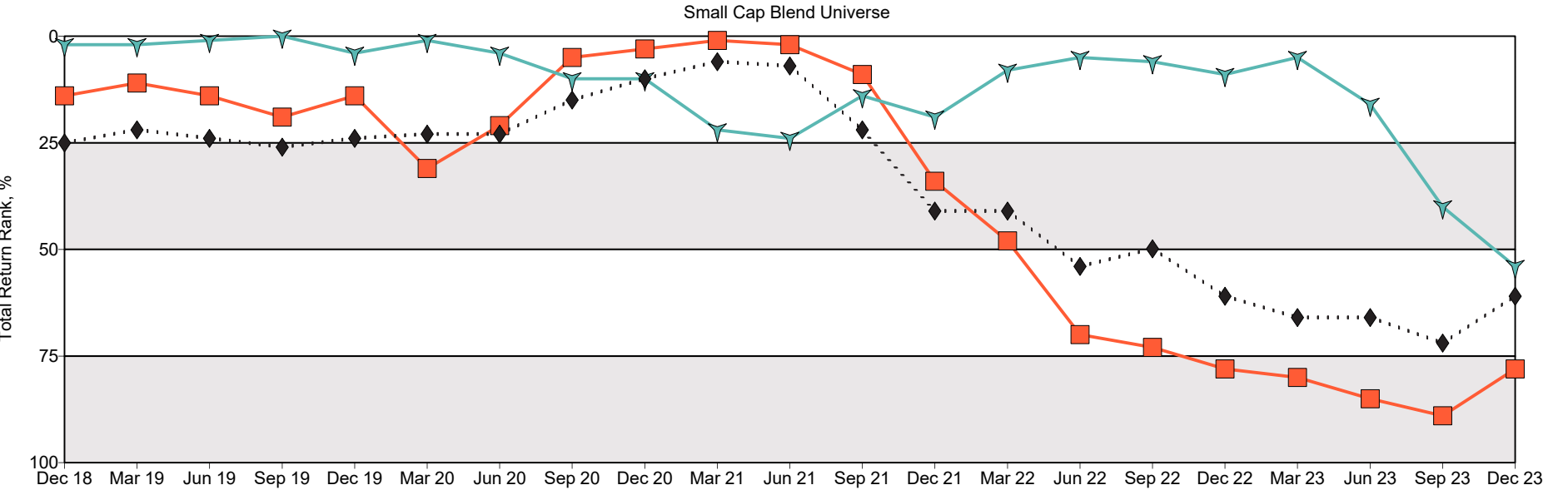
Summary Statistics

Jan 19 - Dec 23

	Annualized Excess Return, %	Annualized Excess StdDev, %	Information Ratio	Significance Level, %	R ²	Info Ratio Score
■ PIMCO StocksPLUS Small Institutional	-0.91	2.76	-0.33	72.20	99.58	0
▼ Calvert Small-Cap I	0.38	8.07	0.05	53.76	90.38	1

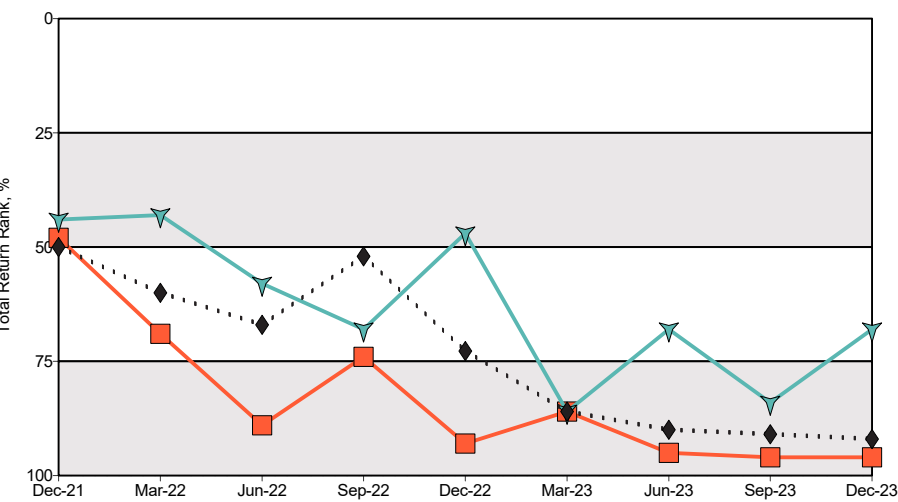
Rolling 5 Year Return Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Return Rank (5Yr Universe Size: 2326)

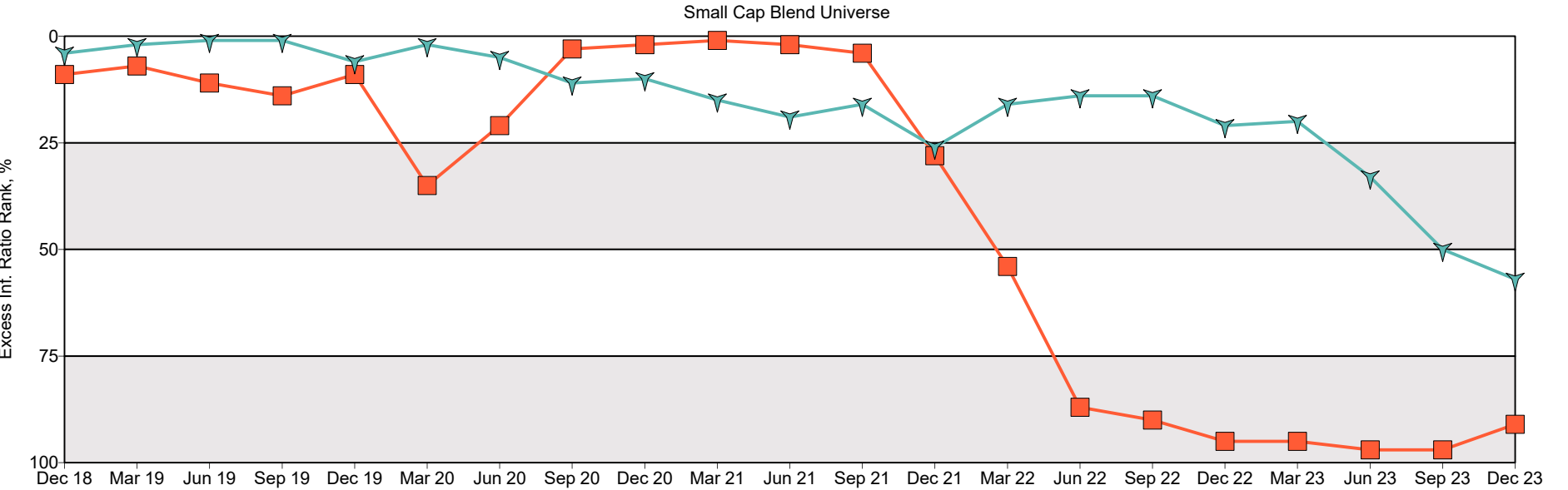
36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	Return Rank Score
PIMCO StocksPLUS Small Institutional	89.0	7.0	0
Calvert Small-Cap I	68.0	16.0	0
Russell 2000 Index	NA	NA	NA

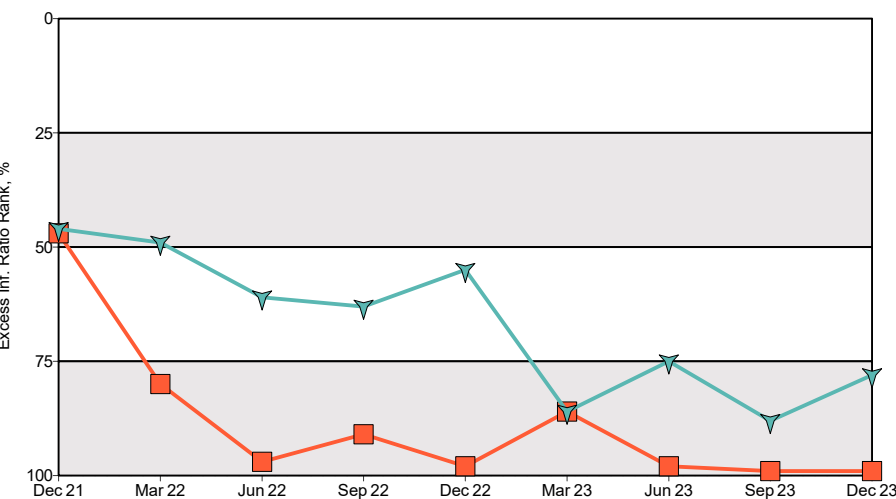
Rolling 5 Year Information Ratio Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Information Ratio Rank (5Yr Universe Size: 2326)

36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	IR Rank Score
PIMCO StocksPLUS Small Institutional	97.0	2.0	0
Calvert Small-Cap I	63.0	14.0	0

Asset Class Definition

The small cap blend (passive) asset class includes both growth and value oriented companies with market capitalizations typically between \$500 million and \$2 billion. The Russell 2000 is a sub-set of the smallest companies in the Russell 3000, which represents the 3000 largest public companies in the U.S. (the Russell 3000 is often used as a proxy for the entire U.S. equity market). The Russell 2000 Index represents approximately 10% of the entire U.S. equity market.

Investment Rank

Top Ranked Passive Funds:
1. Fidelity Small Cap Index

Scorecard System

Scorecard - Passive	Ticker/ ID	Style				Peer Group				Qual. (2pt max)	Total Score
		Style	Style Drift	R ²	TE	TE Rank	Expense Rank	Return Rank	SR Rank		
Fidelity Small Cap Index	FSSNX	1	1	1	1	1	1	1	1	2	10

Scorecard Factors

	Style: Val/Gr	Style: Sml/Lrg	Style Drift	R ²	TE	TE Rank	Expense Rank	Return Rank	SR Rank	Qual. Detail	Qual. Score
Fidelity Small Cap Index	-1.48	-99.23	0.50	100.00	0.10	34.00	5.00	46.00	46.00		2
Russell 2000 Index	-1.29	-99.26		100.00	0.00						

Notes

1. All statistics calculated over a three year time period.
2. Style analytics reflect the parameters on a returns-based style map (on a scale of 100 to -100 for each axis.) Fund passes if it plots out in the appropriate section of the style map, representing the fund's stated style.
3. Style drift is measured by the style drift score, which is a statistic measuring the rolling style-based analysis for a fund.
4. R-squared measures the percentage of the fund's movement that is explained by the fund's benchmark (market).
5. Tracking error (TE) measures the fund's total annualized excess (return) standard deviation.
6. Peer group ranking statistics measure the fund's 3 year rank.
7. Qualitative Detail: E = Expenses (qualitative score impacted negatively due to fund's higher expense ratio); and S = Statistics (qualitative score impacted negatively due to weak/poor strength of statistics and tracking).

Summary

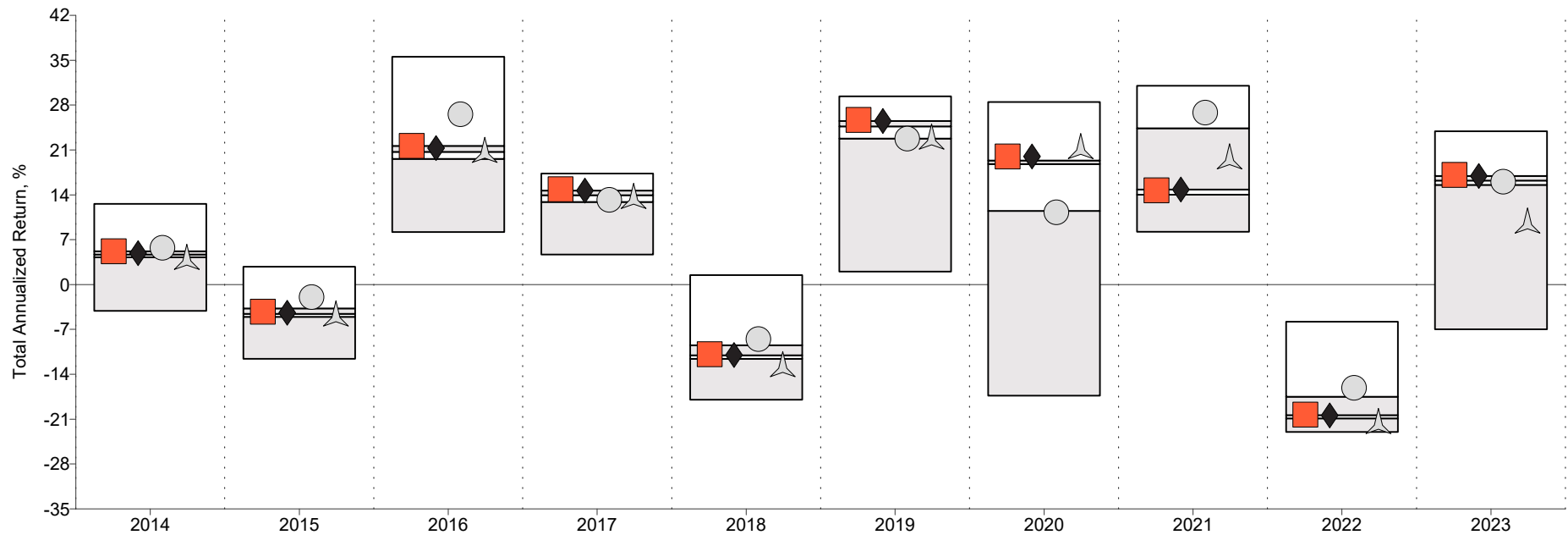
	QTR	YTD	1 Yr	3 Yr Ann.	5 Yr Ann.	10 Yr Ann.	Since Inception	Manager Tenure (Years)	Fund Inception	Net Exp. Ratio	Gross Exp. Ratio
Fidelity Small Cap Index	14.05	17.12	17.12	2.32	10.07	7.32	10.73	12.32	09/08/2011	0.03	0.03
Russell 2000 Index	14.03	16.93	16.93	2.22	9.97	7.16					
S&P 600	15.12	16.05	16.05	7.28	11.03	8.66					
Russell Micro Cap Index	16.06	9.33	9.33	0.61	8.56	5.79					
Small Cap Blend Passive Average	13.93	16.13	16.13	3.37	9.82	7.01				0.67	0.70

Notes

1. Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted.
2. The performance data quoted may not reflect the deduction of additional fees, if applicable. Additional fees would reduce the performance quoted.
3. Performance data is subject to change without prior notice.

Contact Accelerate Retirement- Lloyd Engleman with any questions about this report or for the most current month-end performance at .

Floating Peer Group Bar Chart

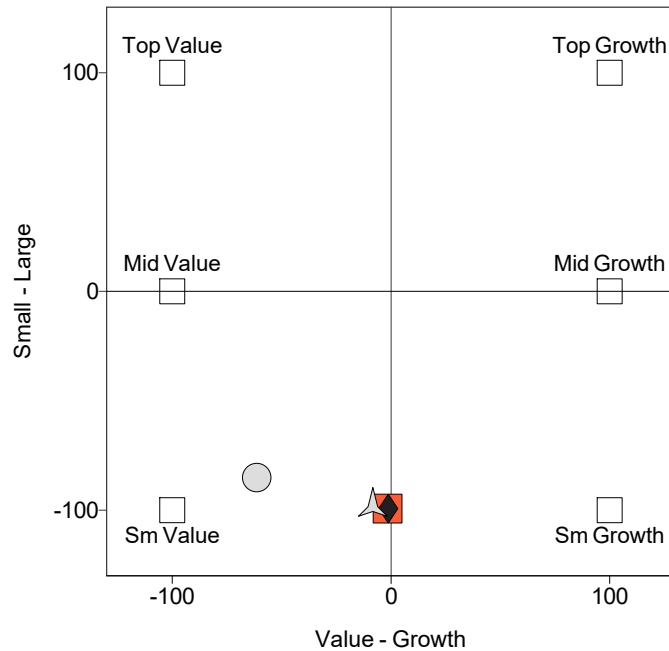


Performance Table

	2014	2015	2016	2017	2018	2019	2020	2021	2022	YTD
■ Fidelity Small Cap Index	5.19	-4.24	21.63	14.85	-10.88	25.71	19.99	14.71	-20.27	17.12
◆ Russell 2000 Index	4.89	-4.41	21.31	14.65	-11.01	25.52	19.96	14.82	-20.44	16.93
○ S&P 600	5.76	-1.97	26.56	13.23	-8.48	22.78	11.29	26.82	-16.10	16.05
△ Russell Micro Cap Index	3.65	-5.16	20.37	13.17	-13.08	22.43	20.96	19.34	-21.96	9.33
Small Cap Blend Passive Average	4.86	-4.38	21.22	13.75	-10.67	24.24	16.68	17.76	-19.18	16.13

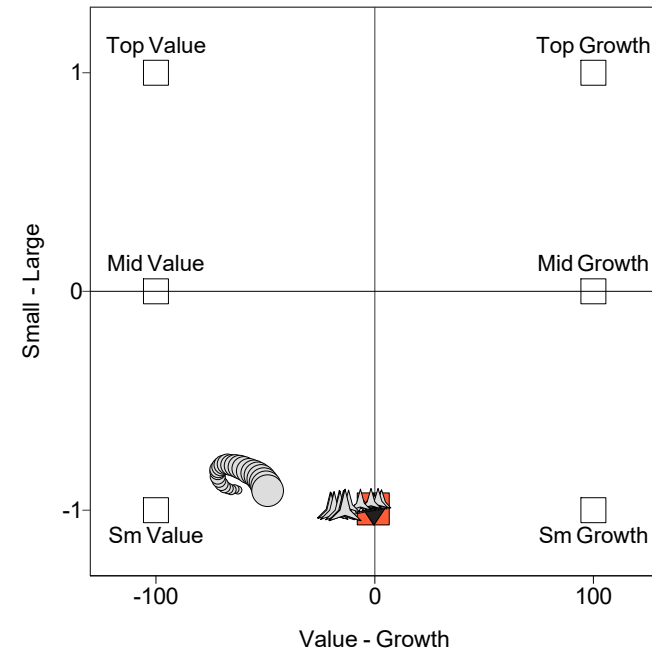
Average Style

Jan-21 - Dec-23



Style Drift

24 Month rolling window Jan-21 - Dec-23



Exposures

Jan-21 - Dec-23

	Asset Allocation: Russell 6 Map							Style				
	Cash	Top Value	Top Growth	Mid Value	Mid Growth	Sm Value	Sm Growth	Drift	Style: Val/Gr	Style: Sml/Lrg	Style Score	Style Drift Score
■ Fidelity Small Cap Index	0.00	0.00	0.26	0.25	0.00	50.49	49.00	0.50	-1.48	-99.23	1	1
◆ Russell 2000 Index	0.00	0.00	0.22	0.30	0.00	50.34	49.14		-1.29	-99.26		
○ S&P 600	0.70	1.08	0.15	2.08	9.66	77.19	9.15		-61.38	-85.11		
△ Russell Micro Cap Index	1.65	0.00	0.00	0.00	0.00	53.34	45.01		-8.32	-98.35		

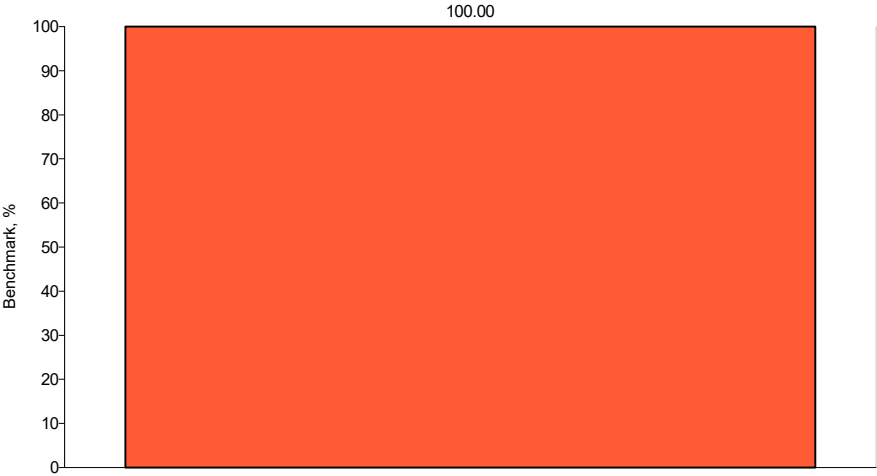
Summary

Jan-21 - Dec-23

	Standard Deviation	Downside Deviation	Excess Return	Alpha	Beta	R ²	TE	R ² Score	TE Score
■ Fidelity Small Cap Index	21.41	13.78	0.09	0.09	1.00	100.00	0.10	1	1
◆ Russell 2000 Index	21.41	13.81	0.00	0.00	1.00	100.00	0.00		

R-Squared

Jan-21 - Dec-23



Definitions

- Standard Deviation- The volatility of the fund's returns.
- Downside Deviation- The volatility of the funds negative returns.
- Excess Return- The fund's return above the benchmark.
- Tracking Error- The volatility of the fund's excess returns.
- Alpha- The fund's risk adjusted excess return.
- Beta- The fund's market risk/sensitivity to the market (benchmark).
- R-Squared- The percentage of the fund's movement that is explained by the market (benchmark)



Summary Statistics (3Yr Universe Size: 806)

Jan-21 - Dec-23

	Tracking		Expense		Return		Sharpe	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
<div>■ Fidelity Small Cap Index</div>	34	1	5	1	46	1	46	1

Investment objectives and strategies vary among fund, and may not be similar for funds included in the same asset class. All definitions are typical category representations. Please note that all investments are subject to market and other risk factors, which could result in loss of principal. Fixed income securities carry interest rate risk. As interest rates rise, bond prices usually fall, and vice versa. The specific share classes or accounts identified above may not be available or chosen by the plan. Share class and account availability is unique to the client's specific circumstances. There may be multiple share classes or accounts available to the client from which to choose. All recommendations are subject to vendor/provider approval before implementation into the plan. The performance data quoted may not reflect the deduction of additional fees, if applicable. If reflected, additional fees would reduce the performance quoted. Performance data is subject to change without prior notice.

Performance of indexes reflects the unmanaged result for the market segment the selected stocks represent. Indexes are unmanaged and not available for direct investment. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index. The information used in the analysis has been taken from sources deemed to be reliable, including, third-party providers such as Markov Processes International, Morningstar, firms who manage the investments, and/or the retirement plan providers who offer the funds. Every reasonable effort has been made to ensure completeness and accuracy; however, the final accuracy of the numbers and information is the responsibility of the investment manager(s) of each fund and/or the retirement plan providers offering these funds. Discrepancies between the figures reported in this analysis, and those reported by the actual investment managers and/or retirement plan providers, may be caused by a variety of factors, including: Inaccurate reporting by the manager/provider; Changes in reporting by the manager/provider from the time this report was prepared to a subsequent retro-active audit and corrected reporting; Differences in fees and share-classes impacting net investment return; and, Scriveners error by your advisor in preparing this report.

The enclosed Investment Due Diligence report, including the Scorecard System, is intended for plan sponsor and/or institutional use only. The materials are not intended for participant use. The purpose of this report is to assist fiduciaries in selecting and monitoring investment options. A fund's score is meant to be used by the plan sponsor and/or fiduciaries as a tool for selecting the most appropriate fund. Fund scores will change as the performance of the funds change and as certain factors measured in the qualitative category change (e.g., manager tenure). Fund scores are not expected to change dramatically from each measured period, however, there is no guarantee this will be the case. Scores will change depending on the changes in the underlying pre-specified Scorecard factors.

Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted. Likewise, a fund's score using the Scorecard System does not guarantee the future performance or style consistency of a fund. This report was prepared with the belief that this information is relevant to the plan sponsor as the plan sponsor makes investment selections. Fund selection is at the discretion of the investment fiduciaries, which are either the plan sponsor or the committee appointed to perform that function. Cash Equivalents (e.g., money market fund) and some specialty funds are not scored by the Scorecard System. The enclosed Investment Due Diligence report and Scorecard is not an offer to sell mutual funds. An offer to sell may be made only after the client has received and read the appropriate prospectus. For the most current month-end performance, please contact your advisor. The Strategy Review notes section is for informational purposes only. The views expressed here are those of your advisor and do not constitute an offer to sell an investment. An offer to sell may be made only after the client has received and read the appropriate prospectus.

Mutual funds are sold by prospectus only. Before investing, investors should carefully consider the investment objectives, risks, charges and expenses of a mutual fund. The fund prospectus provides this and other important information. Please contact your Investment Advisor/Consultant or Vendor/Provider to obtain a prospectus. Please read the prospectus carefully before investing or sending money.

For a copy of the most recent prospectus, please contact your Investment Advisor/Consultant or Vendor/Provider.

Notes

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6. Up/Down capture statistics measure the percentage of performance the fund/strategy is capturing versus the benchmark (market).
7. Information Ratio is a risk adjusted performance statistic measuring relative return over relative risk.
8. Peer group ranking statistics measure the funds median rank versus the applicable peer group universe.
9. Qualitative Detail: T = Tenure (qualitative score impacted negatively due to low manager tenure); E = Expenses (qualitative score impacted negatively due to higher than average expense ratio); and S = Statistics (qualitative score impacted negatively due to weak/poor strength of statistics).

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Asset Class Definition

The international large cap value asset class is a sub-set of the international equity asset class and represents value oriented companies outside of the U.S. with market capitalizations typically over \$10 billion. International equity represents a broad range of equity securities across developed countries throughout the world excluding the U.S. and Canada. Value securities have relatively low price to book values and lower forecasted long term growth rates. The MSCI EAFE Value Index is used as the benchmark for this asset class and represents over 500 large capitalization companies in 22 developed countries spread across Europe, Australia and Asia.

Investment Rank

Top Ranked:
1. American Beacon International Eq R5

Scorecard System

Scorecard - Active	Ticker/ ID	Style			Risk / Return			Peer Group		Qual. (2pt max)	Total Score
		Style	Style Drift	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	Info Ratio Rank		
American Beacon International Eq R5	AAIEX	1	1	1	1	1	1	0	1	2	9

Scorecard Factors

	Style: Val/Gr	Style: Sml/Lrg	Style Drift	R ²	Risk	Return	Up Cap	Down Cap	Info Ratio	Return Rank	IR Rank	Qual. Detail	Qual. Score
American Beacon International Eq R5	-65.56	89.51	19.36	95.53	21.53	7.64	109.04	108.91	0.01	52.00	42.00		2
<i>MSCI EAFE Large Value ND USD</i>	<i>-100.00</i>	<i>98.28</i>		<i>100.00</i>	<i>19.38</i>	<i>7.58</i>	<i>100.00</i>	<i>100.00</i>	<i>NA</i>				

Notes

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Summary

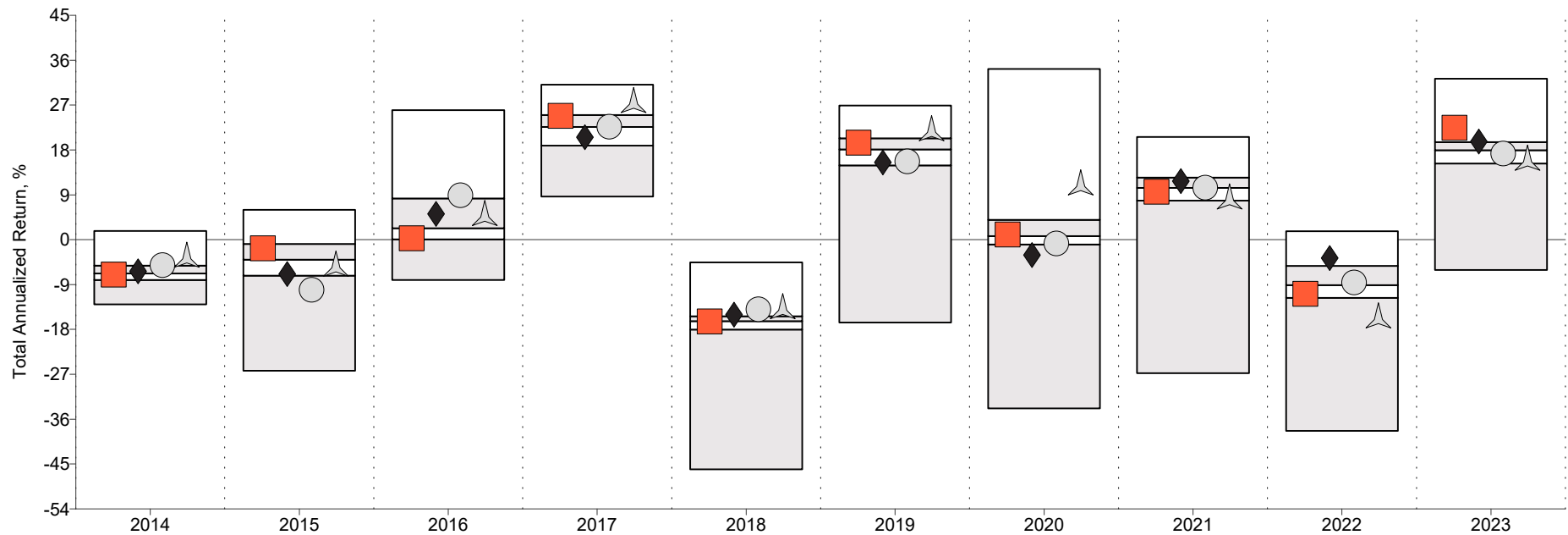
	QTR	YTD	1 Yr	3 Yr Ann.	5 Yr Ann.	10 Yr Ann.	Since Inception	Manager Tenure (Years)	Fund Inception	Net Exp. Ratio	Net Exp. Ratio Rank	Gross Exp. Ratio
American Beacon International Eq R5	9.61	22.46	22.46	6.17	7.64	3.29	6.75	29.86	08/07/1991	0.72	13	0.72
MSCI EAFE Large Value ND USD	8.02	19.67	19.67	8.80	7.58	3.08						
ACWI ex USA Value NR	8.43	17.30	17.30	5.80	6.34	2.92						
ACWI exUSA NR	9.75	15.62	15.62	1.55	7.08	3.83						
International Large Cap Value Average	8.28	17.60	17.60	5.60	6.97	2.79					55	1.40

Notes

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2. The performance data quoted may not reflect the deduction of additional fees, if applicable. Additional fees would reduce the performance quoted.
3. Performance data is subject to change without prior notice.
4. The gross expense ratio reflects the total expenses an investor/ participant may pay if current fee waivers and/ or fee reimbursements are not continued.
5. Contact RPAG with any questions about this report or for the most current month-end performance at (877)-360-2480.

Contact Accelerate Retirement- Lloyd Engleman with any questions about this report or for the most current month-end performance at .

Floating Peer Group Bar Chart

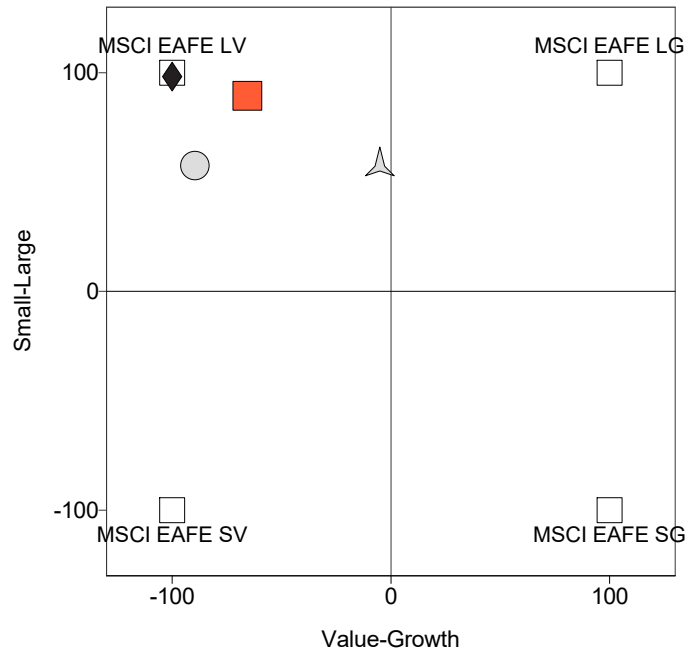


Performance Table

	2014	2015	2016	2017	2018	2019	2020	2021	2022	YTD
■ American Beacon International Eq R5	-7.02	-1.75	0.27	24.83	-16.37	19.45	1.06	9.63	-10.85	22.46
◆ MSCI EAFE Large Value ND USD	-6.34	-6.89	5.19	20.54	-15.02	15.50	-3.10	11.75	-3.71	19.67
○ ACWI ex USA Value NR	-5.10	-10.06	8.92	22.66	-13.97	15.71	-0.77	10.46	-8.59	17.30
△ ACWI exUSA NR	-3.87	-5.66	4.50	27.19	-14.20	21.51	10.65	7.82	-16.00	15.62
International Large Cap Value Average	-6.74	-4.06	3.93	22.01	-16.72	17.53	1.34	10.16	-8.97	17.60

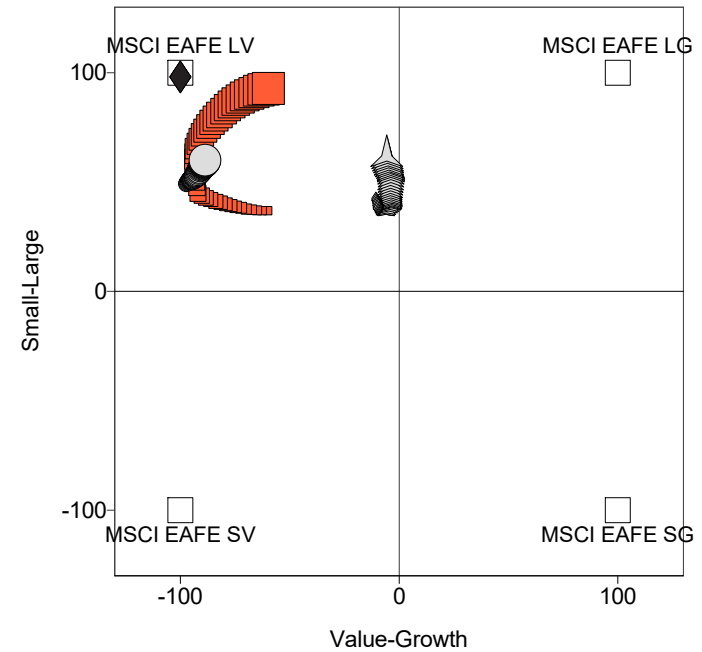
Average Style

Jan 19 - Dec 23



Style Drift

36 Month rolling windows, Jan 19 - Dec 23



Exposures

Jan 19 - Dec 23

	Asset Allocation: MSCI EAFE Map					Style				
	Cash	MSCI EAFE LV	MSCI EAFE LG	MSCI EAFE SG	MSCI EAFE SV	Drift	Style: Val/Gr	Style: Sml/Lrg	Style Score	Style Drift Score
■ American Beacon International Eq R5	0.00	77.66	17.10	0.12	5.12	19.36	-65.56	89.51	1	1
◆ MSCI EAFE Large Value ND USD	0.00	99.14	0.00	0.00	0.86		-100.00	98.28		
○ ACWI ex USA Value NR	4.55	73.59	2.90	0.00	18.96		-89.65	57.54		
△ ACWI exUSA NR	5.94	41.09	34.59	9.93	8.44		-5.01	57.31		

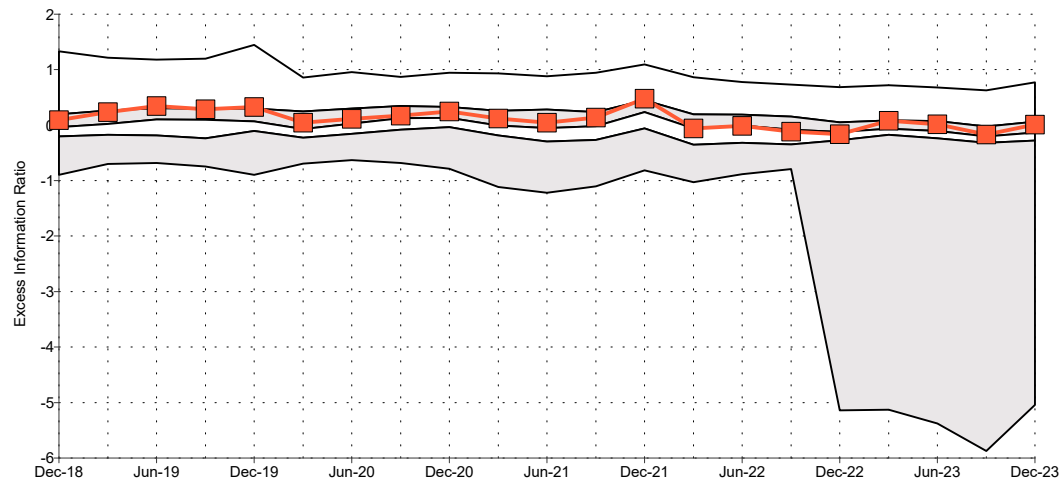
Summary

Jan 19 - Dec 23

	Standard Deviation	Downside Deviation	Excess Return	Tracking Error	Significance Level	Alpha	Beta	R ²	R ² Score
■ American Beacon International Eq R5	21.53	13.73	0.05	4.84	50.90	-0.16	1.09	95.53	1
◆ MSCI EAFE Large Value ND USD	19.38	12.69	0.00	0.00	NA	0.00	1.00	100.00	

Rolling 5 Yr Information Ratio

20 quarter rolling windows, Jan 14 - Dec 23



Definitions

Standard Deviation- The volatility of the fund's returns.

Downside Deviation- The volatility of the funds negative returns.

Excess Return- The fund's return above the benchmark.

Tracking Error- The volatility of the fund's excess returns.

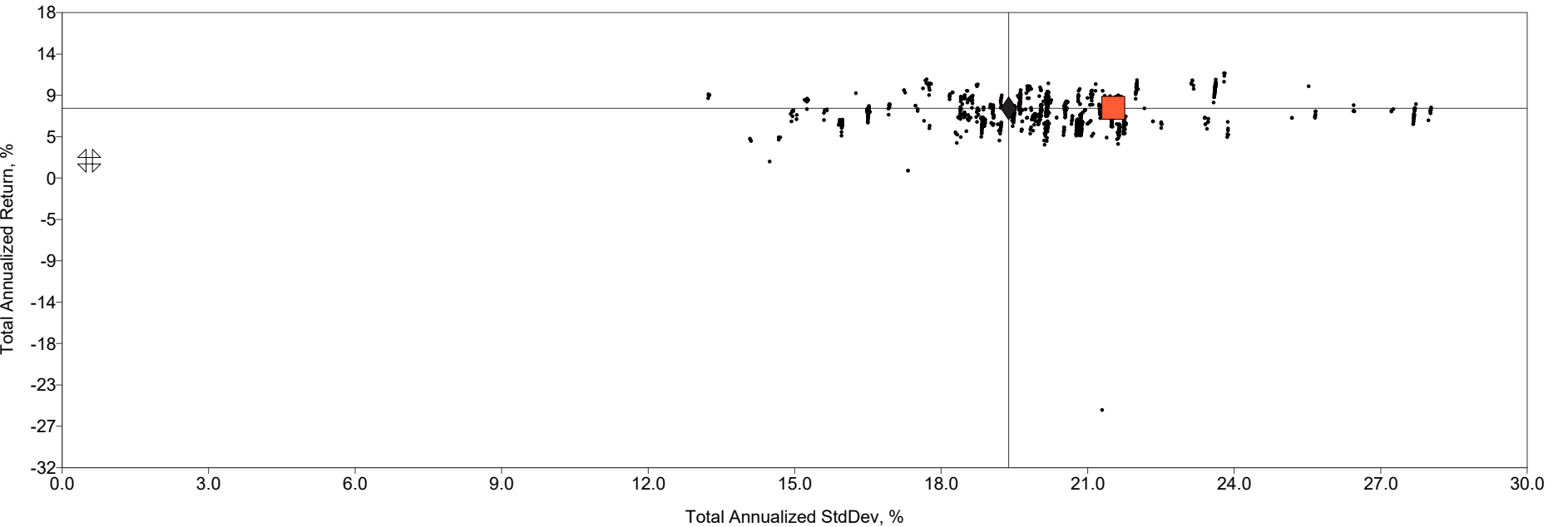
Significance Level- Measures the confidence of the fund's out/under performance.

Alpha- The fund's risk adjusted excess return.

Beta- The fund's market risk/sensitivity to the market (benchmark).

Risk / Return

Single Computation, Jan 19 - Dec 23



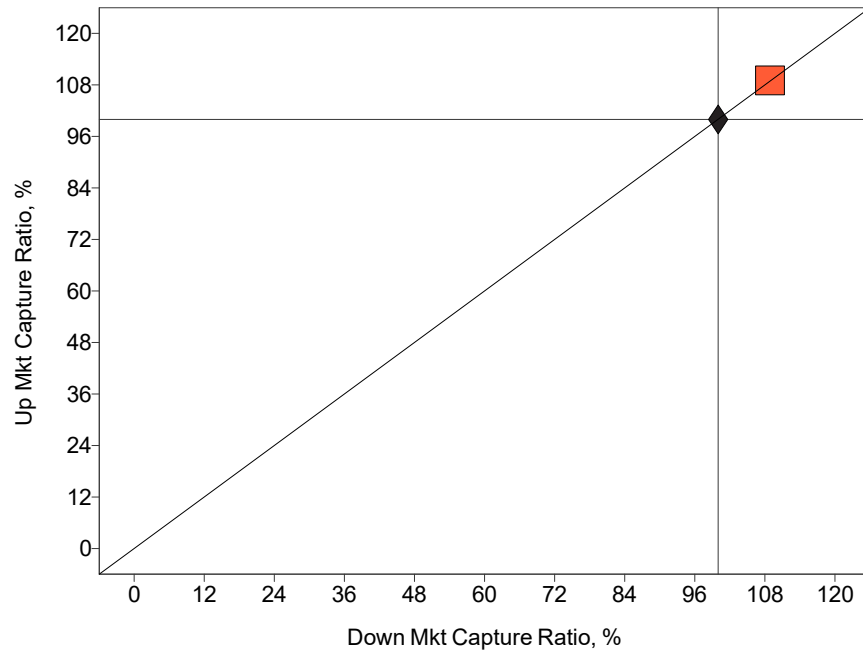
Summary Statistics

Jan 19 - Dec 23

	Return (%)	Std Dev (%)	Sharpe Ratio	Risk/Return Score
■ American Beacon International Eq R5	7.64	21.53	0.27	1
⌕ Cash	1.88	0.55	NA	NA
◆ MSCI EAFE Large Value ND USD	7.58	19.38	0.29	

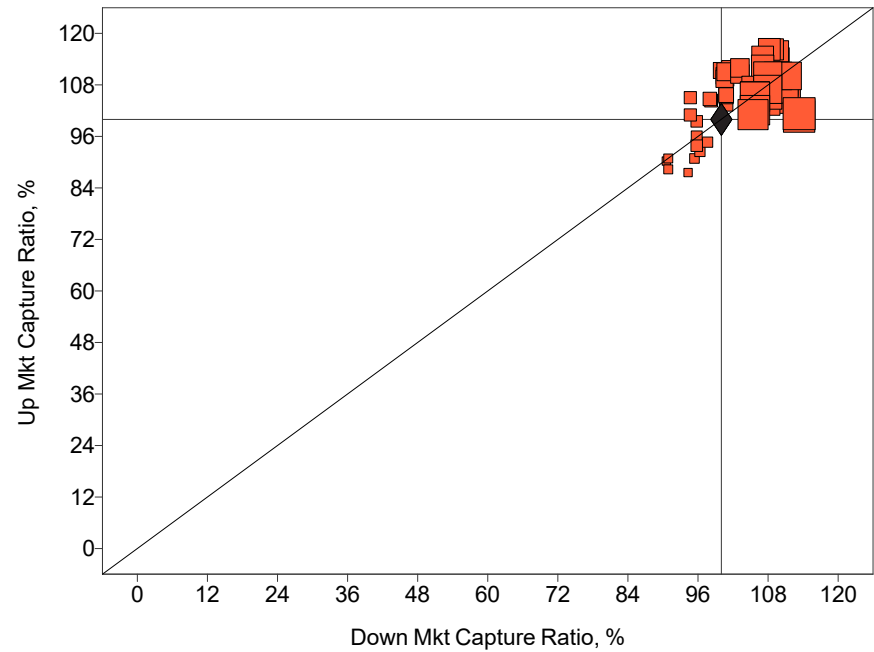
Up/Down Capture

Jan 19 - Dec 23



Rolling Up/Down Capture

36 Month rolling windows, Jan 19 - Dec 23

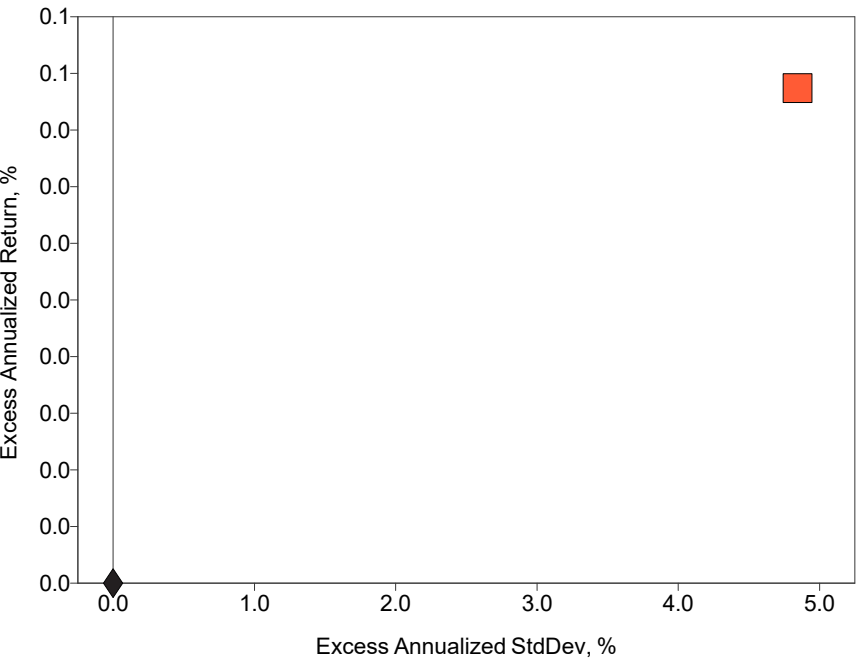


Summary Statistics

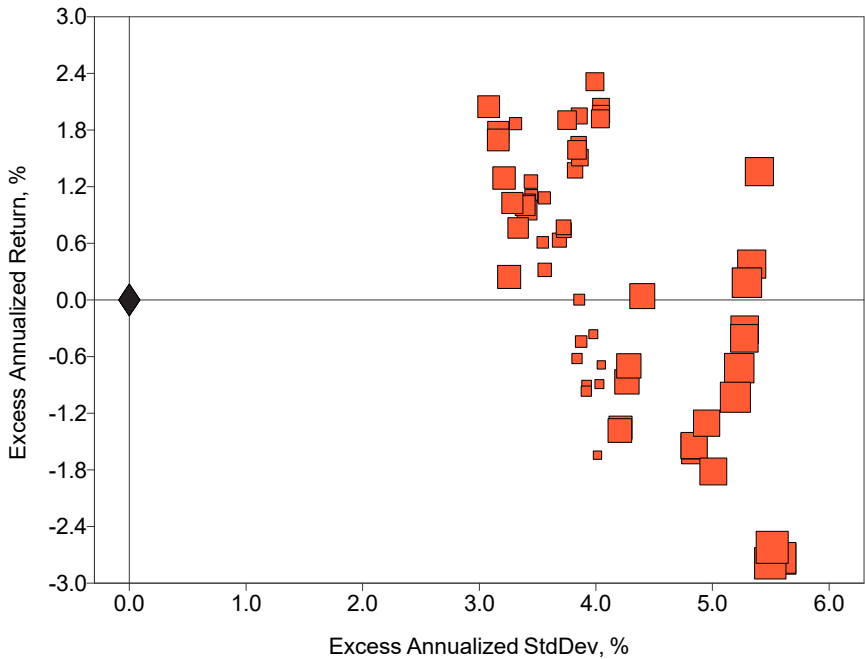
Jan 19 - Dec 23

	Up Months	Down Months	Up Market Avg. Return	Down Market Avg. Return	Up Market Capture, %	Down Market Capture, %	R ²	Up/Down Score
■ American Beacon International Eq R5	34	26	4.63	-4.74	109.04	108.91	95.53	1
◆ MSCI EAFE Large Value ND USD	35	25	4.29	-4.32	100.00	100.00	100.00	

Relative Risk Return Jan 19 - Dec 23



Rolling Relative Risk Return 36 Month rolling windows, Jan 19 - Dec 23

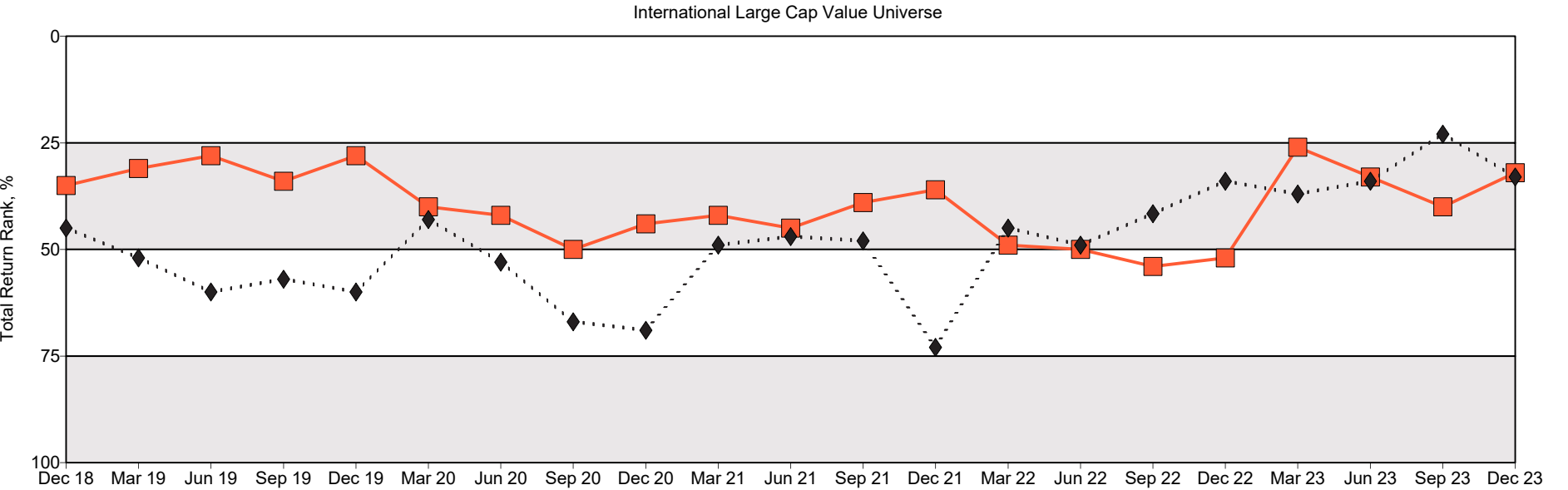


Summary Statistics Jan 19 - Dec 23

	Annualized Excess Return, %	Annualized Excess StdDev, %	Information Ratio	Significance Level, %	R ²	Info Ratio Score
American Beacon International Eq R5	0.05	4.84	0.01	50.90	95.53	1

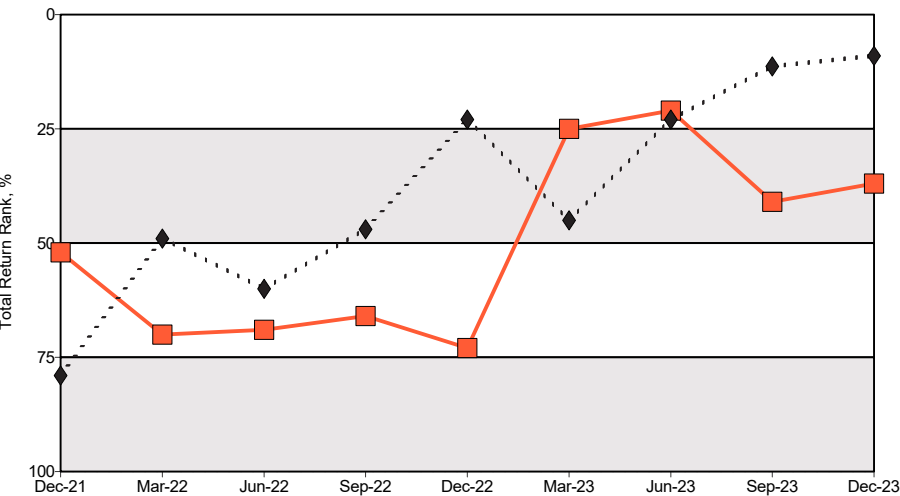
Rolling 5 Year Return Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Return Rank (5Yr Universe Size: 1675)

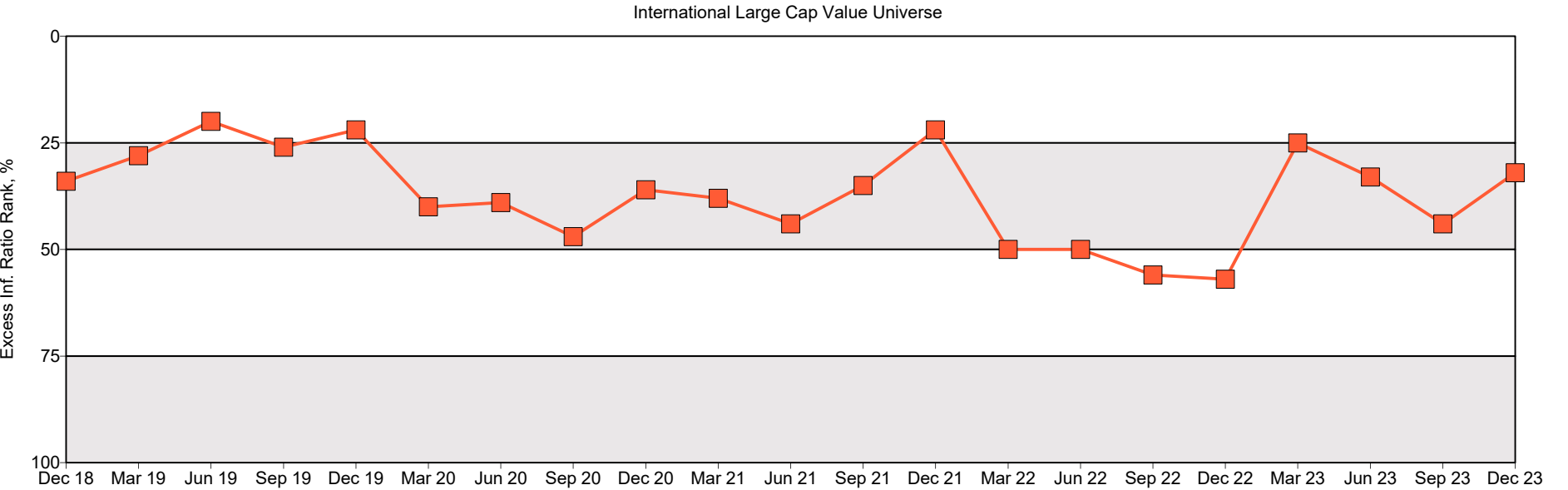
36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	Return Rank Score
American Beacon International Eq R5	52.0	17.0	0
MSCI EAFE Large Value ND USD	NA	NA	NA

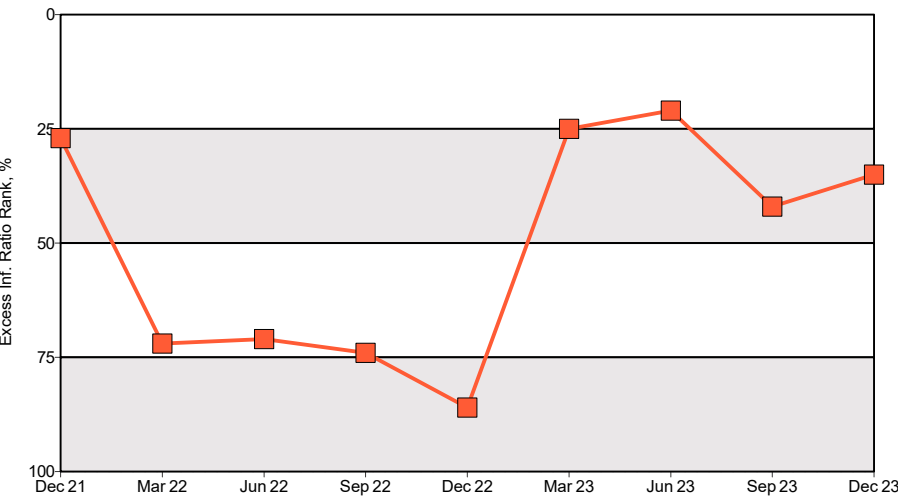
Rolling 5 Year Information Ratio Rank

20 quarter rolling windows, Jan 14 - Dec 23



Median Information Ratio Rank (5Yr Universe Size: 1675)

36 Month rolling windows, Jan 19 - Dec 23



	Median Rank	Volatility of Rank	IR Rank Score
American Beacon International Eq R5	42.0	21.0	1

Investment objectives and strategies vary among fund, and may not be similar for funds included in the same asset class. All definitions are typical category representations. Please note that all investments are subject to market and other risk factors, which could result in loss of principal. Fixed income securities carry interest rate risk. As interest rates rise, bond prices usually fall, and vice versa. The specific share classes or accounts identified above may not be available or chosen by the plan. Share class and account availability is unique to the client's specific circumstances. There may be multiple share classes or accounts available to the client from which to choose. All recommendations are subject to vendor/provider approval before implementation into the plan. The performance data quoted may not reflect the deduction of additional fees, if applicable. If reflected, additional fees would reduce the performance quoted. Performance data is subject to change without prior notice.

Performance of indexes reflects the unmanaged result for the market segment the selected stocks represent. Indexes are unmanaged and not available for direct investment. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index. The information used in the analysis has been taken from sources deemed to be reliable, including, third-party providers such as Markov Processes International, Morningstar, firms who manage the investments, and/or the retirement plan providers who offer the funds. Every reasonable effort has been made to ensure completeness and accuracy; however, the final accuracy of the numbers and information is the responsibility of the investment manager(s) of each fund and/or the retirement plan providers offering these funds. Discrepancies between the figures reported in this analysis, and those reported by the actual investment managers and/or retirement plan providers, may be caused by a variety of factors, including: Inaccurate reporting by the manager/provider; Changes in reporting by the manager/provider from the time this report was prepared to a subsequent retro-active audit and corrected reporting; Differences in fees and share-classes impacting net investment return; and, Scriveners error by your advisor in preparing this report.

The enclosed Investment Due Diligence report, including the Scorecard System, is intended for plan sponsor and/or institutional use only. The materials are not intended for participant use. The purpose of this report is to assist fiduciaries in selecting and monitoring investment options. A fund's score is meant to be used by the plan sponsor and/or fiduciaries as a tool for selecting the most appropriate fund. Fund scores will change as the performance of the funds change and as certain factors measured in the qualitative category change (e.g., manager tenure). Fund scores are not expected to change dramatically from each measured period, however, there is no guarantee this will be the case. Scores will change depending on the changes in the underlying pre-specified Scorecard factors.

Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted. Likewise, a fund's score using the Scorecard System does not guarantee the future performance or style consistency of a fund. This report was prepared with the belief that this information is relevant to the plan sponsor as the plan sponsor makes investment selections. Fund selection is at the discretion of the investment fiduciaries, which are either the plan sponsor or the committee appointed to perform that function. Cash Equivalents (e.g., money market fund) and some specialty funds are not scored by the Scorecard System. The enclosed Investment Due Diligence report and Scorecard is not an offer to sell mutual funds. An offer to sell may be made only after the client has received and read the appropriate prospectus. For the most current month-end performance, please contact your advisor. The Strategy Review notes section is for informational purposes only. The views expressed here are those of your advisor and do not constitute an offer to sell an investment. An offer to sell may be made only after the client has received and read the appropriate prospectus.

Mutual funds are sold by prospectus only. Before investing, investors should carefully consider the investment objectives, risks, charges and expenses of a mutual fund. The fund prospectus provides this and other important information. Please contact your Investment Advisor/Consultant or Vendor/Provider to obtain a prospectus. Please read the prospectus carefully before investing or sending money.

For a copy of the most recent prospectus, please contact your Investment Advisor/Consultant or Vendor/Provider.

Notes

1. All statistics calculated over a five year time period.
2. Style analytics reflect the parameters on a returns-based style map (on a scale of 100 to -100 for each axis.) Fund passes if it plots out in the appropriate section of the style map, representing the fund's stated style.
3. Style drift is measured by the style drift score, which is a statistic measuring the rolling style-based analysis for a fund.
4. Risk is measured as the fund's standard deviation of returns.
5. R-squared measures the percentage of the fund's movement that is explained by the fund's benchmark (market).
6. Up/Down capture statistics measure the percentage of performance the fund/strategy is capturing versus the benchmark (market).
7. Information Ratio is a risk adjusted performance statistic measuring relative return over relative risk.
8. Peer group ranking statistics measure the funds median rank versus the applicable peer group universe.
9. Qualitative Detail: T = Tenure (qualitative score impacted negatively due to low manager tenure); E = Expenses (qualitative score impacted negatively due to higher than average expense ratio); and S = Statistics (qualitative score impacted negatively due to weak/poor strength of statistics).

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T. Rowe Price Spectrum Mod Gr Allc

Category: Moderate Aggressive

TRSGX
12/31/2023

Fund Strategy

The investment seeks the highest total return over time consistent with a primary emphasis on capital growth and a secondary emphasis on income. The fund invests in a diversified portfolio typically consisting of approximately 80% of its net assets in stocks; 16% of its net assets in bonds, money market securities, and cash reserves; and 4% of its net assets in alternative investments. Under normal conditions, its allocation to the broad asset classes will be within the following ranges: stocks (70-90%), bonds, money markets securities, and cash reserves (5-25%), and alternative investments (0-10%).

Fund Information

Strategy Asset (\$ mm): 3,274.00

Share Class Assets (\$ mm): 1,401.00

Manager: Charles M. Shriver

Manager Tenure: 13 Years

Portfolio Statistics

Alpha*: -2.19 P/E: 18.48
Beta*: 0.99 P/B: 2.79
as of date 9/30/2023 SEC Yield (%): -
Turnover: 62.20
as of date 12/31/2023

*Best fit index: Morningstar US Mod Agg Tgt Alloc NR USD
*3-year statistic: Morningstar US Mod Agg Tgt Alloc NR USD

Scorecard

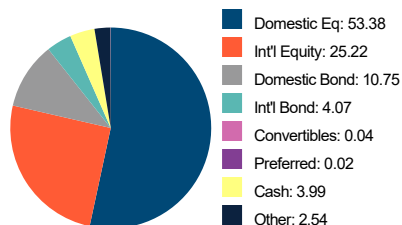
Asset Allocation Strategies	Ticker	Style			Risk / Return			Peer Group		Qual. (2pt max)	Score Components		Score
		Risk Level	Style Diversity	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	SR Ratio Rank		Allocation	Selection	
T. Rowe Price Spectrum Mod Gr Allc	TRSGX	1	1	1	0	0	0	0	0	2	5	6.8	6
		15.23	80.31/19.69	98.71	15.23/9.25	96.20/99.85	-0.55	67.00	67.00	-			MA
										0.79			
Asset Allocation Strategies	Score 12/31/2023	Score 9/30/2023	Score 6/30/2023	Score 3/31/2023	Score 12/31/2022	Score 9/30/2022	Score 6/30/2022	Score 3/31/2022					
T. Rowe Price Spectrum Mod Gr Allc	6	7	8	8	8	8	7	9					
	MA	MA	MA	MA	MA	MA	MA	MA					

The Scorecard Methodology incorporates both quantitative and qualitative factors into evaluating fund managers and their investment strategies (80% of the score is quantitative and 20% is qualitative). The scoring system is built around pass/fail criteria, on a scale of 0-10 (with 10 being the best) and there is a fund history requirement (5 years for active strategies and 3 years for passive strategies). For Active and Asset Allocation Strategies, the Scorecard factors are weighted 30% to style, 30% to risk/return, 20% to peer group rankings and 20% to qualitative factors.

Risk Bucket as of 12/31/2023

Risk Bucket	Risk Range	Risk (X)
Aggressive	16.50X≤18.75	-
Moderate Aggressive	13.75X≤16.50	15.23
Moderate	10.75X≤13.75	-
Moderate Conservative	8.00X≤10.75	-
Conservative	5.00X≤8.00	-

Asset Allocation (%) as of 9/30/2023



% Emerging Mkt: 5.60

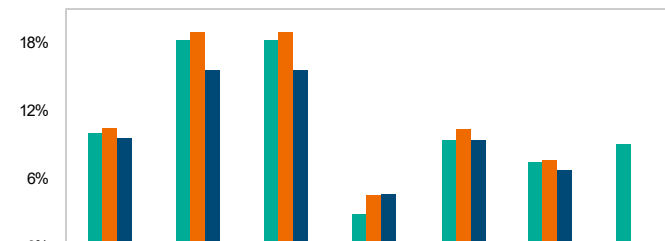
Top 10 Holdings(%) as of 9/30/2023

T. Rowe Price Instl Emerging Mkts Eq / IEMFX	5.57
T. Rowe Price Real Assets I / PRIKX	4.92
Microsoft Corp / MSFT	3.15
T. Rowe Price Multi-Strategy Ttl Ret I / TMSSX	2.50
Apple Inc / AAPL	2.28
T. Rowe Price US Trs Long-Term Idx I / PRUUX	2.15
T. Rowe Price Intl Bd (USD Hdgd) I / TNBMX	2.15
Reserve Invt Fds	2.14
Blackstone Partners Offshore Fund	2.10
Future on E-mini S&P 500	2.03
% in Top 10 Holdings	28.98
# of Holdings	1,559

Additional Information

Prospectus Net Exp. Ratio:	0.79
Prospectus Gross Exp. Ratio:	0.94
Avg Exp Ratio Morningstar (%):	0.68
12b-1 fees (%):	-
Closed - New Inv:	-
Closed - All Inv:	-
Min Investment:	\$2,500
Waiver Amt:	-
Waiver Exp Date:	-
Strategy Inception:	7/29/1994
Share Class Inception:	7/29/1994

Performance Analysis as of 12/31/2023



	QTR	YTD	1 Year	3 Years	5 Years	10 Years	Since Inception
T. Rowe Price Spectrum Mod Gr Allc	9.86%	18.03%	18.03%	2.66%	9.25%	7.31%	8.82%
Style Benchmark	10.23%	18.76%	18.76%	4.40%	10.20%	7.46%	
Peer Group*	9.38%	15.36%	15.36%	4.45%	9.17%	6.58%	
Peer Group Rank*	48	28	28	84	55	27	-
Peer Group Size (funds)*	-	-	318	305	280	221	-

*Morningstar Peer Group: Moderately Aggressive Allocation

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Contact for most recent month end performance.

PIMCO StocksPLUS Small Institutional

Category: Small Cap Blend

PSCSX
12/31/2023

Fund Strategy

The investment seeks total return which exceeds that of the Russell 2000® Index. The fund seeks to exceed the total return of the Russell 2000® Index by investing under normal circumstances in Russell 2000® Index derivatives, backed by a diversified portfolio of Fixed Income Instruments actively managed by PIMCO. "Fixed Income Instruments" include bonds, debt securities and other similar instruments issued by various U.S. and non-U.S. public- or private-sector entities.

Fund Information

Strategy Asset (\$ mm):	1,049.00	Alpha*:	-1.46	P/E:	-
Share Class Assets (\$ mm):	670.00	Beta*:	1.07	P/B:	-
Manager:	Bryan Tsu	as of date 9/30/2023	SEC Yield (%)	5.59	
Manager Tenure:	5 Years	Turnover:	108.00	as of date 12/31/2023	
		*Best fit index: Russell 2000 TR USD			
		*3-year statistic: Russell 2000 TR USD			

Scorecard

Active Strategies	Ticker	Style			Risk / Return			Peer Group		Qual. (2pt max)	Score
		Style	Style Drift	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	Info Ratio Rank		
PIMCO StocksPLUS Small Institutional	PSCSX	1	1	1	0	0	0	0	0	2	5
		-5.36/ -99.84	3.69	99.5 8	26.44/ 9.06	106.46/ 108.57	-0.33	89.00	97.00	- 0.75	SCB

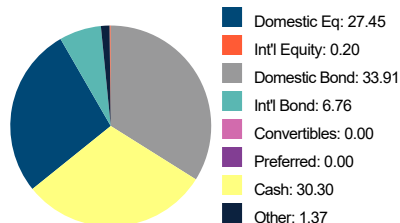
Active Strategies	Score 12/31/2023	Score 9/30/2023	Score 6/30/2023	Score 3/31/2023	Score 12/31/2022	Score 9/30/2022	Score 6/30/2022	Score 3/31/2022
PIMCO StocksPLUS Small Institutional	5	5	5	5	7	7	7	7
	SCB	SCB	SCB	SCB	SCB	SCB	SCB	SCB

The Scorecard Methodology incorporates both quantitative and qualitative factors into evaluating fund managers and their investment strategies (80% of the score is quantitative and 20% is qualitative). The scoring system is built around pass/fail criteria, on a scale of 0-10 (with 10 being the best) and there is a fund history requirement (5 years for active strategies and 3 years for passive strategies). For Active and Asset Allocation Strategies, the Scorecard factors are weighted 30% to style, 30% to risk/return, 20% to peer group rankings and 20% to qualitative factors.

Sector Allocation as of 9/30/2023

Technology:	0.00
Comm:	0.00
Cons Cyclical:	0.00
Cons Defensive:	0.00
Industrials:	0.00
Basic Materials:	0.00
Financial Services:	0.00
Real Estate:	0.00
Healthcare:	0.00
Energy:	0.00
Utilities:	0.00

Asset Allocation (%) as of 9/30/2023



% Emerging Mkt: 0.24

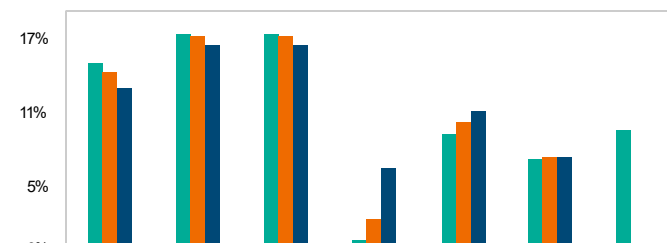
Top 10 Holdings(%) as of 9/30/2023

RU20INTR TRS EQUITY FEDL01+5*BULLET...	34.75
E-mini Russell 2000 Index Future Dec 23 /...	33.58
RU20INTR TRS EQUITY FEDL01+3...	18.18
2 Year Treasury Note Future Dec 23 / ZTZ23	13.28
Federal National Mortgage Association 6.5%	7.85
Federal National Mortgage Association 6%	5.03
Pimco Fds	4.95
RU20INTR TRS EQUITY FEDL01-9 BPS	4.89
Federal National Mortgage Association 5.5%	4.01
RU20INTR TRS EQUITY FEDL01+10 ULO	3.88
% in Top 10 Holdings	130.39
# of Holdings	724

Additional Information

Prospectus Net Exp. Ratio:	0.75
Prospectus Gross Exp. Ratio:	0.75
Avg Exp Ratio Morningstar (%):	1.01
12b-1 fees (%):	-
Closed - New Inv:	-
Closed - All Inv:	-
Min Investment:	\$1,000,000
Waiver Amt:	-
Waiver Exp Date:	-
Strategy Inception:	3/31/2006
Share Class Inception:	3/31/2006

Performance Analysis as of 12/31/2023



	QTR	YTD	1 Year	3 Years	5 Years	10 Years	Since Inception
PIMCO StocksPLUS Small Institutional	14.70%	17.08%	17.08%	0.54%	9.06%	7.05%	9.36%
Russell 2000 Index	14.03%	16.93%	16.93%	2.22%	9.97%	7.16%	
Peer Group*	12.75%	16.18%	16.18%	6.32%	10.86%	7.17%	

Peer Group Rank*	18	46	46	97	84	63	-
Peer Group Size (funds)*	-	-	615	593	557	391	-

*Morningstar Peer Group: Small Blend

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Contact for most recent month end performance.

Calvert Small-Cap I

Category: Small Cap Blend

CSVIX
12/31/2023

Fund Strategy

The investment seeks long-term capital appreciation through investment primarily in small-cap common stocks of U.S. companies. The fund normally invests at least 80% of its net assets, including borrowings for investment purposes, in common stocks of small companies. The manager defines small companies as those whose market capitalization falls within the range of the Russell 2000® Index at the time of investment. The fund may also invest up to 25% of its net assets in foreign securities.

Fund Information

Strategy Asset (\$ mm):	3,017.00	Alpha*:	0.20	P/E:	22.41
Share Class Assets (\$ mm):	2,361.00	Beta*:	0.84	P/B:	2.45
Manager:	Michael D. McLean	as of date 11/30/2023	SEC Yield (%):	-	
Manager Tenure:	7 Years	Turnover:	44.00		
		as of date 12/31/2023			
		*Best fit index: Morningstar US Sml Ext TR USD			
		*3-year statistic: Morningstar US Sml Ext TR USD			

Scorecard

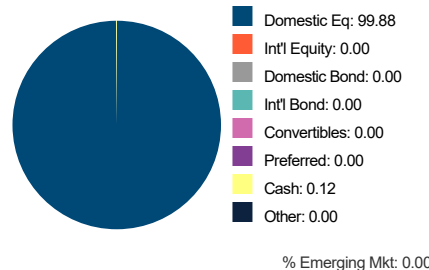
Active Strategies	Ticker	Style			Risk / Return			Peer Group		Qual. (2pt max)	Score
		Style	Style Drift	R²	Risk / Return	Up / Down	Info Ratio	Return Rank	Info Ratio Rank		
Calvert Small-Cap I	CSVIX	0	0	1	1	1	1	0	0	2	6
		-29.50/-31.29	25.48	90.38	20.08/10.35	82.36/80.93	0.05	68.00	63.00	-	SCB
										0.94	
Active Strategies		Score 12/31/2023	Score 9/30/2023	Score 6/30/2023	Score 3/31/2023	Score 12/31/2022	Score 9/30/2022	Score 6/30/2022	Score 3/31/2022		
Calvert Small-Cap I		6	7	8	8	8	8	8	8		
		SCB	SCB	SCB	SCB	SCB	SCB	SCB	SCB		

The Scorecard Methodology incorporates both quantitative and qualitative factors into evaluating fund managers and their investment strategies (80% of the score is quantitative and 20% is qualitative). The scoring system is built around pass/fail criteria, on a scale of 0-10 (with 10 being the best) and there is a fund history requirement (5 years for active strategies and 3 years for passive strategies). For Active and Asset Allocation Strategies, the Scorecard factors are weighted 30% to style, 30% to risk/return, 20% to peer group rankings and 20% to qualitative factors.

Sector Allocation as of 11/30/2023

Comm:	0.00
Energy:	0.00
Basic Materials:	2.12
Utilities:	3.52
Cons Defensive:	4.95
Technology:	9.25
Real Estate:	10.28
Cons Cyclical:	14.60
Healthcare:	16.35
Financial Services:	17.49
Industrials:	21.42

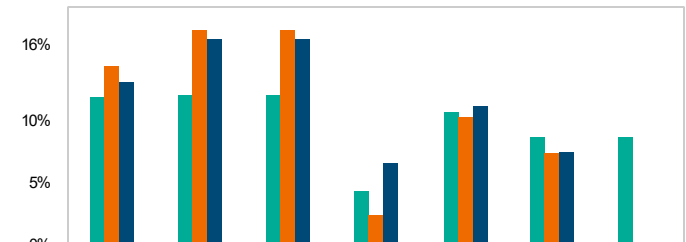
Asset Allocation (%) as of 11/30/2023



Top 10 Holdings(%) as of 11/30/2023

CBIZ Inc / CBZ	3.70	Prospectus Net Exp. Ratio:	0.94
Chemed Corp / CHE	3.29	Prospectus Gross Exp. Ratio:	0.94
Wyndham Hotels & Resorts Inc Ordinary Share...	3.08	Avg Exp Ratio Morningstar (%):	1.01
Core & Main Inc Class A / CNM	2.93		
Essential Properties Realty Trust Inc / EPRT	2.91	12b-1 fees (%):	-
Woodward Inc / WWD	2.75	Closed - New Inv:	-
AptarGroup Inc / ATR	2.64	Closed - All Inv:	-
Dorman Products Inc / DORM	2.61	Min Investment:	\$1,000,000
White Mountains Insurance Group Ltd / WTM	2.45	Waiver Amt:	0.01
EastGroup Properties Inc / EGP	2.31	Waiver Exp Date:	1/31/2022
% in Top 10 Holdings	28.69	Strategy Inception:	10/1/2004
# of Holdings	74	Share Class Inception:	4/29/2005

Performance Analysis as of 12/31/2023



	QTR	YTD	1 Year	3 Years	5 Years	10 Years	Since Inception
Calvert Small-Cap I	11.55%	11.73%	11.73%	4.07%	10.35%	8.41%	8.37%
Russell 2000 Index	14.03%	16.93%	16.93%	2.22%	9.97%	7.16%	
Peer Group*	12.75%	16.18%	16.18%	6.32%	10.86%	7.17%	
Peer Group Rank*	74	87	87	76	66	17	-
Peer Group Size (funds)*	-	-	615	593	557	391	-

*Morningstar Peer Group: Small Blend

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Contact for most recent month end performance.

Fidelity Small Cap Index

Category: Small Cap Blend

FSSNX
12/31/2023

Fund Strategy

The investment seeks to provide investment results that correspond to the total return of stocks of small-capitalization United States companies. The fund invests normally at least 80% of its assets in securities included in the Russell 2000® Index. It lends securities to earn income.

Fund Information

Strategy Asset (\$ mm):	25,415.00	Alpha*:	0.09	P/E:	11.46
Share Class Assets (\$ mm):	25,415.00	Beta*:	1.00	P/B:	1.61
Manager:	Louis Bottari	as of date 10/31/2023	SEC Yield (%):	-	
Manager Tenure:	12 Years	Turnover:	9.00		
		as of date 12/31/2023			
		*Best fit index: Russell 2000 TR USD			
		*3-year statistic: Russell 2000 TR USD			

Scorecard

Passive Strategies	Ticker	Style				Peer Group				Qual. (2pt max)	Score
		Style	Style Drift	R ²	Tracking Error	TE Rank	Expense Rank	Return Rank	SR Ratio Rank		
Fidelity Small Cap Index	FSSNX	1	1	1	1	1	1	1	1	2	10
		-1.48/-99.23	0.50	100.00	0.10	34.00	5.00	46.00	46.00	-0.03	SCB-P

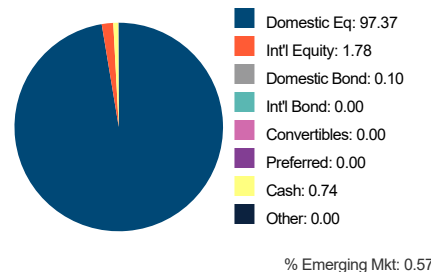
Passive Strategies	Score 12/31/2023	Score 9/30/2023	Score 6/30/2023	Score 3/31/2023	Score 12/31/2022	Score 9/30/2022	Score 6/30/2022	Score 3/31/2022
Fidelity Small Cap Index	10	10	10	10	10	10	10	10
	SCB-P	SCB-P	SCB-P	SCB-P	SCB-P	SCB-P	SCB-P	SCB-P

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Sector Allocation as of 10/31/2023

Comm:	2.17
Utilities:	2.97
Cons Defensive:	4.43
Basic Materials:	4.73
Real Estate:	7.31
Energy:	8.44
Cons Cyclical:	10.14
Healthcare:	14.36
Financial Services:	14.50
Technology:	15.47
Industrials:	15.47

Asset Allocation (%) as of 10/31/2023



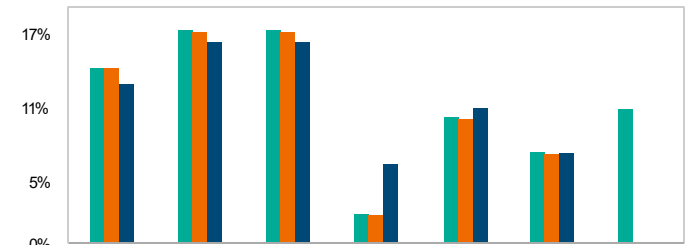
Top 10 Holdings(%) as of 10/31/2023

Fidelity® Cash Central Fund	0.71
E-mini Russell 2000 Index Future Dec 23 /...	0.59
Super Micro Computer Inc / SMCI	0.53
Matador Resources Co / MTDR	0.33
Chord Energy Corp Ordinary Shares - New /...	0.33
Light & Wonder Inc Ordinary Shares / LNW	0.32
Murphy Oil Corp / MUR	0.32
Weatherford International PLC Ordinary Shares -...	0.32
Comfort Systems USA Inc / FIX	0.31
Selective Insurance Group Inc / SIGI	0.30
% in Top 10 Holdings	4.05
# of Holdings	1,992

Additional Information

Prospectus Net Exp. Ratio:	0.03
Prospectus Gross Exp. Ratio:	0.03
Avg Exp Ratio Morningstar (%):	1.01
12b-1 fees (%):	-
Closed - New Inv:	-
Closed - All Inv:	-
Min Investment:	\$0
Waiver Amt:	0.10
Waiver Exp Date:	6/30/2017
Strategy Inception:	9/8/2011
Share Class Inception:	9/8/2011

Performance Analysis as of 12/31/2023



	QTR	YTD	1 Year	3 Years	5 Years	10 Years	Since Inception
Fidelity Small Cap Index	14.05%	17.12%	17.12%	2.32%	10.07%	7.32%	10.73%
Russell 2000 Index	14.03%	16.93%	16.93%	2.22%	9.97%	7.16%	
Peer Group*	12.75%	16.18%	16.18%	6.32%	10.86%	7.17%	
Peer Group Rank*	29	46	46	87	71	54	-
Peer Group Size (funds)*	-	-	615	593	557	391	-

*Morningstar Peer Group: Small Blend

The performance analysis displayed is reflective of past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate over time. Current performance may differ from the performance displayed. Investing includes risk, including potential loss of principal. Carefully consider any and all investment objectives, risk factors and charges and expenses before investing. Contact your financial advisor or consultant for funds current performance and a copy of the most recent prospectus.

Contact for most recent month end performance.

American Beacon International Eq R5

Category: International Large Cap Value

AAIEX
12/31/2023

Fund Strategy

The investment seeks long-term capital appreciation. The fund normally invests at least 80% of its net assets (plus the amount of any borrowings for investment purposes) in common stocks and securities convertible into common stocks (collectively, "stocks") of issuers based in at least three different countries located outside the United States. It primarily invests in countries comprising the MSCI® EAFE Index. The MSCI EAFE Index is designed to represent the performance of large- and mid-capitalization securities across 21 developed markets countries, including countries in Europe, Australasia and the Far East, and excluding the U.S. and Canada.

Fund Information

Strategy Asset (\$ mm): 920.00

Share Class Assets (\$ mm): 394.00

Manager: Kirk L. Brown

Manager Tenure: 30 Years

Portfolio Statistics

Alpha*: 0.29 P/E: 13.06
Beta*: 1.12 P/B: 1.65
as of date 10/31/2023 SEC Yield (%): -
Turnover: 46.00
as of date 12/31/2023

*Best fit index: MSCI ACWI Ex USA Value NR USD
*3-year statistic: MSCI ACWI Ex USA Value NR USD

Scorecard

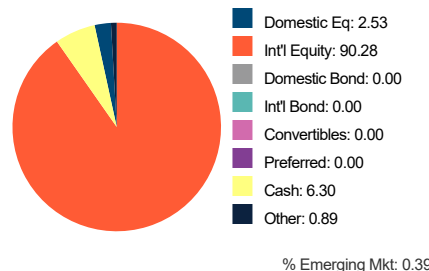
Active Strategies	Ticker	Style			Risk / Return			Peer Group		Qual. (2pt max)	Score
		Style	Style Drift	R ²	Risk / Return	Up / Down	Info Ratio	Return Rank	Info Ratio Rank		Q4 2023
American Beacon International Eq R5	AAIEX	1	1	1	1	1	1	0	1	2	9
		-65.56/ 89.51	19.36	95.5 3	21.53/ 7.64	109.04/ 108.91	0.01	52.00	42.00	- 0.72	ILCV
Active Strategies	Score	Score	Score	Score	Score	Score	Score	Score	Score	Score	Score
American Beacon International Eq R5	12/31/2023	9/30/2023	6/30/2023	3/31/2023	12/31/2022	9/30/2022	6/30/2022	3/31/2022	12/31/2021	9/30/2021	6/30/2021
	9	6	9	9	6	6	8	7	7	7	7
	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV	ILCV

The Scorecard Methodology incorporates both quantitative and qualitative factors into evaluating fund managers and their investment strategies (80% of the score is quantitative and 20% is qualitative). The scoring system is built around pass/fail criteria, on a scale of 0-10 (with 10 being the best) and there is a fund history requirement (5 years for active strategies and 3 years for passive strategies). For Active and Asset Allocation Strategies, the Scorecard factors are weighted 30% to style, 30% to risk/return, 20% to peer group rankings and 20% to qualitative factors.

Country Exposure(%) as of 10/31/2023

US: 2.73
Canada: 3.03
Latin America: 0.00
United Kingdom: 26.70
EuroZone: 42.45
Europe ex-EuroZone: 7.45
Europe Emerging: 0.00
Africa: 0.00
Middle East: 0.00
Japan: 12.07
Australasia: 0.00
Asia Developed: 5.19
Asia Emerging: 0.39

Asset Allocation (%) as of 10/31/2023



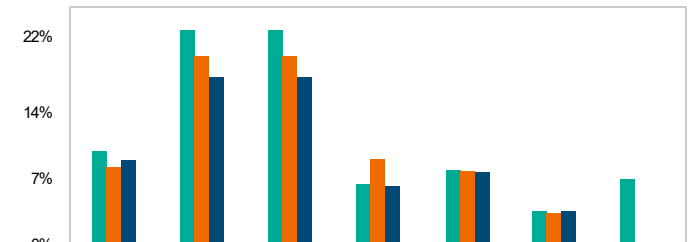
Top 10 Holdings(%) as of 10/31/2023

Msci Eafe Dec23 Ifus 20231215 6.43
American Beacon US Govt MMkt Select / AAOXX 5.83
RELX PLC / REL 2.59
BP PLC / BP 2.49
Roche Holding AG / ROG 2.48
Rolls-Royce Holdings PLC / RR 2.35
Samsung Electronics Co Ltd / 005930 1.87
SAP SE / SAP 1.86
UniCredit SpA / UCG 1.73
Air Liquide SA / AI 1.64
% in Top 10 Holdings 29.25
of Holdings 126

Additional Information

Prospectus Net Exp. Ratio: 0.72
Prospectus Gross Exp. Ratio: 0.72
Avg Exp Ratio Morningstar (%): 0.98
12b-1 fees (%): -
Closed - New Inv: -
Closed - All Inv: -
Min Investment: \$250,000
Waiver Amt: -
Waiver Exp Date: -
Strategy Inception: 8/7/1991
Share Class Inception: 8/7/1991

Performance Analysis as of 12/31/2023



	QTR	YTD	1 Year	3 Years	5 Years	10 Years	Since Inception
American Beacon International Eq R5	9.61%	22.46%	22.46%	6.17%	7.64%	3.29%	6.75%
MSCI EAFE Large Value ND USD	8.02%	19.67%	19.67%	8.80%	7.58%	3.08%	
Peer Group*	8.68%	17.51%	17.51%	6.01%	7.44%	3.36%	
Peer Group Rank*	28	9	9	47	43	56	-
Peer Group Size (funds)*	-	-	380	341	320	204	-

*Morningstar Peer Group: Foreign Large Value

The performance analysis displayed is reflective of past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate over time. Current performance may differ from the performance displayed. Investing includes risk, including potential loss of principal. Carefully consider any and all investment objectives, risk factors and charges and expenses before investing. Contact your financial advisor or consultant for funds current performance and a copy of the most recent prospectus.

Contact for most recent month end performance.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Sanctuary and Support Services
Consent Agenda Item #: 8XIII	Director: Misty Gattie-Blanco
Subject: Project HOPE Bridge Housing Update	Officer: Jack Lazzarini

Background

The information presented is intended to keep the Board apprised of the eight (8) rooms for Project HOPE Bridge Housing located at N Street, funded by the City of Fresno and Fresno City College.

2023 Month	No. of Households* Entered Project	No. of Individuals Entered Project			No. of Households* Exited Project	No. of Individuals Exited Project
		Ages 18 – 24	Over Age 25	Under Age 18		
January	6	4	2	4	3	3
February	9	4	5	2	6	10
March	4	3	1	2	3	3
April	3	0	3	2	4	8
May	5	3	2	2	8	10
June	4	0	5	4	2	2
July	2	1	1	0	2	2
August	6	2	4	0	5	10
September	3	1	2	0	4	6
October	7	2	6	2	8	11
November	3	1	2	0	3	3
December	2	2	0	0	2	2

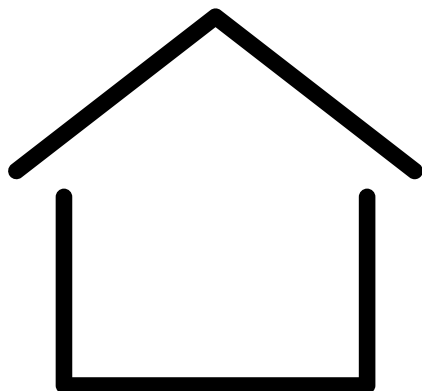
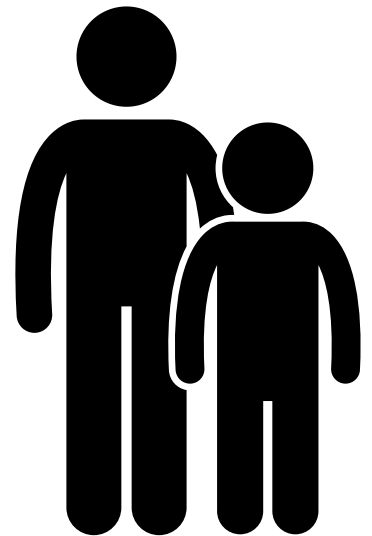
**Households can include a single individual adult; more than one adult; and/or adults with children.*

Project HOPE Bridge Housing 2023 Year End Review



*74 individuals served, consisting of
54 households*

*23 adults (18-24 years old)
33 adults (over 24 years old)
18 children (under 18 years old)*



*70 individuals exited to a
safe and stable destination*



Fresno EOC
**Sanctuary
Homeless
Services**



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Women, Infants & Children
Consent Agenda Item: 8XIV	Director: Annette Thornton
Subject: Program Monitoring Review	Officer: Jack Lazzarini

Background

The information presented is intended to keep the Board apprised of the Program Monitoring Review (PMR) results and corrective action plan.

The California Department of Public Health (CDPH), Women, Infants and Children (WIC) Division completed a biennial PMR on August 24, 2023. Reviews are typically done in person by State WIC staff. However, USDA allowed the review to be completed using a virtual process. This is the second time the PMR was conducted virtually.

PMR includes evaluation of health and nutrition services; breastfeeding and customer services; civil rights; staff training and support; referrals, health linkages, integration, and outreach; program integrity practices; WIC Card security; participant certification; program administration; and the Farmers' Market Nutrition Program (FMNP). Numerous documents were sent electronically. A total of 40 participant electronic files were randomly selected by State WIC staff for review.

The Letter of Findings with PMR results was received on October 25, 2023. The following two areas requiring corrective action:

1. Several employees have not completed the mandatory annual trainings within the required timeframe of 30 days after returning from absence.
2. One participant record who was issued FMNP benefits in 2022, showed Nutrition Education contact was made, but no topic of FMNP education was documented as required.

Conclusion

A Corrective Action Plan (CAP) must identify actions and time frames necessary to resolve the Areas for Required Action, including quality improvement efforts planned for monitoring staff and procedures to ensure finding are resolved. The CAP was submitted on December 14, 2023 (see attachment) and was approved by CDPH/WIC on January 4, 2024.



1920 Mariposa St., Suite 330
Fresno, CA 93721

December 14, 2023

To Paula Etcheberry:

The following Corrective Action Plan (CAP) is being submitted in response to the October 25, 2023, Letter of Findings (LOF) from our August 24, 2023, Program Monitoring Review (PMR). The CAP includes Area of Required Action (ARA), Corrective Action, Timeline and Monitoring (including frequency and expected outcome).

ARA	Corrective Action	Timeline	Monitoring	
			Methodology	Expected Outcome
1. A review of the Staff Profile found that several employees had not completed the mandatory annual training within the required timeframe due to absence. Any staff member who misses a scheduled annual training must make up the training as soon as possible, and any staff on leave must complete the training shortly upon returning to work. Upon their return, this training was not completed until >30 days after return. For completion of make-up training,	1a. Review list of mandatory trainings and due dates at the beginning of the year. Not completing mandatory trainings as required is subject to disciplinary action. Staff to sign acknowledgement.	1a. Planned to be completed at December 13, 2023, all staff in-service.	1a. Acknowledgement forms will be kept with other State WIC forms requiring staff signature.	100% compliance
	1b. For staff who miss mandatory training days, an Outlook invite will be sent to staff and their supervisor by the Staff Training manager. The invite will instruct to complete within 30 days of the	1b. Implement after December 13, 2023, all staff in-service.	1b. Review and update State WIC Staff Profile excel spreadsheet after each staff training session. Staff Training manager will give an updated training	100% compliance

per WIC Program Policy Manual (WPPM) 1000-30: <i>Make-up training within 30 days for those who miss scheduled date, or within 30 days of returning to work after a leave of any duration.</i>	missed training or within 30 days upon returning to work.		report to Director on monthly basis.	
2. Review of a sample of participant records who were issued Farmers' Market Nutrition Program (FMNP) benefits found one record in which neither Fruit and Vegetable education nor the use of FMNP Checks education was documented in WIC WISE. These education contacts and documentation of completions are requirements of FMNP as outlined in the WPPM 800-20 and WPPM	<p>2a. Nutrition Education documentation title in WIC WISE updated to read: <i>FMNP Nutrition/ Check Use Education</i></p> <p>2b. FMNP protocol, including proper issuance and documentation will be reviewed with all staff. Staff assigned to work onsite at farmers markets will review the protocol prior to issuing benefits.</p>	<p>2a. Ongoing since May 2023</p> <p>2b. Plan to be done at May 2024 in-service.</p> <p>Refresher review to be done during FMNP season May – July 2024.</p>	<p>2a. Verify FMNP documentation title in WIC WISE prior to FMNP season.</p> <p>2b. FMNP Coordinator will review files for proper documentation the next business day after FMNP benefits are issued.</p>	<p>100% compliance</p> <p>100% compliance</p>

800-30. These requirements are also reviewed during the annual mandatory FMNP Local Agency Season Start Up Webinar. In the one record there were dates indicating a Nutrition Education (NE) contact as NE Documentation, but no topic or topics identified. The topic(s) could not be determined. No other indication of NE for the two FMNP required topics.	Before FMNP coupons are issued, staff will provide FMNP Nutrition/Check Use education and document <i>FMNP Nutrition/Check Use Education</i> in WIC WISE per protocol.			
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Training logs, training acknowledgement forms, FMNP protocol, and FMNP logs will be available for review at our next PMR. Thank you.

Sincerely,

Annette Thornton

Annette Thornton, RD
WIC Program Director



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Program Planning & Development
Consent Agenda Item: 8XV	Director: Ana Medina
Subject: Grant Tracker	Officer: Jack Lazzarini

Background

The information presented in the Grant Tracker is intended to keep the Board apprised of program grant activity for Fresno EOC.

Fresno County Economic Opportunities Commission
Grant Tracker 2024
Monday, February 5, 2024

2024 AWARDED								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	Amount Awarded

2024 NOT AWARDED								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	

PENDING GRANTS								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	
Grants In Progress								
1/31/2024	LCC - Local Conservation Corps (LCC)	Congress Appropriations of Community Project Grant	Congressman Jim Costa, CA-21st District	\$500,000	This will fund vehicle and heavy equipment for in-the-field student learning.	1/22/2024	TBA	
2/27/2024	Training and Employment - Valley Apprenticeship Connections (VAC)	Career Skills Training	Department of Energy	\$1,081,250	Funding for job training to gain industry-recognized certifications in energy efficiency sector.	1/22/2024	5/20/2024	
2/1/2024	Foster Grandparent Program	FY2024 AmeriCorps Senior Companion Program (SCP) Replacement and Expansion Opportunity	AmeriCorps	\$360,000	Funding will expand capacity to service low-income program participants in rural areas of Fresno County.	TBD	TBD	
2/14/2024	Health Services	2024 Public Awareness and Community Outreach Campaign Services	The Office of Community Partnerships and Strategic Communications (OCPSC), housed within the Office of	\$600,000	To effectively reach and engage Californians, especially those experiencing the greatest health and social inequities.	TBD	TBD	
Grants Submitted								
1/16/2024	Health Services - AFLP	2024-25 Title X Family Planning Services	Essential Access Health	\$464,531	Title X funding is awarded to subrecipients across the nation to provide low-income women and men below 250% of poverty with quality sexual and reproductive health care services.	1/22/2024	2/5/2024	
1/22/2024	Sanctuary and Support Services - Homeless Services	Homeless, Housing, Assistance, and Prevention (HHAP)	County of Fresno Department of Social Services	\$4,368,334	Funding will support Bridge & Rapid Rehousing services.	1/22/2024	TBA	
9/28/2023	Sanctuary and Support Services - Homeless Services	FY23 Continuum of Care Competition and Renewal or Replacement of Youth Homeless Demonstration Program Grants	US Department of Housing and Urban Development	\$2,350,438	To quickly re-house homeless individuals, families, persons fleeing domestic violence, and youth while minimizing the trauma and dislocation caused by homelessness;and to promote access to and effective utilization of mainstream programs by those experiencing homelessness.	N/A	1/30/2024	
10/6/2023	Health Services	Early Childhood Wraparound Services	CA Dept of Health Care Services	\$1,500,000	Funding for childhood wraparound services, could include home visitation or prenatal care.	8/28/2023	1/31/2024	
9/15/2023	Training and Employment - Summer Youth Internship Program	US Bank Letter of Interest	US Bank	\$75,000	Funding salaries for interns.	N/A	TBA	

Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	Amount Awarded
8/16/2023	Foster Grandparent Program	Advancing Equity in Aging	Next 50 Initiative	\$97,050	Funding will provide support to organizations who serve historically marginalized older adults.	8/28/2023	TBA	
8/7/2023	Food Services - Food Distributions	Sierra Grant Program	Bank of the Sierra	\$5,000	Funding food distributions for 2023.	7/24/2023	10/7/2023	
8/8/2023	Food Services - Food Distributions	Costco Charitable Giving Grant	Costco Wholesale	\$7,500	Funding food distributions for 2023.	7/24/2023	9/18/2023	
6/27/2023	Health Services - Community Health Center	Community-Based Approaches to Reducing Sexually Transmitted Diseases	CDC	\$325,000	STI Testing on Community College Campuses, and free transportation to clinic if treatment is needed	5/22/2023	8/31/2023	
11/1/2023	Sanctuary and Support Services - CVAHT	Slave 2 Nothing Grant	Slave 2 Nothing Foundation	\$45,000	Funding will support low-barrier emergency housing for victims of human trafficking.	N/A	5/3/2024	
11/15/2023	Health Services	Fresno HOPE	Fresno HOPE Pathways Community Hub	\$325,000	Funding will support care coordination agencies employing community health workers, utilizing the Pathways Community HUB Institute™ Model.	11/27/2023	11/24/2023	
9/8/2023	LCC - Local Conservation Corps (LCC)	CCC Non-Residential Grant	California Conservation Corps	\$24,000	Funding will support training and job-readiness for corps members.	N/A	TBA	
6/13/2023	Training & Employment	One Fresno Youth Jobs Corps Program Worksites	City of Fresno	\$300,000	Provision of work experience for Fresno youth.	6/26/2023	10/13/2023	

2023 Grant Summary

TOTAL 2023		
Metric	Number	%
Grants Submitted	52	100.0%
Grants Approved	16	30.8%
Grants Pending Decision	12	23.1%
Grants Denied	25	48.1%
Funds Requested	\$36,203,745	100.0%
Funds Approved	\$8,260,098	22.8%
Funds Pending Decision	\$5,053,988	14.0%
Funds Denied	\$22,520,769	62.2%
Average Request	\$ 706,686.58	
Request Range	\$2000-\$9,827,841	

Jan-23			Feb-23			Mar-23		
Metric	Number	%	Metric	Number	%	Metric	Number	%
Grants Submitted	0	-	Grants Submitted	9	100%	Grants Submitted	5	100%
Grants Approved	0	-	Grants Approved	2	22%	Grants Approved	1	20%
Grants Denied	0	-	Grants Denied	7	78%	Grants Denied	4	80%
Funds Requested	\$0	-	Funds Requested	\$16,121,481	100%	Funds Requested	\$2,673,348	100%
Funds Approved	\$0	-	Funds Approved	\$2,391,800	15%	Funds Approved	\$25,000	1%
Funds Denied	\$0	-	Funds Denied	\$13,729,681	85.2%	Funds Denied	\$2,648,348	99%
Average Request	-		Average Request	\$1,827,685		Average Request	\$645,558	
Request Range	-		Request Range	\$130,000 - \$9,827,841		Request Range	\$25,000 - \$2,258,348	

Apr-23			May-23			Jun-23		
Metric	Number	%	Metric	Number	%	Metric	Number	%
Grants Submitted	3	100%	Grants Submitted	4	100%	Grants Submitted	9	100%
Grants Approved	2	67%	Grants Approved	3	75%	Grants Approved	2	22%
Grants Denied	1	33%	Grants Denied	1	25%	Grants Denied	5	56%
Funds Requested	\$3,260,000	100%	Funds Requested	\$3,491,700	100%	Funds Requested	\$3,032,030	100%
Funds Approved	\$1,894,525	58%	Funds Approved	\$2,275,305	65%	Funds Approved	\$643,230	21%
Funds Denied	\$1,000,000	31%	Funds Denied	\$1,212,980	35%	Funds Denied	\$1,763,800	58%
Average Request	\$1,086,667		Average Request	\$938,340		Average Request	\$336,892	
Request Range	\$250,000 - \$2,010,000		Request Range	\$20,000 - \$2,000,000		Request Range	\$25,000-\$515,800	

Jul-23			Aug-23			Sep-23		
Metric	Number	%	Metric	Number	%	Metric	Number	%
Grants Submitted	2	100%	Grants Submitted	7	100%	Grants Submitted	5	100%
Grants Approved	0	0%	Grants Approved	3	43%	Grants Approved	1	20%
Grants Denied	2	100%	Grants Denied	1	14%	Grants Denied	1	20%
Funds Requested	\$1,150,960	100%	Funds Requested	\$1,160,522	100%	Funds Requested	\$3,351,438	100%
Funds Approved	\$0	0%	Funds Approved	\$950,972	82%	Funds Approved	\$2,000	0%
Funds Denied	\$1,150,960	100%	Funds Denied	\$100,000	9%	Funds Denied	\$900,000	27%
Average Request	\$977,327		Average Request	\$165,789		Average Request	\$250,250	
Request Range	\$300,000-\$2,258,348		Request Range	\$5,000-\$786,543		Request Range	\$2,000	

Oct-23			Nov-23			Dec-23		
Metric	Number	%	Metric	Number	%	Metric	Number	%
Grants Submitted	3	100%	Grants Submitted	5	100%	Grants Submitted	0	-
Grants Approved	2		Grants Approved	0	0%	Grants Approved	0	-
Grants Denied	0		Grants Denied	3	60%	Grants Denied	0	-
Funds Requested	\$1,577,266	100%	Funds Requested	\$385,000	100%	Funds Requested	\$0	-
Funds Approved	\$77,266		Funds Approved	\$0	0%	Funds Approved	\$0	-
Funds Denied	\$0		Funds Denied	\$15,000	4%	Funds Denied	\$0	-
Average Request	\$85,000		Average Request	\$5,000		Average Request	-	
Request Range	\$20,000-\$1,500,000		Request Range	\$5,000-\$325,000		Request Range	-	



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: N/A
Consent Agenda Item: 8XVII	Director: N/A
Subject: Executive Committee Charter	Officer: Emilia Reyes

Recommended Action

Executive Committee recommends review and approval for full Board consideration of the Executive Committee Charter.

Background

The Committee's Charter is attached for reference in a redline version for review and discussion.

The changes proposed are in alignment with our current Agency's Bylaws.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board, this item will be revised to align with the agency's Bylaws. If not approved, the Executive Committee Charter will not be in alignment with the agency's Bylaws.

FRESNO ECONOMIC OPPORTUNITIES COMMISSION

EXECUTIVE COMMITTEE CHARTER

MODIFIED ~~JULY~~ FEBRUARY 20~~24~~12

FRESNO EOC EXECUTIVE COMMITTEE CHARTER

PURPOSE

~~The Executive Committee shall act on interim matters which cannot wait until the next Commission meeting.~~ This committee shall have all the powers and authority of the Board of Commissioners, as allowed by law in the intervals between meetings of the board, and is subject to the direction and control of the full board. The Executive Committee shall make a report of its actions and proceedings to the board at the next meeting of the board held after such actions or proceedings.

RESPONSIBILITIES AND DUTIES

A. Administrative Matters.

~~The Executive Committee shall act on interim matters that cannot wait until the next Board meeting. The Executive Committee shall also review the next full Board agenda.~~

B. Finance Matters.

~~The Executive Committee shall: (1) advise the Chief Executive Officer in the preparation and administration of the operating budget; (2) oversee the administration, collection, and disbursement of the financial resources of the Corporation; (3) advise the Board with respect to significant financial decisions, including the integrity of the financial statements of the Corporation; (4) establish outcome statements for meeting the agency's infrastructure needs, and periodically monitor performances towards meeting these statements; (5) review, discuss and make recommendations to the Board of Commissioners relative to the agency's plans for real estate acquisitions/development, property maintenance, and technology advancements, and procurement activities; (6) meet the community and agency staff's infrastructure needs; (7) provide employment opportunities for clients, students, and corps members by creating relationships among the agency's education and employment training programs; (8) promote procurement opportunities to small proprietors, women, and minority operated businesses and those certified as a Disadvantaged Business Enterprise (DBE) as it pertains to facilities management/maintenance, IT network, telecommunications, and real estate activities.~~

C. Program, Planning & Evaluation.

~~The Executive Committee shall: (1) oversee implementation of the Agency's community needs assessment and strategic planning processes approved by the Board and conduct periodic reviews to determine to what degree the Corporation is addressing the needs and goals identified through these processes; (2) discuss, review and recommend grant applications; (3) track the progress of the Agency's programs in meeting identified goals and objectives; (4) oversee the Agency's processes for outcome reporting for its programs; (5) review monitoring reports, evaluations, and other feedback on the Agency's programs provided by funding sources and other interested parties; (6) work with the Agency's staff and full Board to ensure that monitoring findings are addressed in a timely way; and (7) oversee the regular evaluation of the Agency's programs by the Agency's Board and staff.~~

D. Human Resources.

~~The Executive Committee shall (1) periodically review the Agency's personnel policies and procedures and implementation thereof, and report findings and recommendations for policy and~~

procedures changes to the full Board; (2) periodically review the Agency's compensation schedule and implementation thereof, recommend any changes to the Board; (3) review and make recommendations to the Board regarding the Agency's employee benefits package; (4) receive information from the Agency's staff and attorneys on legal proceedings involving its employees and make recommendations and reports to the Board on those matters; (5) on a quarterly basis, review and approve quarterly financial reports and investment performance reports of the retirement plans; receive an update of the current investment market; and answer any questions of the employees and Board members on the plan; and (6) provide employees with a diversified slate of investment options and make changes to the funds offered as needed.

~~A.—Exercising some or all powers of the board between regularly scheduled meetings.~~

~~B.—Chief Executive Officer evaluation and compensation.~~

MEMBERSHIP

The Executive Committee shall be composed of the nine (9) elected Board members, consisting of the Chair, Vice Chair, Treasurer, and two (2) Public Sector Commissioners, two (2) Target Area Commissioners, and two (2) Community Sector Commissioners. The Executive Committee shall be composed of the four (4) elected officers as well as the chairs of the Audit, Bylaws, Program and Planning, Human Resources and Pension Committee.

MEETINGS

The Executive Committee shall meet as necessary as determined by the Chair. An Executive ~~C~~committee meeting may be called by the Chair or upon the written request of two (2) committee members within 48 hours' notice. Meetings are open to all commissioners and staff. Only those members appointed to the committee are allowed to vote. The committee may invite members of management or others to attend to provide pertinent information, as necessary.

~~A quorum for any meeting shall be 50 percent of the committee. Participation in a meeting through the use of conference telephone or electronic video screen communication pursuant to Section 7 of the Corporation's Bylaws constitutes presence in person at that meeting.~~

QUORUM

A quorum shall be established at the beginning of all meetings. A quorum for any meeting of the Committee shall consist of 50 percent of that Committee. Participation in a meeting through the use of conference telephone or electronic video screen communication pursuant to Article VIII of the Corporation's Bylaws constitutes presence at that meeting. Should a meeting not meet quorum requirements or lose the quorum at some point during the meeting, the meeting may proceed with informational items however no action, other than adjournment, may be taken.

AGENDA AND MINUTES

The Chair will approve the agenda for the committee's meetings and any member may suggest items for consideration. Written materials will be provided to the committee as far in advance of the meeting as possible.

The committee shall keep a record of its actions and proceedings, and when required by the board, shall make a report of those actions and proceedings to the board.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Food Services
Consent Agenda Item #: 8XVIII	Director: Jon Escobar
Subject: Facility Strategic Plan - Ad hoc Committee	Officer: Jack Lazzarini

Recommended Action

Executive Committee recommends approval for full Board consideration to form an Ad hoc Committee that will participate in Real Estate readiness training offered by Community Vision.

Background

The committee will consist of staff and/or board members, the purpose of the one-day training is to build the organization's real estate knowledge and understanding of the real estate process.


In October 2021, following approval from the Board, Food Services entered into a contract with Community Vision to conduct a Facility Strategic Plan/Feasibility Study aimed at assessing the viability of building a USDA Inspection Kitchen. As part of their scope of work, Community Vision will perform the following.

1. Build the Organization's Real Estate Knowledge.
2. Gather and Distill Organization Priorities.
3. Define Constraints and Core Needs.
4. Organizational Financial Review.
5. Project Scenario Analysis (pro forma); and
6. Summary Report with Recommendations.

In the training Community Vision will deliver a presentation and engage with staff and/or board members on the real estate aspect of building a USDA Inspection Kitchen. This phase is intended to lay the groundwork and foster a shared understanding of the organization's potential real estate endeavors. Additionally, it will encompass an exploration of financing alternatives and a thorough examination of crucial factors to consider before embarking on such a project.

Food Services has promptly furnished all the requisite financial documentation and has been holding bi-weekly meetings with Community Vision to address current challenges the program faces due to its limited capacity for growth.

Community Vision has set a timeline to have the Facility Strategic Plan/Feasibility Study completed by early April of 2024. Community Vision is eager to collaborate with staff and/or board members in



providing real estate training and continuing the feasibility study to determine the viability of building a USDA Inspection Kitchen.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board, an Adhoc committee will be formed. If not approved, an Adhoc committee will not be formed.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Foster Grandparents Program
Consent Agenda Item #: 8XIX	Coordinator: Leah Struck
Subject: 2024 AmeriCorps Seniors Foster Grandparent Program Replacement and Expansion Opportunity Grant	Officer: Jack Lazzarini

Recommended Action

Executive Committee recommends ratification for full Board consideration of the 2024 AmeriCorps Seniors Foster Grandparent Program (FGP) Replacement and Expansion Opportunity grant application in the amount of \$396,000 per year for a 3-year project period.

Background

The Foster Grandparents Program (FGP) submitted a request for \$396,000 on February 1, 2024, to AmeriCorps. This project will support 35-40 new volunteers and their placement in rural and urban educational sites. FGP partners senior volunteers with schools, Head Starts and afterschool programs in low-income neighborhoods in Fresno and Madera County. Current volunteer stations include Madera County Superintendent of Schools Early Childhood Learning Center, Big Sandy Rancheria Head Start in Eastern Fresno County foothills, Pine Ridge Elementary, Fowler Early Childhood Education Center, and Kerman Unified. This funding opportunity will also support the development of Memorandums of Understanding (MOU's) for new sites, including outreach efforts to Native, Hmong, and Southeast Asian communities.

The application was submitted on February 1, 2024, for a three-year project period, beginning on July 1, 2024.

Fiscal Impact

This funding will support personnel costs, mileage, volunteer stipends, and outreach and marketing to increase volunteer sites for youth mentorship. There is a 10% match required for approximately \$44,000, and the below in-kind and projects that will generate cash will meet the requirement.

In-Kind: Head Start meals provided to volunteers during the service day, school lunch meals made available for the volunteers during the service day and Boys & Girls Clubs snacks provided during volunteer service day/s.

In-Kind: Meeting rooms for in-service meetings.

Cash: Recycling fundraising project for cash.

FOSTER GRANDPARENTS - CNCS BUDGET			
12 MONTHS			
JULY 1, 2024 - JUNE 30, 2025			
		CNCS	GRANTEE
PERSONNEL	FTE	AMOUNT	
PROGRAM MANAGER	0.20	15,334	
PROGRAM COORDINATOR	1.00	48,263	
VOLUNTEER SPECIALIST	1.00	42,903	
FRINGE BENEFITS		33,948	
TOTAL PERSONNEL		140,448	
OPERATIONS			
STAFF TRAVEL		2,412	
SUPPLIES		1,624	
VOLUNTEER COSTS			
VOLUNTEER SUPPORT COSTS		12,507	7,700
OTHER VOLUNTEER COSTS		39,566	36,280
VOLUNTEER STIPENDS		183,744	
ADMIN (DIRECT COSTS \$156,990 X10%)		15,699	
TOTAL BUDGET		396,000	43,980

CSBG Organizational Standard

Organization has demonstrated partnerships across the community, for specifically identified purposes; utilizes information gathered from key sectors of community in assessing needs and resources; and documents number of volunteers and hours mobilized in support of activities per Category 2, Standard 2.1, 2.2 and 2.4.

Conclusion

If ratified by the Board, this item will support the expansion of volunteer station sites and place 35-40 older adult volunteers in high-need urban and rural educational sites in Fresno and Madera County. If not approved, FGP will not accept funding if grant is awarded and will not be able to expand or provide additional services to youth.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Health Services
Consent Agenda Item #: 8XX	Director: Jane Thomas
Subject: 2024 Public Awareness and Community Outreach Campaign Services Grant	Officer: Jack Lazzarini

Recommended Action

Executive Committee recommends ratification for full Board consideration of the 2024 Public Awareness and Community Outreach Campaign Services grant application to the Office of Community Partnerships and Strategic Communications (OCPSC) in the amount of \$600,000 over a two-year project period.

Background

The Office of Community Partnerships and Strategic Communications (OCPSC), housed within The Governor's Office of Planning and Research (OPR) coordinates statewide outreach efforts with trusted community partners to directly engage Californians – particularly those experiencing the greatest health and social inequities – and provides them with culturally competent and accessible information and resources. Health Services proposed project and OCPSC goals align to support historically underserved and underrepresented vulnerable community members through strategic community engagement, outreach, and education.

As a trusted community partner, Health Services will effectively reach and engage Fresno County residents, especially those experiencing the greatest health and social inequities on topics related to Covid-19, excessive heat, water conservation, and those with an Individual Tax Identification Number (ITIN).

The application was submitted on February 14, 2024, in the amount of \$600,000 over a two-year project period from July 1, 2024 to June 30, 2026.

Fiscal Impact

This funding will support personnel, operational and indirect costs over a two-year funding cycle beginning July 1, 2024. No match required.

	Year 1	Year 2
Personnel	\$241,256	\$241,350
Operating Expenses	\$31,471	\$31,377
Indirect	\$27,273	\$27,273
Total	\$300,000	\$300,000

Conclusion

If ratified by the Board, this item will allow Health Services to continue providing the delivery of important health updates and information as defined by OCPSC to underserved vulnerable communities. If not ratified, Health Services will not accept funding from (OCPSC) if awarded and the program will not be able to provide information and resources related to COVID-19, excessive heat, and water conservation.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Training and Employment
Consent Agenda Item #: 8XXI	Director: Patrick Turner
Subject: California Economic Resiliency Fund (CERF) Subaward Agreement	Officer: Jack Lazzarini

Recommended Action

Executive Committee recommends ratification for full Board consideration of the California Economic Resiliency Fund (CERF) Subaward Agreement from the United Way of Fresno and Madera Counties (UWPMC) and the Economic Development Corporation of Fresno County in the amount of \$150,000 for an 18-month project period.

Background

Training and Employment (T&E) submitted a description of services and budget in February 2023 to provide Job Development and Education Re-Engagement for program participants of the Good Jobs Challenge. T&E's Employment Opportunities focus is one of the six Strategic Goals of the agency. Currently, similar services are being provided to the Fresno Regional Workforce Development Board. In addition, T&E recently completed a contract with Project Hope for similar services, the contract ended last year in June.

The 18-month project period will run from March 1, 2024 to August 31, 2025.

Fiscal Impact

This funding will support one full-time staff member and a portion of a management staff member over the 18-month project period. These positions were previously supported by CSBG funding. No match is required.

EDD CERF BUDGET 18 MONTHS MARCH 1, 2024 - AUGUST 31, 2025		
PERSONNEL	FTE	AMOUNT
QUALITY ASSURANCE MANAGER	8.00%	9,355
BUSINESS ACCOUNT SPECIALIST	100.00%	73,101
FRINGE BENEFITS		45,670
TOTAL PERSONNEL	108.00%	128,127
OPERATIONS		
FACILITY COSTS (\$360/PER MONTH X 18 MONTHS)		6,480
SUPPLIES (\$97.59/PER MONTH x 18 MONTHS)		1,757
ADMIN (DIRECT COST \$136,364 x 10%)	10%	13,636
TOTAL BUDGET		150,000



CSBG Organizational Standard

Organization has demonstrated partnerships across the community, for specifically identified purposes per Category 2, Standard 2.1.

Conclusion

If ratified by the Board, funds will be used to pay for a full-time equivalent position whose current contract ended on February 29, 2024. If not ratified, this award will be sent back to the State and the full-time position will have to be eliminated.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: N/A
Consent Agenda Item #: 8XXII	Director: Andy Arredondo
Subject: Community Needs Assessment	Officer: Michelle L. Tutunjian

Recommended Action

The information presented below is intended to keep the Board apprised on the 2024 Community Needs Assessment.

Background

As a Community Action Agency, the agency is mandated to conduct a Community Needs Assessment (CNA) for Community Services Block Grant (CSBG) Organizational Standards - Category Three, Standard 3.1 and Head Start Program Performance Standard (HSPPS) § 1302.11, (2), (b). The assessment is essential for aligning the agency's mission with community needs, and maintaining compliance and accountability with funding requirements. The timeline below provides an overview of the agency's efforts to complete a comprehensive needs assessment.

- Pre-Launch (January-February):
Identify consultant and organize a community assessment advisory/planning committee
Provide formalized training (staff advisory committee and governing board)
Create data collection plan (quantitative and qualitative data)
Develop communication plan
- Launch (March 5 – April 5):
Community Needs Assessment survey open to the community
Conduct 56 focus groups and four community forums
Canvass neighborhoods and conduct street outreach
Conduct interviews with stakeholders
Utilize website and social media to communicate survey
- Finalize Report (April 6 – May 20):
Community responses organized and provided to consultant
Finalize collection of poverty data and organize key findings
Consultant to prepare CNA report
Present CNA report to Executive Committee for board approval

Fiscal Impact

The estimated cost to complete the Community Needs Assessment (CNA) is projected to be \$107,000 which includes the following: consultant (\$65,000), honorarium for the public to participate in the community forums and focus groups (\$25 per person with est. 1,500 people in attendance, totaling \$37,500), printing marketing materials (est. \$1,000), refreshments for the community forums (est. \$3,000) and childcare (\$25 per hour at the Community Forums, totaling est. \$500) at the community forums. In addition, 30 staff are participating as in-kind administrative expense for the advisory/planning committee and support for forums and focus groups.

Without the CNA, there is a potential loss of the funding for Head Start 0 - 5 program and CSBG.

Conclusion

Staff will follow the timeline above to complete the CNA. Upon the formal governing board accepting the completed community assessment, the agency will submit the report to the California Department of Community Services & Development prior to September 30, 2024, and provide to the Office of Head Start upon request.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Program Planning & Development
Consent Agenda Item #: 8XXIII	Director: Ana Medina
Subject: Grant Tracker	Officer: Michelle Tutunjian

Recommended Action

The information presented in the Grant Tracker is intended to keep the Board apprised of program grant activity.

Background

The below information are updates from the last grant tracker presented on February 5, 2024.

Not Awarded					
Program	Name	Funder	Amount Awarded	Summary	Not Awarded Reason
Health Services – Community Health Center	Community-Based Approaches to Reducing Sexually Transmitted Diseases	CDC	\$325,000	STI Testing on Community College campuses, and free transportation to clinic if treatment is needed	TBA

Fresno County Economic Opportunities Commission
Grant Tracker
Monday, March 4, 2024

2024 AWARDED								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	Amount Awarded
6/13/2023	Training & Employment	One Fresno Youth Jobs Corps Program Worksites	City of Fresno	\$300,000	Provision of work experience for Fresno youth for a 6-month period.	N/A	TBA	\$200,000
9/28/2023	Sanctuary and Support Services - Homeless Services	FY23 Continuum of Care Competition and Renewal or Replacement of Youth Homeless Demonstration Program Grants	US Department of Housing and Urban Development	\$2,350,438	To quickly re-house homeless individuals, families, persons fleeing domestic violence, and youth while minimizing the trauma and dislocation caused by homelessness; to promote access to and effective utilization of mainstream programs by homeless; and to optimize self-sufficiency among those experiencing homelessness.	N/A	1/29/2024	\$2,019,622

2024 NOT AWARDED								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	
6/27/2023	Health Services - Community Health Center	Community-Based Approaches to Reducing Sexually Transmitted Diseases	CDC	\$325,000	STI Testing on Community College Campuses, and free transportation to clinic if treatment is needed.	N/A	1/17/2024	

2024 PENDING GRANTS								
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice	
Grants In Progress								
2/27/2024	Training and Employment - Valley Apprenticeship Connections (VAC)	Career Skills Training	Department of Energy	\$1,081,250	Funding for job training to gain industry-recognized certifications in energy efficiency sector.	1/22/2024	5/20/2024	
3/1/2024	Sanctuary and Support Services - LGBTQ+ Resource Center	2024 wayOUT Grant	wayOUT	\$75,000	Funding will support general operating costs for the LGBTQ+ Resource Center, including case management, drop-in services, and mental health workshops.	N/A	4/1/2024	
3/1/2024	Food Services - Food Distributions	Open Call Grant Application Clif Family Foundation	Clif Family Foundation	\$50,000	Funding for operational support with areas of focus: Strengthen our food system, Enhance equitable community health outcomes, Safeguard our environment and natural resources	N/A	TBA	
3/27/2024	Food Services - Food Distributions	2023-24 Listos California Target Grant (LG) Program RFP	Governor's Office of Emergency Services	\$400,000	The purpose of the Listos California Target Grant (LG) Program is to support organizations throughout California that serve smaller communities with equity priority factors located in areas at moderate to high risk of disaster.	4/8/2024	7/1/2024	
3/4/2024	Food Services - Food Distributions	Kaiser Permanente Food & Nutrition Security Grant	Kaiser Permanente	\$25,000	Funding will expand capacity in rural communities to new partners and schools in Riverdale and Five Points providing 3,600 low-income families with nutritious, healthy, and fresh food commodities.	N/A	TBA	
3/11/2024	Foster Grandparent Program, Health Services - School-Based Sealant Program	FY2024 AmeriCorps Seniors Q4 Foster Grandparent Program Continuation or Renewal	AmeriCorps	\$495,000	Funding will support the continuation of Foster Grandparents. Older adults 55+ and over volunteer to mentor and tutor for low-income students in Fresno County.	2/7/2024	6/1/2024	
Grants Submitted								
2/9/2024	Sanctuary and Support Services - LGBTQ+ Resource Center	American Rescue Plan Act for Community Based Organizations	City of Fresno	\$100,000	Funding will support general operating costs for the LGBTQ+ Resource Center.	N/A	TBA	

2024 PENDING GRANTS							
Due Date	Program	Name	Funder	Amount Requested	Summary	Board Report Date	Date of Notice
2/14/2024	Health Services	2024 Public Awareness and Community Outreach Campaign Services	The Office of Community Partnerships and Strategic Communications (OCPSC), housed within the Office of Planning and Research (OPR)	\$600,000	To effectively reach and engage Californians, especially those experiencing the greatest health and social inequities.	N/A	TBA
2/1/2024	Foster Grandparent Program	FY2024 AmeriCorps Seniors Senior Companion Program (SCP) Replacement and Expansion Opportunity	AmeriCorps	\$360,000	Funding will expand capacity to service low-income program participants in rural areas of Fresno County.	2/7/2024	4/1/2024
1/31/2024	LCC - Local Conservation Corps (LCC)	FY2023 Community Project Funding/Congressionally Directed Spending	Congress Appropriations	\$500,000	This will fund vehicle and heavy equipment for in-the-field student learning.	1/22/2024	TBA
1/29/2024	Sanctuary and Support Services - CVAHT	Human Trafficking Victim Assistance	Cal OES	\$899,999	This grant will fund trauma-informed, supportive services for victims of human trafficking, including shelter, case management, and emergency assistance.	1/22/2024	TBA
1/16/2024	Health Services - AFLP	2024-25 Title X Family Planning Services	Essential Access Health	\$464,531	Title X funding is awarded to subrecipients across the nation to provide low-income women and men below 250% of poverty with quality sexual and reproductive health care services.	1/22/2024	TBA
1/9/2024	Sanctuary and Support Services - Homeless Services	Homeless, Housing, Assistance, and Prevention (HHAP)	County of Fresno Department of Social Services	\$4,368,334	Funding will support Bridge & Rapid Rehousing services.	1/22/2024	TBA
10/6/2023	Health Services	Early Childhood Wraparound Services	CA Dept of Health Care Services	\$1,500,000	Funding for childhood wraparound services, could include home visitation or prenatal care.	N/A	TBA
9/15/2023	Training and Employment - Summer Youth Internship Program	US Bank Letter of Interest	US Bank	\$75,000	Funding salaries for interns.	N/A	TBA
8/7/2023	Food Services - Food Distributions	Sierra Grant Program	Bank of the Sierra	\$5,000	Funding food distributions for 2023.	N/A	TBA
8/8/2023	Food Services - Food Distributions	Costco Charitable Giving Grant	Costco Wholesale	\$7,500	Funding food distributions for 2023.	N/A	TBA
11/1/2023	Sanctuary and Support Services - CVAHT	Slave 2 Nothing Grant	Slave 2 Nothing Foundation	\$45,000	Funding will support low-barrier emergency housing for victims of human trafficking.	N/A	TBA
11/15/2023	Health Services	Fresno HOPE	Fresno HOPE Pathways Community Hub	\$325,000	Funding will support care coordination agencies employing community health workers, utilizing the Pathways Community HUB Institute™ Model.	N/A	TBA
9/8/2023	LCC - Local Conservation Corps (LCC)	CCC Non-Residential Grant	California Conservation Corps	\$24,000	Funding will support training and job-readiness for corps members.	N/A	TBA



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Head Start 0 to 5
Consent Agenda Item #: 8XXIV	Director: Rose M. Pineda
Subject: PUR Reports – December 2023 and January 2024	Chief Executive Officer: Emilia Reyes

Recommended Action

The County-Wide Policy Council recommends acceptance of the Head Start 0 to 5 Program Update Report (PUR) for the month of December 2023 and January 2024.

Background

As per mandate, Head Start agencies provide monthly updates to the Board and Policy council, written as required by the Head Start Act of December 12, 2007, Section 642 Powers and Functions of Head Start Agencies (d) Program Governance Administration, (2) Conduct of Responsibilities, (A) through (I).

Below is a reference to the requirement.

(2) Conduct of Responsibilities – Each Head Start agency shall ensure the sharing of accurate and regular information for use by the governing body and policy council, about program planning, policies, and Head Start agency operations. . .

The report includes all areas mandated by the Head Start Act, not reported elsewhere: (B) monthly program activity summaries; (C) program enrollment reports; (D) monthly reports of meals and snacks provided through the U.S. Department of Agriculture; (H) communication and guidance from the Secretary of Health and Human Services.

The excluded information reported separately includes: (A) monthly financial reports including credit cards, (E) financial audit report, (F) annual Self-Assessment (G) community-wide strategic planning (Community Assessment) and the (I) Annual Program Information Report (PIR).

The December 2023 and January 2024 Program Update Report are attached for review.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the full Board, the December 2023 and January 2024 PUR will be retained for record keeping to verify the County-Wide Policy Council and the Fresno EOC Board of Commissioners had timely and accurate information to ensure programmatic and fiduciary accountability of Fresno EOC Head Start 0 to 5. If not accepted, Head Start Director will review and make recommended changes.



**BOARD OF COMMISSIONERS
PROGRAM UPDATE REPORT**

REPORT MONTH: DECEMBER 2023

I. Head Start 0 to 5

Program Information Summary:

1. December 6-7, 2023: Onsite visit from Region 9 Specialist and Training & Technical Assistance Personnel
2. December 15, 2023: Individual Service Area In- Service.
3. December 18, 2023 - January 1, 2024: Winter Break for Head Start CB, HB, and CSPP Part Day.
4. December 25, 2023 - January 1, 2024: Head Start Offices were closed for Winter Break.
5. December 31, 2023 - a Locally Designed Option application was submitted to OHS via Head Start Enterprise System requesting to increase the number of 3-year old's in 20 classes to assist with our FEI (Funded Enrollment Initiative).

II. Communication and Guidance from the United States Health and Human Services (HHS) Secretary:

The Office of Head Start's (OHS) proposed regulation, [Supporting the Head Start Workforce and Consistent Quality Programming](#), was published in the Federal Register in late November and is open for public comment through January 19, 2024.

OHS is proposing significant changes to the Head Start Program Performance Standards (HSPPS) to increase compensation for many Head Start staff, integrate mental health services into Head Start programming more broadly, and otherwise enhance services to help Head Start programs effectively and equitably meet the evolving needs of the communities they serve. The HSPPS describe how programs are to design and deliver consistent, high-quality programming across a variety of Head Start services.

The proposed changes are designed to ensure fair compensation is a key component of high-quality early care and education. If enacted, these proposed changes would stabilize the Head Start workforce and improve the quality of the comprehensive services that Head Start families count on.

This notice of proposed rulemaking (NPRM) is open for public comment in the Federal Register until January 19, 2024.

III. Early Head Start

Program Information Summary:

1. Early Head Start continues to recruit children and staff to the program.
2. December 13, 2023 - Fire Marshall visited Franklin Head Start to clear the two EHS classes, however, he found some repairs needed to be made. He will return to inspect once the repairs have been made.
3. Bids for Amor Center EHS - our contractor Beam and Company is working on submitting the blue prints to the city of Mendota. Once we get the City approval for the project we will start the remodeling project.
4. As of December 14, 2023, our enrollment was at 78% (372 children).

Early Head Start Enrollment/ADA Reports/Wait List:

Monthly Enrollment: 368; Monthly ADA: Center Base: 77.89%, Home Base: N/A
Wait List Total: 133

Our Early Head Start funded enrollment is 478. For the month of December 2023, we had an actual enrollment of 368. There was a total of 16 drops in the month of November. This gives us an overall enrollment of 394 (368+26). There are 75 children on the waitlist. Staff continue to recruit more children for Eric White and other EHS sites by collaborating with local agencies that provide services to pregnant teens, mothers, and/or prenatal care services. Staff continue to visit WIC offices, clinics, and schools to promote our EHS services. This month we received 32 online referrals for Early Head Start. Our efforts to recruit and hire more staff continues for EHS as we continue to recruit and hire staff for EHS Center Base sites and one staff for EHS Home Base. Analysis of all areas below the recommended 85% ADA, if any, has been done.

Early Head Start Meals/Snacks:

Total Children: Breakfasts: 340 Lunches: 371 Snacks: 322

IV. Head Start

Program Information Summary:

1. Head Start continues to recruit children and staff to the program.
2. As of December 14, 2023, our enrollment was at 72% (1513 children)

Head Start Enrollment/ADA Reports/Wait List:

Monthly Enrollment: 1,510; Monthly ADA: Center Base 78.74%; Home Base: N/A
Wait List Total: 324



Fresno EOC
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BOARD OF COMMISSIONERS PROGRAM UPDATE REPORT

Our Head Start funded enrollment is 2112. For the month of December 2023, we had an actual enrollment of 1510 and a total of 29 drops. As a result, we had an enrollment of 1539 (1510+29). We have 198 children on our waitlist, and 164 of the children are three-year-olds. As we continue to recruit children for the program, we have noticed that the majority of children are three years old. As a result, in order to meet full enrollment an LDO was submitted for approval on December 13, 2023. Recruitment efforts consist of: canvassing, participating in community events, and facilitating presentations in the community. We received 19 online referrals. The ERSEA Team continues to work with the Communications Department to update marketing materials and determine what is the most effective way to continue advertising the program. We also continue to recruit and hire staff. We have the following vacancies: ERSEA Liaison – 1, EHS ERSEA Assistant- 1, Family/Community Services Specialists – 2, Family Support Assistants – 11, Home Base Educators -3, Teachers-3, Teacher Assistants-37. Analysis of all areas below the recommended 85% ADA, if any, has been done.

Head Start Meals/Snacks:

Total Children: Breakfasts: 8,355 Lunches: 10,100 Snacks: 7,912

Submitted by:

Rosa M. Pineda
Head Start Director

Nidia Davis
Program Support Director

(DECEMBER 2023 BOARD PUR REPORT) ND 03/04/24 ~ CWPC (2023-2024 (PUR (BOARD))) ~



BOARD OF COMMISSIONERS PROGRAM UPDATE REPORT

REPORT MONTH: JANUARY 2024

I. Head Start 0 to 5

Program Information Summary:

1. January 1, 2024 - New Year's Holiday was observed. All Head Start 0 to 5 offices and sites were closed in observance.
2. January 10, 2024 - ERSEA Committee met to review policies and procedures.
3. January 13, 2024 - Head Start Director participated in the Executive Leadership Planning Retreat held at Tenaya Lodge in Yosemite.
4. January 15, 2024 - Martin Luther King Jr. Holiday was observed. All Head start 0 to 5 offices and sites were closed in observance.
5. January 21, 2024 - January 25 ,2024 - Head Start Director and staff attended the Winter Leadership Institute in Crystal City, Virginia.
6. January 17, 2024 - MSAT Meeting took place in the West Conference Room at Executive Plaza.
7. January 23, 2024 - Health Services Advisory Committee met.
8. January 24, 2024 - DEC Meeting took place at Franklin Head Start auditorium.
9. January 24, 2024 - Make-Up Program Governance Training took place for Representatives who were not able to attend the first training.
10. January 31, 2024 - Family/Community Services Manager and staff attended the Community Needs Assessment Training with CalCAPA at UC Merced Satellite Site in Fresno, CA.

II. Communication and Guidance from the United States Health and Human Services (HHS) Secretary:

ACF-PI-OHS-24-01 was released on January 9, 2024. This Program Instruction (PI) notifies recipients of the submission requirements for Federal Financial Report Standard Form (SF)-425 for expenditures to the U.S. Department of Health and Human Services (HHS) Payment Management System (PMS) and SF-428 for tangible personal property. HHS has adopted 2 CFR §200.344 for the closeout of federal awards. As such, the liquidation period for closeout is now no later than 120 calendar days after the end of the period of performance (i.e., project period). This only applies to the closeout of the project, not budget periods within the project. The frequency of report submission is updated with details identified below.

This PI supersedes ACF-PI-HS-17-04.

III. Early Head Start

Program Information Summary:

1. Early Head Start continues to recruit children and families to the program.
2. January 29, 2024- We received official notification of the award letter for Fiscal Year 2024-2025 General Child Care and Development Program Expansion Funds for Early Head Start.

Early Head Start Enrollment/ADA Reports/Wait List:

Monthly Enrollment: 401; Monthly ADA: Center Base: 76.40%, Home Base: N/A

Wait List Total: 151

Our Early Head Start funded enrollment is 478. For the month of January 2024, we had an actual enrollment of 368. There was a total of 34 drops and this gives us an overall enrollment of 402(368+34). There are 95 children on the waitlist of which 58 are income eligible. Staff continue to recruit children for EHS center base and home base by collaborating with local agencies that provide services to pregnant teens, mothers, and/or prenatal care services. In addition, staff continue to visit WIC offices, clinics, and schools to promote our EHS services. Early Head Start attended 5 Community events for the month of January and received 89 online referrals for Early Head Start. Our recruitment efforts to hire additional staff for EHS Center Base and Home Base continues. Analysis of all areas below the recommended 85% ADA, if any, has been done.

Early Head Start Meals/Snacks:

Total Children: Breakfasts: 520 Lunches: 570 Snacks: 515

IV. Head Start

Program Information Summary:

1. Head Start continues to recruit children and families to the program.
2. January 27, 2024- Family/Community Services Staff participated in the "Black Voiced in Literacy" event.



Fresno EOC
Head Start
0 to 5

Early Care
&
Education

BOARD OF COMMISSIONERS PROGRAM UPDATE REPORT

3. January 19, 2024, Education Services Manager interviews were held and an applicant was selected to be offered the position.
4. Children were asked to draw self-portraits which were put together as a book taken to Representative Jim Costa by team who attended the NHSA Winter Leadership Conference; the staff loved the book and were very grateful for the gift.
5. Home Base Staff have registered for Home Visiting Series Honoring Home in Home -based Programs scheduled for 2/14/2024.

Head Start Enrollment/ADA Reports/Wait List:

Monthly Enrollment: 1,571; Monthly ADA: Center Base 82.15%; Home Base: N/A

Wait List Total: 376

Our Head Start funded enrollment is 2112. For the month of January 2024, we had an actual enrollment of 1,545 and a total of 30 drops. As a result, we had an enrollment of 1575(1545+30). We have 263 children on our waitlist, and 246 of the children are three-year-olds of which 111 are income eligible. Our data shows that the majority of children are three years old. As a result, we submitted a Locally Designed Program Option to Office of Head Start on February 4, 2024 to enroll additional three-year old children in selected classrooms. In addition, we continue to recruit children and families and our recruitment efforts consist of canvassing, participating in community events, and facilitating presentations in the community. In January, we received 59 online referrals and participated in 3 community events. The ERSEA Team continues to work with the Communications Department to update marketing materials and determine what is the most effective way to continue advertising the program (bus wraparounds and advertisement inside the City buses, radio announcements, and television commercials). Lastly, we continue to face staffing challenges as we have following vacancies: 1-ERSEA Liaison, 4- Family/Community Services Specialists, 10-Family Support Assistants and 4-Home Base Educators, 2- Family Development Specialist, 2-Teachers, 41- Teacher Assistants. Analysis of all areas below the recommended 85% ADA, if any, has been done.

Head Start Meals/Snacks:

Total Children: Breakfasts: 14,526 Lunches: 17,796 Snacks: 13,953

Submitted by:

Rosa M. Pineda
Head Start Director

Nidia Davis
Program Support Director

(JANUARY 2024 BOARD PUR REPORT) bw 03/04/24 ~ CWPC (2023-2024 (PUR (BOARD)) ~



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Head Start 0 to 5
Consent Agenda Item #: 8XXV	Director: Rosa M. Pineda
Subject: Head Start 0 to 5 Monthly Update	Officer: Emilia Reyes

Background

In compliance of the Head Start Performance Standards Sec. 642 (42 U.S.C.9837) Powers and Functions of Head Start Agencies – Program Governance, staff is providing a monthly update to the Board of Commissioners of the oversight of quality services for Head Start children and families to make decision related to program design and implementation.

The following information presented below is intended to keep the Board apprised on Head Start 0 to 5's leadership efforts in improving ongoing communication with the Commissions, focusing primarily on employee morale, compensation, and enrollment.

Head Start Adhoc Group

In November of 2023 the Fresno EOC Board Chair created the Head Start (HS) Adhoc group to enhance the program and identify any gaps to be addressed. The HS Adhoc group includes Fresno EOC Board Chair Hayes, Commissioners Rodgers, Jaime-Mileham, Brown-Jenkins, Taylor and HS leadership. The first meeting took place on December 18, 2023. Commissioners provided input, feedback and directed staff to develop a Head Start Action Plan to identify areas of improvement.

On February 5, 2024, Head Start leadership and Emilia Reyes, CEO, met with the Ad hoc committee to discuss the Head Start Action Plan that includes the following:

- Culture Needs Assessment
- Listening Sessions
- Employee Survey Feedback
- Restructure of Head Start Program
- Funded Enrollment Initiative
- Community Needs Assessment
- Employee Relations and Workforce Development
- Increase Compensation and Financial Support for Head Start Staff
- Develop a Process and/or Strategy to Recognize Employee
- Performance Management Evaluations
- Professional Development and Training
- Hiring of a new HR Manager for Head Start
- Media Campaign Outreach

On February 6, 2024, the program had their County-Wide Council Meeting for the month of February, quorum was met as we had 33 parents, 4 community representatives and 3 Fresno EOC Board of Commissioners in attendance.

The Head Start Director, CEO, and the adhoc group will continue to meet monthly to keep the board abreast of the program updates, challenges, and concerns. Standing items for the meeting will also include: staffing (separation/hiring) and enrollment. The next meeting has been scheduled for Thursday, March 14, 2024 at 4:00pm.

Other HS Meetings and Deadlines

County – Wide Policy Council met on February 5, 2024 and quorum was met as we had 33 parents, 4 community representatives and 3 Fresno EOC Board of Commissioners in attendance.

Our Office of Head Start (OHS) Program Specialist, Dow-Jane Pei informed us on February 22, 2024 of the approval of the Locally Designed Option request. She stated the Notice of Award would be getting to us soon.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Head Start 0 to 5
Consent Agenda Item #: 8XXVI	Director: Rosa M. Pineda
Subject: Head Start 0 to 5 Selection Criteria	Chief Executive Officer: Emilia Reyes

Recommended Action

The County-Wide Policy Council recommends review and approval of the Head Start 0 to 5 Selection Criteria to the Fresno EOC Board.

Background

Per Performance Standard 1302.14, a program must annually establish selection criteria that weigh the prioritization of selections of participants based on community needs identified the needs assessment. This includes family income, whether the child is homeless or in foster care, the child's age, whether the child is eligible for special education and related services, or early intervention services, as appropriate, as determined under the Individuals with Disabilities Education Act (IDEA) (20 U.S.C 1400 et seq.) and other relevant family or child risk factors.

The Selection Criteria allows our program to identify and enroll children who are most in need of Head Start services. On the following dates: October 18, 2023, November 8, 2023, and December 6, 2023, and January 10, 2024, staff met with the Eligibility Recruitment Selection Enrollment and Attendance (ERSEA) Committee to review and discuss the Selection Criteria to determine if any changes or amendments were necessary. After several meetings, it was determined that the Selection Criteria meets the Head Start Program Performance Standards of 1302.14 as required. No additional changes were recommended at this time.

On February 6, 2024, the County-Wide Policy Council reviewed and approved the Head Start 0 to 5 Selection Criteria.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board Head Start 0 to 5 staff will begin to use the Selection Criteria to guide and recruit children for the 2024-2024 Program Year. If not approved, Head Start 0 to 5 staff will review and make recommended revisions in order to obtain full Board approval.



Applicant's Name: _____ **DOB:** _____ **Site/Area:** _____

AGE/PRENATAL STATUS	CIRCLE ONE
Prenatal or Infant (EHS)	100
1 year (EHS)	80
2 years (EHS)	20
4 years (HS)	80
3 years (HS)	50

INCOME	CIRCLE ONE
Homeless (as defined by McKinney-Vento Act)	130
Foster Child	130
Recipient Public Assistance (TANF/SSI/SNAP)	130
Low income below poverty guidelines	120
Over Income 100 - 130% above poverty guidelines	60
Over Income 130%+ above poverty guidelines	30

DISABILITY	CIRCLE ONE
IFSP (EHS) or IEP (HS)	200

PARENTAL STATUS	CHECK ALL THAT APPLY
Pregnant Woman	60 <input type="checkbox"/>
Legal Guardian/Caregiver	30 <input type="checkbox"/>
One Parent Household	20 <input type="checkbox"/>

INDIVIDUAL AND FAMILY RISK FACTORS (Must be documented)	CHECK ALL THAT APPLY
Written Referral from Community Agency/Professional	50 <input type="checkbox"/>
Teen Parent (17 and younger)	40 <input type="checkbox"/>
Disabled Custodial Parent/Guardian (not receiving SSI)	20 <input type="checkbox"/>
Substance Abuse/Mental Health Issues/Incarceration	20 <input type="checkbox"/>
Exposure to domestic violence and/or community violence	20 <input type="checkbox"/>
Death/Loss of primary parent or caregiver	20 <input type="checkbox"/>

ADDITIONAL FACTORS		CHECK ALL THAT APPLY
Transition from EHS		100 <input type="checkbox"/>
Sibling of a child enrolled in Head Start 0 to 5		50 <input type="checkbox"/>
Staff Print: _____ <div style="display: flex; justify-content: space-between;"> Name Title </div> Staff Signature: _____ Date: _____		Total Points:

Copy: Verification File (IS to enter with application)

Revised/Approved by CWPC	Approved by P&E Committee/Fresno EOC Board of Commissioners
[6/21/06] [10/17/07] [2/20/08] [3/18/09] [1/18/12] [1/14/2015] [7/15/2015] [1/20/16] [2/15/17] [3/21/18] [2/20/19] [5/20/20] [2/2/22] [07/05/22] [02/06/24]	[1/25/12] [7/14/2015] [1/27/16] [2/22/17] [4/18/18] [3/9/19] [6/9/20] [2/9/21-P&E] [03/23/22-P&E] [9/29/22]



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Head Start 0 to 5
Consent Agenda Item #: 8XXVII	Director: Rosa M. Pineda
Subject: Recruitment and Enrollment Policy	Chief Executive Officer: Emilia Reyes

Recommended Action


The County-Wide Policy Council recommends review and approval of the Head Start 0 to 5 Recruitment and Enrollment Policy to the Fresno EOC Board.

Background

Per Head Start Program Performance Standard (HSPPS) 1302.13, a program must develop and implement a recruitment process designed to reach those most in need of services. In addition, a program must include specific efforts to actively recruit children with disabilities and other vulnerable children, such as homeless children and children in foster care. Also, per HSPPS 1302.15, a program must maintain its funded enrollment level and fill any vacancy within 30 days. Every year, the CWPC Eligibility, Recruitment, Selection, Enrollment, Attendance, (ERSEA) Committee reviews and updates the Head Start 0 to 5 Recruitment and Enrollment Policy. This helps us to ensure that we are able to recruit and accept children who are most in need of Head Start 0 to 5 services.

During the following dates: October 18, 2023, November 8, 2023, December 6, 2023, January 10, and February 23, 2024, the staff met with the Eligibility Recruitment Selection Enrollment and Attendance (ERSEA) Committee. The purpose of these meetings was to review and discuss the Enrollment and Recruitment Policy. The aim was to see if any changes or amendments were necessary. After several meetings, the policy was amended in the following areas:

- To revise job titles
- Months of recruitment
- Cited Head Start Performance Standards
- Grammatical revisions
- Revised Target Areas to open boundaries
- Revised Volunteer requirements



On March 5, 2024, the County-Wide Policy Council reviewed and approved the Head Start 0 to 5 Recruitment and Enrollment Policy.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board Head Start 0 to 5 staff will begin to use the Recruitment and Enrollment Policy as a guide to recruit children for the 2024-2024 Program Year. If not approved, Head Start 0 to 5 staff will review and make recommended revisions in order to obtain full Board approval.



POLICY: RECRUITMENT AND ENROLLMENT POLICY Part § 1302 Subpart A

Eligible children will be enrolled in Fresno EOC Head Start 0 to 5 Program regardless of race, sex, creed, color, national origin, or disability.

I. COMMUNITY ASSESSMENT

Fresno EOC Head Start 0 to 5 uses the information from the Community Assessment in the Recruitment & Enrollment for:

- A. Determining the program options that will be implemented.
- B. Determining the recruitment areas that will be served by the grantee.
- C. Determining appropriate locations for centers and the areas to be served by the Home Base program option.
- D. Identifying family and community strengths and concerns and the support network of resources.
- E. Identifying the number of Early Child Care Providers and/or potential partners that will assist our program to meet funded enrollment levels.
- F. The Community Assessment and Selection Criteria form will be presented annually to the Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) Committee for review and/or approval proposed changes. If revisions are proposed, the revisions will be presented on a separate occasion for approval to the County-Wide Policy Council (CWPC) and the Fresno EOC Board.

II. RECRUITMENT

The goal of recruitment is to achieve 100% enrollment at both center and home base options.

- A. Although recruitment is the responsibility of all Fresno EOC Head Start 0 to 5 staff, Family Services staff, Home Base staff and Inclusion staff take the lead in recruitment efforts.
- B. Applications for enrollment in the Fresno EOC Head Start 0 to 5 Program will be accepted year-round.
- C. An active recruitment drive will be conducted by the Family/Community Services staff, Home Base staff and Inclusion staff during the months of March through July.
- D. Recruitment efforts include the following: Fresno EOC Website Online Referrals, distribution of flyers and posters to businesses, churches, health care providers, etc., door to door recruitment in target areas/neighborhoods, participation in community events, block parties, presentations at regional, community and service organizations that provide services to children and families and, utilizing Public Service Announcements through media outlets.

III. ELIGIBILITY

A. Age

- 1. All applicants will be required to provide proof of a child's age by birth certificate or court document. If providing such documents creates a barrier for the family, other documents will be considered on an individual basis.
- 2. To be eligible for Early Head Start, applicant must be pregnant or have a child under 3 years of age. For Head Start, child must be at least 3 years old or turn 3 years old by September 1st

(§1302.12 (b) (2) (i)).

3. Fresno EOC Head Start 0 to 5 children in braided California State Preschool Program (CSPP) must turn 3 years old on or before September 1st to be considered for enrollment in our extended hours/braided programs.
4. Children who will be entering public school the following school year are given priority for enrollment based on selection criteria points.
5. All Fresno EOC Early Head Start children transitioning to Head Start will be given priority for enrollment based on selection criteria points.

B. Income Eligibility Requirements

1. As defined in the Head Start Program Performance Standards §1302.12 (c) a child is eligible if:
 - a) The family's income is equal to or below the Federal Poverty Guidelines, or
 - b) The family is eligible or, in the absence of child care, would be potentially eligible for public assistance.
 - c) The child is homeless, or
 - d) The child is in foster care.

C. Additional Allowances for Programs Over Income Eligibility Requirements

1. As defined in §1302.12 (d) (1) (2) and after outreach to ensure we are meeting the needs of all eligible children.
 - a) Families whose income is between 100 and 130 percent of the Federal Poverty Guidelines will be considered for enrollment per the Selection Criteria. These families can only make up to 35 percent of our program's enrollment.
 - b) Families whose income is above 130 percent of the Federal Poverty Guidelines will be considered for enrollment per the Selection Criteria. These families can only make up to 10 percent of our program's enrollment.

D. Verifying Eligibility

1. The total family income to be used in determining the eligibility of new children in the program should be based on the prior calendar year, or the 12-month period immediately preceding the month in which the application or reapplication for enrollment in Fresno EOC Head Start 0 to 5 is made, whichever more accurately reflects the family's needs.
2. The family income must be verified by the Fresno EOC Head Start 0 to 5 Program before determining that a child is eligible to participate in the program.
3. Parents/Guardians shall be required to provide verification of income by presenting to Fresno EOC Head Start 0 to 5 staff income verification which shall include the collection of any of the following: Individual Income Tax Form 1040, W-2 forms, documentation showing current status as recipients of public assistance, or pay stubs, written statement from employers with year-to-date income. (Refer to the Definition of Income)
4. A Head Start Eligibility Verification form will be attached to the enrollment application and signed by the employee identifying the family's income and how the family's total income was calculated.
5. Children from families that are homeless or children that are in foster care are considered income eligible.

6. If a child is determined eligible and is participating in Early Head Start Program, he or she will remain eligible until the child ages out. If a child is determined eligible and is participating in a Head Start Program, he or she will remain eligible through the end of the succeeding program year except that the Head Start program may choose not to enroll a child when there are compelling reasons for the child not to remain in Head Start, such as when there is a change in the child's family income and there is a child with a greater need for Head Start services.
7. Fresno EOC Head Start children who will be enrolling for a 3rd year of Head Start must verify eligibility again.
8. When a child moves from the Fresno EOC Early Head Start Program to Fresno EOC Head Start, the family income must be re-verified. At the Parent/Guardian's request, Fresno EOC Head Start 0 to 5 will ensure, whenever possible, that the child receives Head Start services until enrolled in school, seamless services 0 to 5 years.

E. Children with Disabilities

1. Every effort will be made to ensure that children who have a certifiable disability are enrolled in order to meet the mandated 10% disability requirement (HSPPS 1302.14 (d) (1).
2. The same policies governing the Fresno EOC Head Start Program eligibility requirements apply to children with disabilities as to all children served in Fresno EOC Head Start 0 to 5.
3. No child may be denied admission to Fresno EOC Head Start 0 to 5 solely on the basis of the nature or extent of a disabling condition unless there is a clear indication that such a program experience may not be in the best interest of the child.
4. Fresno EOC Head Start and transitioning Early Head Start children with verified disabilities who meet eligibility requirements and whose parents desire the child's participation will be given every opportunity to participate in the program.

F. Compliance of Eligibility Regulations

1. Failure of staff to follow the above written policy and who intentionally violate Federal and program eligibility determination regulations are subject to disciplinary actions as outlined in the Fresno EOC Personnel Policies and Procedures Manual.

G. Training on Eligibility (HSPPS 1302.12 (m) (1)

1. A program must train all governing body, policy council, management and staff who determine eligibility on applicable federal regulations and program policies and procedures annually.
2. A program must train staff members who make eligibility determination within 90 days of hiring new staff. Ongoing training will be provided on an individual and group basis. Annual training takes place in the first quarter of the calendar year.
3. Governing body and policy council members must be trained within 180 days of the beginning of the term of a new governing body or policy council.

IV. SELECTION CRITERIA

A. To ensure the neediest families are enrolled in the program, Fresno EOC Head Start 0 to 5 uses a point-based Selection Criteria form based on family income, age, other factors, disability and parental status to select children for enrollment in the Fresno EOC Head Start 0 to 5 Program, including maintaining a waitlist that ranks children according to the Selection Criteria.

B. Parents/Guardians can choose which program option best fits their family's need (Center Base or Home Base). If Parents/Guardians with more than one child choose to enroll each child in a different program option, the Parents/Guardians must choose the governance program in which to exercise their governance parental right (Center Base or Home Base).

C. Family/Community Services/Home Base staff will complete the Selection Criteria for every applicant. ChildPlus reports will be used by Family/Community Services/Home Base staff, to ensure that the highest ranked children enter the program as vacancies occur.

D. When a vacancy becomes available for a class that has been designated by age, the next highest ranked child from the waitlist will be considered for enrollment as classroom ratios allow. The age for a classroom is determined during program option approval by the CWPC and Fresno EOC Board.

E. Children who have been enrolled in Fresno EOC Head Start 0 to 5 and are not kindergarten eligible, may be eligible for continuing enrollment, unless there are compelling reasons for the child not to remain in the program.

V. ENROLLMENT

A. Immunizations

1. Parents/Guardians shall be required to show proof that a child has received all immunizations required by state law or are up to date according to age. Immunizations shall be verified by submitting the child's immunization record that has been completed by either a recognized clinic or physician's office.

B. Target Area Applicants

1. All Target Area applicants who permanently reside within the target area boundaries shall be given priority to enroll in the local Fresno EOC Head Start 0 to 5 Center Base or Home Base Program option.

C. Children of Fresno EOC Head Start 0 to 5 Employees

1. No Fresno EOC Head Start 0 to 5 employees shall be allowed to enroll his/her children in the Fresno EOC Head Start 0 to 5 Program. This includes any child that a Fresno EOC Head Start 0 to 5 employee has legal guardianship and/or power-of-attorney.
2. If the employees' child is in the program prior to his/her Parent/Guardian being employed by Fresno EOC Head Start 0 to 5, the child will be allowed to remain in the program for the current year or any subsequent year, as long as the child remains eligible for the program and under the following conditions:
 - a) Parent/Guardian will relinquish Head Start 0 to 5 Program governance rights.
 - b) If the child's Parent/Guardian is a classroom employee, the child will not be allowed to remain in the same center with the Parent/Guardian unless the center is the only site in that target area.

D. Children Who Are Relatives of Fresno EOC Head Start 0 to 5 Employees

1. If the child is eligible in accordance to Fresno EOC Head Start 0 to 5 Recruitment and Enrollment Policy, he/she will be considered for enrollment in the Fresno EOC Head Start 0 to 5 Program.
2. The child shall not be in the same center as the related employee unless the center is the only site in that target area. The Parent/Guardian will relinquish Head Start 0 to 5 Program governance rights.

E. Volunteers

1. Center Base volunteers must be cleared for immunizations to participate in classroom setting in accordance with Health and Safety Code 1596.7995.

Revised and approved by CWPPC/CWPC	Approved by Fresno EOC Board of Commissioners
[3/18/81] [5/20/81] [1/16/85] [7/15/87] [7/13/88] [8/15/90] [6/28/96] [3/10/99] [1/16/02] [3/16/05] [2/15/06] [2/21/07] [R 7/20/11] [R1/23/13] [5/20/15] [3/16/16] [2/15/17] [03/21/18] [2/20/19] [02/07/23] [03/05/24]	[6/24/81] [2/27/85] [9/23/87] [9/28/88] [R 8/17/11 – 9/28/11] [R 03/27/13][6/24/15] [4/27/16] [3/22/17] [4/18/18] [3/9/19] [04/06/23]



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Local Conservation Corps
Consent Agenda Item #: 8XXVIII	Director: Shawn Riggins
Subject: Local Conservation Corps Senate Bill (SB) 1013 Grant Program (LCC-1)	Officer: Sherry Neil

Recommended Action

Staff recommends ratification for full Board consideration of the Local Conservation Corps Senate Bill (SB) 1013 grant application in the amount of \$799,665, start date is contingent upon receipt of notice to proceed from funder.

Background

In 2023, the State of California approved SB 1013. As of January 1, 2024, this bill revised the definition of “beverage” to include distilled spirits, wine, or wine from which alcohol has been removed in whole or in part, and requires a beverage container that is a box, bladder, or pouch, or similar container, containing wine or distilled spirits to have a redemption payment and refund value of \$0.25.

As part of this legislation, 14 Certified Local Conservation Corps (LCC) were allocated \$10,000,000 as a group, with each LCC receiving \$500,000 for base funding (\$7,000,000), and the remaining \$3,000,000 awarded based on recycling collection production totals. The Fresno LCC received the fourth highest allocation in the state, behind only Oakland, Orange County, and San Jose, and in front of larger cities such as Los Angeles, San Francisco, and San Diego.

Through this grant, the LCC will purchase vehicles to partially replace its aging fleet. Of the existing 15 vehicles, 10 are between 12-29 years old. Purchasing newer vehicles will assist with productivity, increase collection capacity, and reduce down-time due to vehicle repairs. In addition, the LCC will allocate funds for placing ads to educate the public on the new law and assisting in the recruitment of new corpsmembers for the program.

The application was submitted on January 31, 2024, in the amount of \$799,665 over a two year period ending April 1, 2026.

Fiscal Impact

Additional funding under SB -1013 will allow the program to purchase new vehicles without impacting the LCC's annual CalRecycle grant, which can be used for additional recycling training slots. Funding will also provide an opportunity to provide dedicated recruitment and outreach using print and radio ads.

FEOC INTERNAL BUDGET		
Fresno Local Conservation Corps - SB 1013 CalRecycle Grant Program		
PERSONNEL	FTE	PROJECT COST
Salaries		\$ -
FRINGE BENEFITS @ 31%		\$ -
TOTAL PERSONNEL	0.00	\$ -
TRAVEL		\$ -
SUPPLIES		\$ -
CONTRACTOR		\$ -
OPERATING		\$ 25,913
EQUIPMENT		\$ 701,056
PARTICIPANT COSTS		\$ -
TOTAL DIRECT COSTS		\$ 726,969
INDIRECT (10% of DIRECT COSTS)		\$ 72,696
TOTAL		\$ 799,665
MATCH REQUIREMENT		\$ -

Conclusion

If ratified by the Board, this grant will increase LCC's recycling collection capacity and ability to train community members in a safer environment, which aligns with the agency's goals of assisting low-income individuals to become self-sufficient. If not ratified, LCC will need to find alternative funds to replace its older vehicles.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Foster Grandparent Program
Consent Agenda Item #: 8XXIX	Coordinator: Leah Struck
Subject: 2024 AmeriCorps Seniors Foster Grandparent Program Renewal Grant	Officer: Sherry Neil

Recommended Action

Staff recommends ratification for full Board consideration of the 2024 AmeriCorps Seniors Foster Grandparent Program Renewal Grant application in the amount of \$401,468 per year for three years.

Background

Fresno EOC has sponsored the AmeriCorps Foster Grandparent Program (FGP) since 1971. This funding renewal will allow the program to continue for another three years contingent on the submission of a budget per year. Funds for the first year will support 35 existing volunteers and their continued service in rural and urban educational sites. FGP partners senior volunteers with schools, Head Start 0 to 5 locations, and afterschool programs like Boys & Girls Clubs in low-income neighborhoods in Fresno and Madera Counties. Each Foster Grandparent is paired with three to five children for one-on-one tutoring, mentoring, and other academic and social support. Senior volunteers will be responsible for 84 students in year one, with the anticipated outcomes of increasing academic gains, academic engagement, and social emotional skills for 80% of the students served.

The application was submitted on March 7, 2024, in the amount of \$401,468 per year over a three-year period for a maximum amount of \$1, 204,404 from July 1, 2024 to June 30, 2027.

Fiscal Impact

This funding will support the cost of two personnel, mileage, volunteer stipends, recognition for the senior volunteers, marketing to maintain current enrollment, and adding new volunteer sites. There is a 10% match required totaling \$44,610 per year. FGP plans to meet this requirement through meals and snacks for volunteers provided by schools, Head Start 0 to 5, and Boys & Girls Club sites; meeting rooms for monthly in-service days; fundraising and donations.

FOSTER GRANDPARENTS - AMERICORPS SENIORS BUDGET			
12 MONTHS			
JULY 1, 2024 - JUNE 30, 2025			
		CNCS	GRANTEE
PERSONNEL	FTE	AMOUNT	
ASSISTANT DIRECTOR	0.02	2061	
PROGRAM MANAGER	0.80	61,336	
PROGRAM COORDINATOR	1	48,263	
FRINGE BENEFITS		32,476	
TOTAL PERSONNEL		144,135	
OPERATIONS			
STAFF TRAVEL		4,912	
SUPPLIES		1,124	300
VOLUNTEER OPERATIONAL COSTS		14,221	3,500
VOLUNTEER COSTS			
OTHER VOLUNTEER COSTS		36,893	40,810
VOLUNTEER STIPENDS		183,744	
ADMIN (DIRECT COSTS \$164,392 X10%)		16,439	
TOTAL BUDGET		401,468	44,610

CSBG Organizational Standard

Organization has demonstrated partnerships across the community, for specifically identified purposes; utilizes information gathered from key sectors of community in assessing needs and resources; and documents number of volunteers and hours mobilized in support of activities per Category 2, Standard 2.1, 2.2 and 2.4.

Conclusion

If ratified by the Board, this funding will allow FGP to continue providing important services for children and seniors in Fresno and Madera Counties. If not approved, FGP will not accept the funding if awarded and will not be able to continue providing the services that it has been providing to the community for the past 50 years.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Energy Services
Consent Agenda Item #: 8XXX	Director: Joseph Amader
Subject: 2021 Low-Income Home Water Assistance Program (LIHWAP)	Officer: Sherry Neil

Recommended Action

The information presented below is intended to keep the Board apprised of the 2021 Low-Income Home Water Assistance Program (LIHWAP) sunseting on March 31, 2024.

Background

LIHWAP, a one-time, federally funded relief program provided financial assistance to low-income households to reduce water and wastewater arrearages. The California Department of Community Services and Development (CSD) required LIHWAP to model the Low-Income Home Energy Assistance Program (LIHEAP) eligibility requirements.

The original grant cycle for this funding was scheduled to end December 31, 2023, amendment three, agreement number 21W-9003 extended the termination date out until March 31, 2024. As a result, Energy Services was able to serve additional low-income households and received a marginal increase in allocation.

Fiscal Impact

LIHWAP funding will be exhausted on or before March 31, 2024, based on the number of applications being processed.

Conclusion

To date we have served over 3,382 households through participating water providers throughout Fresno County.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Sanctuary and Support Services
Consent Agenda Item #: 8XXXI	Director: Misty Gattie-Blanco
Subject: National Safe Place Week	Officer: Michelle L. Tutunjian

Recommended Action

The information presented below is intended to keep the Board apprised of National Safe Place (NSP) Week being celebrated March 17 – 23, 2024.

Background

National Safe Place (NSP) Week is celebrated nationally during the third full week in March each year. This recognized week honors Safe Place, an outreach and prevention program for youth in crisis. NSP Week serves to recognize the many valued partners who work together to provide immediate help and safety for all young people. It is a dedicated time to acknowledge licensed Safe Place agencies, Safe Place locations, and community partners and volunteers. These individuals and groups are the pillars of strength that support the national safety net for youth.

Fresno EOC has operated the National Safe Place program for over 30 years and operates a network of nearly 130 business, local organizations, as well as over 100 mobile safe place sites.

Safe Place provides individuals, 24 years of age or younger, access to immediate help and safety through a network of community Safe Place sites. These sites open the doors to at-risk youth experiencing abuse, neglect, bullying, serious family struggles, homelessness and more.

During National Safe Place Week, Fresno EOC will be hosting an online training session for existing partner sites, in addition to promoting services and partners through social media, and visiting sites to deliver thank you gifts to partners.

Fiscal Impact

Personnel and travel costs associated with conducting Safe Place activities.

Conclusion

For more information about Fresno EOC's Safe Place project, please visit www.fresnoeoc.org/safe-place



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Local Conservation Corps
Agenda Item #: 9A	Director: Shawn Riggins
Subject: Local Conservation Corps Portfolio – 2023 Strategic Program Progress Report Year 1	Officer: Sherry Neil

Recommended Action

The information presented in this item is intended to keep the Board apprised of the 2023 Strategic Program Progress Report Year 1 for the Local Conservation Corps (LCC).

Background

Celebrating its 30th year of operation in 2023, LCC provides young adults, ages 18-26, in Fresno and surrounding communities with the opportunities and support that enable them to reach their full potential in educational attainment, college and career planning, work ethic, job skills, leadership skills, life skills, civic awareness, and community service. Corps members receive hands-on construction training through home renovations for low-income families, install solar and weatherization measures in low-income neighborhoods, provide recycling services throughout the counties of Fresno and Madera, and engage in small crew conservation and natural resource projects, including forestry, on public lands.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

CSBG Organizational Standard

The organization's governing board receives programmatic reports at each regular board meeting per Category 5, Standard 5.9

Conclusion

The strategic progress report highlights the poverty conditions the program sought to address, the methods used to address these poverty conditions, and how the program partnered with communities to build pathways out of poverty.



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: Finance
Agenda Item #: 10	Director: Steve Warnes
Subject: Agency Financial and Head Start Financial Status Report January 2024	Officer: Jay Zapata

Recommended Action

Executive Committee recommends acceptance for full Board consideration of the interim consolidated financial statements as of January 31, 2024, Agency and Head Start.

CSBG Organizational Standard

The governing board receives financial reports at each regular meeting that include the following per Category 8, Standard 8.7:

1. Organization-wide report on revenue and expenditures that compares budget to actual, categorized by program; and
2. Balance sheet/statement of financial position.

Background

In accordance with the Agency's bylaws, the Finance Committee shall advise in the preparation and administration of the operating budget and oversee the administration, collection, and disbursement of the financial resources of the organization. Additionally, the Treasurer is to ensure the commissioners understand the financial situation of the organization, which includes ensuring that financial statements for each month are available for each meeting of the Board of Commissioners. Monthly financials for Fresno EOC (consolidated) and for Head Start are provided for review and acceptance.

Fiscal Impact

(A) Agency Statement of Activities and Statement of Financial Position:

As of January 31, 2024, the Agency had preliminary revenue of \$12,985,980 million, including \$3.3 million of in-kind contributions, and net operating loss of \$282,170. In comparison, the Agency had revenue of \$13,493,916 million including in-kind of \$3.5 million as of the corresponding period of the preceding year.

(B) Head Start 0-5 Financial Status Report as of Year-to-Date January 31, 2024
This is also represented in the following percentages.

Program Area	% of budget	Notes
Head Start – Basic	11%	
Head Start – Training & Technical Assistance (T&TA)	5%	Training planned for later this year.

Program Area	% of budget	Notes
Early Head Start – Basic	7%	
Early Head Start – Training & Technical Assistance (T&TA)	4%	Training planned for later this year.

Conclusion

Acceptance of these financials by the Board documents the Board's oversight over the financial operations of Fresno EOC. This is part of the Board's fiduciary duty.

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF ACTIVITIES
For The One Month Period Ended January 31, 2024 and 2023

	A	B	A - B	C	D	B - D
	BUDGET JAN - DEC 2023*	ACTUAL JANUARY 2024	BUDGET BALANCE REMAINING	ACTUAL JAN - DEC 2023	ACTUAL JANUARY 2023	ACTUAL 2024 vs 2023 Differences
REVENUES AND SUPPORT						
GRANT REVENUE	\$ 105,694,129	\$ 7,025,432 7%	\$ 98,668,697	86,311,936	\$ 7,211,826	(186,394)
GRANT REVENUE - LENDING CAPITAL	-	-	-	0	-	-
CHARGES FOR SERVICES	22,652,580	2,302,193 10%	20,350,387	24,918,337	2,370,462	(68,268)
OTHER PROGRAM REVENUE	4,998,245	283,510 6%	4,714,735	2,951,641	322,186	(38,675)
CONTRIBUTIONS	384,300	4,435 1%	379,865	116,860	3,439	996
MISCELLANEOUS INCOME	759,253	13,000 2%	746,253	922,493	1,135	11,865
INTEREST & INVESTMENT INCOME	106,000	593 1%	105,407	134,991	2,091	(1,498)
AFFILIATE INTEREST INCOME	765,250	- 0%	765,250	756,052	(27,738)	27,738
RENTAL INCOME	265,843	24,690 9%	241,153	368,618	24,000	690
TOTAL CASH REVENUE	\$ 135,625,600	\$ 9,653,854 7%	\$ 125,971,746	\$ 116,480,927	\$ 9,907,400	(253,546)
IN KIND REVENUE	\$ 39,637,875	\$ 3,332,126 8%	\$ 36,305,749	52,657,103	\$ 3,586,516	(254,390)
TOTAL REVENUE & SUPPORT	175,263,475	12,985,980 7%	162,277,495	169,138,030	13,493,916	(507,935)
EXPENDITURES						
PERSONNEL COSTS	\$ 75,447,335	\$ 7,066,291 9%	\$68,381,044	70,833,954	\$ 5,994,764	1,071,527
ADMIN SERVICES	8,056,855	699,145 9%	7,357,710	7,278,403	626,472	72,673
PROFESSIONAL SERVICES - AUDIT	0	0 0%	0	0	0	-
CONTRACT SERVICES	11,711,120	668,360 6%	11,042,760	10,594,413	1,147,097	(478,736)
FACILITY COSTS	5,770,460	295,193 5%	5,475,267	6,444,884	536,321	(241,127)
TRAVEL, MILEAGE, VEHICLE COSTS	4,737,815	164,431 3%	4,573,384	3,248,366	237,055	(72,623)
EQUIPMENT COSTS	973,690	34,691 4%	938,999	2,146,174	84,090	(49,399)
DEPRECIATION - AGENCY FUNDED	296,000	24,075 8%	271,925	293,861	24,755	(680)
OFFICE EXPENSE	3,199,720	153,742 5%	3,045,978	4,284,681	310,864	(157,122)
INSURANCE	660,930	76,169 12%	584,761	972,297	66,097	10,072
PROGRAM SUPPLIES & CLIENT COSTS	23,493,815	690,076 3%	22,803,739	13,433,542	1,115,958	(425,882)
INTEREST EXPENSE	458,096	1,916 0%	456,180	372,411	3,407	(1,491)
OTHER COSTS	638,159	45,039 7%	593,120	569,913	40,908	4,130
TOTAL CASH EXPENDITURES	\$ 135,443,995	\$ 9,919,130 7%	\$ 125,524,866	120,472,898	\$ 10,187,789	(268,659)
IN KIND EXPENSES	\$ 39,637,875	\$ 3,332,126 8%	\$ 36,305,749	52,657,103	\$ 3,586,516	(254,390)
TOTAL EXPENDITURES	175,081,870	13,251,256 8%	161,830,614	173,130,001	13,774,305	(523,049)
OPERATING SURPLUS (DEFICIT)	\$ 181,605	\$ (265,276)	\$ 446,881	\$ (3,991,971)	\$ (280,389)	15,113
OTHER INCOME / EXPENSE						
TRANSIT GRANT ASSET DEPRECIATION		16,894	(16,894)	206,584	17,665	(771)
NET SURPLUS (DEFICIT)	\$ 181,605	(\$282,170)	463,775	(\$4,198,555)	(\$298,054)	15,885

* Budget for 2024 is pending. Above reflects the 2024 budget.

FRESNO ECONOMIC OPPORTUNITIES COMMISSION
STATEMENT OF FINANCIAL POSITION
As of January 31, 2024

	2024	2023	Differences
ASSETS			
CASH & INVESTMENTS	\$ 12,722,297	\$ 19,784,788	\$ (7,062,490)
ACCOUNTS RECEIVABLE	16,408,755	15,309,517	1,099,237
PREPAIDS/DEPOSITS	783,129	342,212	440,917
INVENTORIES	302,705	172,793	129,912
PROPERTY, PLANT & EQUIPMENT	14,521,963	13,702,966	818,997
NOTES RECEIVABLE (net)	19,320,477	17,115,974	2,204,503
TOTAL ASSETS	\$ 64,059,326	\$ 66,428,250	\$ (2,368,924)
LIABILITIES			
ACCOUNTS PAYABLE	\$ 6,029,701	\$ 5,053,565	\$ 976,136
ACCRUED PAYROLL LIABILITIES	6,448,565.22	5,522,361	926,204
DEFERRED REVENUE	3,183,039	2,063,427	1,119,612
NOTES PAYABLE	15,092,144	16,806,955	(1,714,811)
HEALTH INSURANCE RESERVE	6,940,923	5,317,872	1,623,051
OTHER LIABILITIES	4,119,549	4,178,397	(58,848)
TOTAL LIABILITIES	\$ 41,813,922	\$ 38,942,578	\$ 2,871,343
FUND BALANCE			
CURRENT OPERATING EARNINGS (YTD)	\$ (265,276)	\$ (280,389)	\$ 15,113
UNRESTRICTED NET ASSETS	11,938,306	17,065,085	(5,126,779)
REVOLVING LOAN FUND	556,268	556,268	0
INVESTMENT IN GENERAL FIXED ASSETS	10,016,105	10,144,707	(128,602)
TOTAL FUND BALANCE	\$ 22,245,404	\$ 27,485,672	\$ (5,240,268)
TOTAL LIABILITIES AND FUND BALANCE	\$ 64,059,326	\$ 66,428,250	\$ (2,368,925)

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
January 31, 2024

Description	Head Start - Basic				Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining
Personnel	\$20,210,662	\$2,287,429	\$2,287,429	\$17,923,233	\$0	\$0	\$0	\$0
Fringe Benefits	8,468,009	1,131,072	1,131,072	7,336,937	-	-	-	-
Total Personnel	\$28,678,671	\$3,418,502	\$3,418,502	\$25,260,169	-	-	-	-
Travel	-	-	-	-	50,644	-	-	50,644
Equipment*	-	-	-	-	-	-	-	-
Supplies	665,867	62,476	62,476	603,391	14,706	-	-	14,706
Contractual	2,929,424	130,220	130,220	2,799,204	-	-	-	-
Facilities /Construction								
Other:								
Food Cost	555,870	139,168	139,168	416,702				
Transportation	200,000	3,890	3,890	196,110				
Staff Mileage	85,871	13,169	13,169	72,702				
Field Trips, including Transportation	6,600	0	-	6,600				
Space	642,495	85,269	85,269	557,226				
Utilities / Telephone / Internet	130,000	51,786	51,786	78,214				
Repair/Maintenance Building	245,600	34,640	34,640	210,960				
Repair/Maintenance Equipment	1,707	397	397	1,310				
Property & Liability Insurance	180,750	15,631	15,631	165,119				
Parent Involvement / CWPC	32,377	1,110	1,110	31,267				
Other Costs*	140,422	8,283	8,283	132,139				
Staff & Parent Training	18,244	250	250	17,994	231,739	15,006	15,006	216,733
Total Direct Charges	\$34,513,898	\$3,964,791	\$3,964,791	\$30,549,107	297,089	15,006	15,006	282,083
Total Indirect Charges	\$3,106,251	\$356,831	\$356,831	\$2,749,420	\$26,738	\$1,350	\$1,350	\$25,388
Total Federal Expenditures	\$37,620,149	\$4,321,622	\$4,321,622	\$33,298,527	\$323,827	16,356	16,356	\$307,471
% of Annual Budget Expended to Date			11%				5%	
Non-Federal Share	\$8,622,143	\$371,191	\$371,191	\$8,250,952	\$64,765	\$4,089	\$4,089	\$60,677

4%

*Other Costs Include:
POSTAGE/EXPRESS MAIL
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
EMPLOYEE APPRECIATION

Credit Card Expenses: Credit card statement dated 1/1/24-1/31/24

January 2024 expenses:

Staff Training	\$	250	Teachstone Training - CLASS Toddler Certifications
Program Supplies - Kitchen	\$	13,802	The Webstaurant Store - Kitchen Supplies/Equipment for all Centers
Program Supplies - Disposables	\$	470	Target - Toiletries for children with disabilities
Staff Training	\$	781	American Air - 2024 NHSA Winter Leadership Conference Travel
Staff Training	\$	573	Hyatt Regency - 2024 NHSA Winter Leadership Conference Travel
Staff Training	\$	360	Laura Fink - HS Coaching
Staff Training	\$	1,476	Emily Juricek Coaching - HS Coaching
Telephone	\$	1,749	Frontier Communication - Telephone Service
Internet	\$	322	Frontier Communication - Internet Service
	\$	19,783	

Fresno Economic Opportunities Commission
Head Start/Early Head Start Financial Status
Monthly Report
January 31, 2024

Description	Early Head Start - Basic				Early Head Start - T & TA			
	Annual Budget	Current Expenses	YTD Expenses	Balance Remaining	Annual Budget	Current Expenses	Expenses	Balance Remaining
Personnel	\$5,065,542	\$348,766	\$348,766	\$4,716,776	\$0	\$0	\$0	\$0
Fringe Benefits	1,345,661	128,751	128,751	1,216,910	-	-	-	-
Total Personnel	6,411,203	477,517	477,517	5,933,686	-	-	-	-
Travel	-	-	-	-	44,821	-	-	44,821
Equipment*	-	-	-	-	-	-	-	-
Supplies	102,544	16,537	16,537	86,007	1,289	-	-	1,289
Contractual	277,288	13,028	13,028	264,260	11,526	-	-	11,526
Facilities /Construction	-	-	-	-				
Other:								
Food Cost	378,940	5,869	5,869	373,071				
Transportation	56,097	242	242	55,855				
Staff Mileage	34,129	5,167	5,167	28,962				
Field Trips, including Transportation	1,000	0	-	1,000				
Space	48,360	15,443	15,443	32,917				
Utilities / Telephone / Internet	140,000	4,875	4,875	135,125				
Repair/Maintenance Building	96,087	971	971	95,116				
Repair/Maintenance Equipment	3,983	148	148	3,835				
Property & Liability Insurance	60,250	1,797	1,797	58,453				
Parent Involvement / CWPC	33,268	60	60	33,208				
Other Costs*	35,081	1,583	1,583	33,498				
Staff & Parent Training	10,480	0	-	10,480	101,420	5,643	5,643	95,777
Total Direct Charges	7,688,710	543,237	543,237	7,145,473	159,056	5,643	5,643	\$153,413
Total Indirect Charges	\$691,984	\$48,891	\$48,891	\$643,093	\$14,315	\$508	\$508	\$13,807
Total Federal Expenditures	\$8,380,694	592,128	\$592,128	\$7,788,566	\$173,371	6,151	\$6,151	\$167,220
% of Annual Budget Expended to Date			7%				4%	
Non-Federal Share	\$2,103,842	\$122,566	\$122,566	\$1,981,276	\$34,674	\$1,538	\$1,538	\$41,805

6%

*Other Costs Include:
POSTAGE/EXPRESS MAIL
FINGERPRINTING / BACKGROUND CHECK
RECRUITMENT
EMPLOYEE APPRECIATION

Credit Card Expenses: Credit card statement dated 1/1/24-1/31/24

January 2024 expenses:

Staff Training	\$	125	Teachstone Training - CLASS Toddler Certifications
Program Supplies - Kitchen	\$	3,030	The Webstaurant Store - Kitchen Supplies/Equipment for all Centers
Program Supplies - Nutrition/Medically	\$	443	Manor Drug Medical - Medically Prescribed Formula
Program Supplies - Janitorial	\$	142	Target - Cleaning Supplies for CDC
Program Supplies - Disposables	\$	384	Target - Diapers for CDC
Staff Training	\$	171	American Air - 2024 NHSA Winter Leadership Conference Travel
Staff Training	\$	126	Hyatt Regency - 2024 NHSA Winter Leadership Conference Travel
Staff Training	\$	1,640	Laura Fink - HS Coaching
Staff Training	\$	324	Emily Juricek Coaching - HS Coaching
Telephone	\$	126	Frontier Communication - Telephone Service
	\$	6,510	



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: School of Unlimited Learning
Agenda Item #: 11	Director: Susan Lopez
Subject: Material Revision Petition	Officer: Jack Lazzarini

Recommended Action

Executive Committee recommends moving this item to full Board for approval to submit the School of Unlimited Learning's (SOUL) Material Revision petition to Fresno Unified School District (FUSD).

Background


SOUL was originally chartered in July of 1998. From its inception, SOUL has offered a combination of a Classroom-Based and Independent Study program. Throughout its 24 years, the majority of students have been increasingly enrolled in the Independent Study program. This is in large part due to changing student needs, post pandemic. Currently, 94% of our students are enrolled in the Independent Study program due to outside factors that prevent them from attending school on a daily basis. In addition, data gathered from parent and student surveys show that over 86% of our clients would prefer an Independent Study program over a traditional education model.

SOUL's mission is to provide the best education to meet the changing needs of our student population. The Independent Study program provides the flexibility students need in order to earn credit in a timely manner and increases the likelihood of earning a high school diploma, leading them to success. In addition, students that are on independent studies receive individualized 1:1 student/teacher support, counseling services, case management, and socialization through elective clubs and activities.

The purpose of the material revision is to eliminate SOUL's Classroom-Based program component and enhance its existing Independent Study program as the sole instructional program providing maximum flexibility, individualized in-person support and socialization opportunities.

In order to meet the evolving needs of our student population, the Material Revision Petition was approved by the SOUL Governing Council on February 6, 2024. Council members include Dr. Terry Allen, Chair, Benita Washington, Jimi Rodgers, Larry Metzler, Patrick Turner, Jeanne Starks, Steven Taylor, Julio Romero, Lucy Luttrell, Halle Overton, Kassandra Saavedra, Susan Lopez, Sandy Lomelino, Rena Failla, and Courtney Griffin.

Since then, minor recommended revisions from FUSD have been incorporated. Acceptance by the FUSD board will enable SOUL to enhance our school offering to provide greater individualized



student educational and social support, and reposition us for when we go up for Charter renewal with FUSD in June 30, 2026.

Fiscal Impact

Action on this agenda item will have no fiscal impact as Average Daily Attendance (ADA) funding is the bulk of SOUL's budget regardless of instructional program.

CSBG Organizational Standard

Organization demonstrates low-income individuals' participation in activities and analyzes information collected directly from low-income individuals as part of community assessment per Category 1, Standard 1.1 and 1.2.

Conclusion

If approved by the Board the petition will be submitted to Fresno Unified on March 25, 2024. If not approved by the board, SOUL will continue operating both Classroom Based and Independent Study instructional programs. If petition is not approved by FUSD, there will be no impact on SOUL's current charter.

Executive Summary

By focusing on Independent Study as the school model, SOUL is better able to meet student's individual educational needs by providing a flexible schedule, personalized learning plans and one-on-one attention. In addition, it allows for a greater focus on specific student interests and individualized learning styles. Independent study is not an alternative curriculum. Independent study pupils are expected to meet the same educational standards and outcomes as students in traditional classroom settings. By law, an independent study program must be designed to be equivalent to classroom instruction (CA Dept of Ed). There are many benefits of SOUL's Independent Study program, but most importantly, students have shown academic growth as demonstrated by pre-and post-test results. There has also been an increase in the motivation and confidence of SOUL's students measured by the engagement in their own learning with a higher rate of participation in hybrid classes and extracurricular activities. Students in Independent Study programs gain a greater awareness of their own strengths, as well an increase in their ability to manage personal and family challenges through the help of Support Staff and community referrals. Through one-on-one relationships, teachers have the ability to differentiate tasks based on student's individual needs. Independent Study also benefits students at SOUL by fostering an increase in social inclusion through its many opportunities for student involvement, assigned tutoring hours and an open-door policy for students to be on campus as often as they need.

**School of Unlimited Learning (SOUL)
Material Revision**

Pro

- Academic data shows considerable improvement
- 94% of students currently enrolled in Independent Study track
- More individual time with support staff
- Opportunities to choose their elective classes to their own liking
- Flexibility in scheduling for special populations
- Flexibility in scheduling allows students to be employed
- One on one instruction provides targeted strategies by teachers
- Reflects community demand
- Increased parent participation in student's education
- Creates a sense of teamwork between student, teacher, support staff, and parents
- Small group interaction in elective classes and Interact Club
- Students can attend a session with teacher more than once a week if needed.
- Less peer pressure and classroom disruptions to interfere with instruction
- One subject at a time allows for better concentration
- Fewer discipline issues
- More opportunity for individual counseling

Cons

- Decreased interaction with peers
- No daily direct instruction
- No daily contact with school staff

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1. Request for Material Revision
2. Supporting Documents
3. Updated Budget
4. Affirmations and Assurances
5. Revised Charter Petition (Redlined)
6. Material Revision Governing Board Approval
7. Signed Certification

Insert Letterhead

Via: Email
bob.nelson@fresnounified.org

Insert Date

President Susan Wittrup
Board of Education
Fresno Unified School District
2309 Tulare Street
Fresno, CA 93721

Bob Nelson, Ed.D
Superintendent
Fresno Unified School District
2309 Tulare Street
Fresno, CA 93721

Re: Request for Material Revision

Dear President Wittrup, Members of the Board of Education, and Dr. Nelson:

The Fresno Economic Opportunities Commission, as operator of the School of Unlimited Learning (the “Charter School” or “SOUL”), submits this request for a material revision (the “Material Revision”) to the Fresno Unified School District (“FUSD” or the “District”) Board of Education to revise SOUL’s charter (the “Charter”). The purpose of the Material Revision is to eliminate SOUL’s classroom-based program component, and as a consequence, to maintain SOUL’s existing independent study program as the sole instructional program at the Charter School.

Although a material revision to a charter is required under the law in two limited circumstances for charter modifications not applicable here, (i) adding a new location, or (ii) an expansion to additional grade levels (Education Code Section¹ 47605(a)(5)), SOUL submits this Material Revision in response to the District’s indication that this change to SOUL’s program should be subject to the material revision process.

Section 47607(b) provides, in relevant part, that “material revisions of charters are governed by the standards and criteria described in Section 47605, and shall include, but not be limited to, a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed.” This Material Revision meets these requirements. For the reasons explained below, this Material Revision is appropriate because there is limited demand for SOUL’s classroom-based program and increased demand for the independent study program SOUL has operated for nearly a quarter of a century. Focusing on SOUL’s in-demand independent study program alone going forward is in the best interests of its students and for the Charter School as an organization. SOUL has also updated its Charter to include reasonably comprehensive descriptions of new requirement of charter schools enacted into law after SOUL’s charter was last renewed.

¹ All statutory references herein are to the California Education Code unless stated otherwise.

Description of and Reason for the Revision:

SOUL was authorized in 1998, before the law recognized a specific distinction between classroom-based and nonclassroom-based charter schools. From the beginning, SOUL's Charter has reflected an academic model designed to meet the needs of *at-promise* students (formerly classified as at-risk students) through alternative non-traditional educational programs, specifically, independent study, classroom-based, and hybrid learning programs. As a Dashboard Alternative Status School ("DASS"), SOUL's model has been an asset to the Fresno community, serving a population largely consisting of students who are habitually truant, severely credit deficient, pregnant or parenting, part of the juvenile justice system, and/or and at risk of dropping out of school. The existing Charter reflects a robust independent study program at the core of SOUL's alternative education offering to at-promise youth. (See pp. 5-7, 14-16, 18-20, 25, 30-31, 33-35, 38, 47-48, 51-52, 55, 57-59, 66-67, 70, 77.) Prior to the pandemic, 70% of SOUL students participated in SOUL's independent study programming, and were not in attendance in classrooms as part of a regularly scheduled school day.

During the COVID-19 pandemic when public health orders required the closure of SOUL's campus, SOUL's students and families previously participating in SOUL's classroom-based offerings found that they preferred engaging in learning on a remote, independent study basis. Even as conditions allowed for campus reopening, these students and families have almost universally requested to continue learning through independent study. This Material Revision is thus submitted in response to the needs and preferences of our community, and the importance that SOUL focus its resources and efforts on a single academic program offering rather than two.

Specifically, as reflected in SOUL's 2021-22 Local Control and Accountability Plan ("LCAP") stakeholder feedback on SOUL's independent study and distance learning offerings were highly positive. Students and parents were extremely satisfied with the academic program SOUL offered during the pandemic, including by providing individualized instruction, maintaining ongoing communication with students and parents, and providing critical resources such as academic, personal, and mental health counseling. Feedback and suggestions from students, parents, and staff focused on the importance of program flexibility and independent study, e.g., in lieu of a traditional fixed school-day in a classroom-based setting. Over 86% of parents and students have expressed their preference for individualized instruction over whole classroom instruction, particularly in English language arts and math. Over 95% of SOUL's 208 parents surveyed feel their students are receiving adequate instruction and motivation from teachers to support assigned schoolwork. In addition, over 97% of parents feel their child is safe at SOUL.

Beginning in the Spring semester of 2024, there are 217 students enrolled and only 14 students have chosen to enroll in the daily classroom program. Accordingly, the content in the current Charter related to a classroom-based program offering is not necessary nor applicable to the program the Charter School is operating, and in which students are participating.

Notwithstanding the Material Revision to eliminate SOUL's classroom-based program component, SOUL will maintain its campus facilities as a resource center to support student learning and in-person engagement among teachers and students, but SOUL will not offer a

regularly-scheduled classroom-based school day. All learning will occur on an independent study basis, scheduled flexibly for each student, consistent with the independent study program SOUL has offered since its inception. In addition, small group elective courses are offered with a focus on personal development and career exploration.

To be clear, this Material Revision does not seek to change SOUL from a classroom-based charter school to a nonclassroom-based charter school, as SOUL is already a nonclassroom-based charter school. At all relevant times, the State has recognized SOUL as a nonclassroom-based charter school under the law. (<https://www.cde.ca.gov/fg/aa/pa/documents/ncbcs20.xlsx>.) SOUL has at all times offered nonclassroom-based instruction as defined in Section 47612.5(e)(2), SOUL has claimed its average daily attendance (“ADA”) as nonclassroom-based ADA consistent with 5 California Code of Regulations (“CCR”) Section 11963, and SOUL has continuously earned a 100% nonclassroom-based charter school funding determination from the State Board of Education. (<https://www.cde.ca.gov/sp/ch/documents/fdcompilation071822.xlsx>.)

The California Department of Education (“CDE”) defines a nonclassroom-based charter school as a charter school in which less than 80% of ADA qualifies as classroom-based ADA (<https://www.cde.ca.gov/sp/ch/ncbdltrfy2022.asp>). SOUL has at all times operated a program in which less than 80% of ADA qualifies as classroom-based ADA, and has never attested in its charter that it would meet the funding standards applicable to a classroom-based charter school. Although SOUL has historically offered some classroom-based instruction as one aspect of its overall program, it has done so as a *nonclassroom-based charter school* offering classroom-based instruction on a limited basis. Again, this Material Revision does not convert SOUL from a classroom-based charter school to a nonclassroom-based charter school because SOUL is already a nonclassroom-based charter school. This Material Revision only reflects a modification of SOUL’s academic program offerings, in the interests of serving students through their preferred method of learning and to operate SOUL as efficiently and effectively as possible.

Impact of the Changes to the Educational Program

As described above, the Material Revision is intended to conform the content of SOUL’s Charter Petition to reflect SOUL’s operation as a 100% nonclassroom-based/independent study program, and does not constitute a substantive change to SOUL’s educational program. SOUL’s core educational program will be unchanged, and students will continue to have access to in-person learning opportunities and programming at SOUL’s resource center, however, SOUL will not offer a fully in-person traditional classroom-based program. Again, the elimination of the fully classroom-based program is in response to community preferences and needs.

Fiscal Impact of the Change

The Material Revision will not have any material fiscal impact on the Charter School because the Material Revision is not expected to result in a decrease or increase in enrollment, revenues, or expenses. The Material Revision is intended to conform SOUL’s Charter to reflect SOUL’s existing operations as a nonclassroom-based charter school operating a program in which 100% of students participate in independent study.

Charter Elements Impacted by the Change

As demonstrated in the attached Material Revision, provided in redline, SOUL has revised the content in Elements A, B, and C to eliminate its classroom-based program offering, and to clarify SOUL's independent study program as the sole academic program going forward. To be clear, as this is a material revision, SOUL has modified only those programmatic elements particular to the classroom-based program, and the Material Revision does not reflect full updates to Elements A, B, and C that would appropriately be made at the time of renewal.

Description of Any New Requirements of Law Since the Charter Was Last Renewed

The attached Material Revision incorporates legal content updates to each element in redline as necessary to achieve a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed. The redline in each element includes the description of new requirements and are fully incorporated herein; those updates include the following:

- Updating affirmations to reflect current statutory language and revised citations (pp. *see* 3-5)
- Updating governing law in each element to reflect current statutory language and revised citations (*see* pp. 12, 40, 68, 74, 78, 80, 85, 89, 90, 100, 102, 105, 109-111)
- Element D (Governance): Updates to reflect conflict of interest code requirements and applicability of the Political Reform Act and Government Code Section 1090; updates to reflect the right of students to petition for a student representative on SOUL's governing board.
- Element E (Employee Qualifications): Updates to reflect availability of local assignment options to charter schools and transition period for credentialing of any noncore teachers.
- Element F (Health and Safety): Updates and additions to describe various health and safety requirements applicable to charter schools, including with respect to background check procedures, medications in school, school safety plan, workplace violence prevention plan, comprehensive anti-discrimination and harassment policies and procedures, bullying prevention, etc. (*See* pp. 80-85.)
- Element G (Student Population Balance): Updates to reflect legal requirement for population balance plan to include special education students and English learner students.
- Element H (Admission Policies and Procedures): Updates to reflect terms per Education Code Sections 49011, 47605(e)(2)(B)(iv), 47605(e)(4)(B), 47605(e)(4)(A), and 47605(e)(4)(D); updates to reflect lottery procedures.
- Element I (Audit): Updates to conform with Sections 47605(c)(5)(I), 47605(m), and 47607(f)-(h).
- Element J (Suspension and Expulsion): Updates to policies and procedures to conform with legal requirements.
- Element O (School Closure): Update to procedures to conform with edits to Education Code Section 47605(c)(5)(O).

Timeline

Material revisions are governed by the same standards and criteria that apply to new charter petitions as set forth in Education Code 47605, (Section 47607(b), including the timing requirements for charter petitions to be heard. Under Section 47605(b), “[n]o later than 60 days after receiving a petition, ... the governing board of the school district ***shall hold a public hearing on the provisions of the charter***, at which time the governing board of the school district shall consider the level of support for the petition by teachers employed by the school district, other employees of the school district, and parents.” (Emphasis added.) Thereafter, “[f]ollowing review of the petition and the public hearing, the governing board of the school district ***shall either grant or deny the charter*** within 90 days of receipt of the petition, provided, however, that the date may be extended by an additional 30 days if both parties agree to the extension.” (Emphasis added.) These timelines are commenced “for purposes of commencing the timelines described ... on the day the petitioner submits a petition to the district office, along with a signed certification that the petitioner deems the petition to be complete.”

There is no requirement in Sections 47605 or 47607 that a material revision must be sought prior to the school year in which it will be effective. A material revision is effective as soon as it is approved by the District’s Board of Education.

* * *

SOUL sincerely appreciates the District’s support and partnership in service to our families and students and looks forward to working with the District on this Material Revision. Please feel free to contact me if any questions arise.

Sincerely,

Emilia Reyes
Chief Executive Officer
Fresno Economic Opportunities Commission

Enclosures

School of Unlimited Learning

Material Revision - Budget Impact Statement

The attached multi-year budget projection shows approximately 80% of SOUL's current funding is based on revenue limit sources, in particular, Average Daily Attendance (ADA). SOUL is projecting our ADA compensation rate to maintain or increase it's rate due to the fact we will continue to have an enrollment of 220 students. This enrollment number has been consistent for the past 2 years.

The Independent Study students have traditionally earned a higher ADA rate than the traditional classroom-based program students partly due to the flexibility that the Independent Study format offers. This past P-1 reporting period showed another increase in ADA percentage rates.

Transitioning to a full Independent Study program will not cause any changes to our budget. We will continue to budget each year according to the funding sources available to us.

**2023-2026
CHARTER SCHOOLS
Multi-Year Projection**

CHARTER NAME:

School of Unlimited Learning

CHARTERING AUTHORITY: (if applicable)

Fresno Unified School District

UNRESTRICTED (Resources 0000-1999)

REVENUES AND OTHER FINANCING SOURCES

		2023/2024	2024/2025	2025/2026
Revenue Limit Sources	8010-8099	3,126,638	3,296,447	3,471,564
Federal Revenues	8100-8299	435,160	90,500	90,500
Other State Revenues	8300-8599	306,448	221,695	223,912
Other Local Revenues	8600-8799	7,000	7,000	7,000
Other Financing Sources	8910-8999	-	-	-

Total, Revenues

3,875,246 3,615,642 3,792,976

EXPENDITURES AND OTHER FINANCING USES

Certificated Salaries	1000-1999	1,212,630	1,236,883	1,255,436
Classified Salaries	2000-2999	551,895	562,933	571,377
Employees Benefits	3000-3999	533,022	543,682	551,837
Books and Supplies	4000-4999	302,665	308,718	313,349
Services, Other Operating Expenses	5000-5999	1,275,034	963,426	1,100,977
Capital Outlay	6000-6999	-	-	-
Other Outgo (excl. Direct Support/Indirect Costs)	7100-7299,7400-7499	-	-	-
Direct Support/Indirect Costs	7300-7399	-	-	-
Other Financing Uses	7610-7699	-	-	-

Total, Expenditures

3,875,246 3,615,642 3,792,976

Net Increases/(Decreases) in Fund Balance

- - -

FUND BALANCE

Net Beginning Fund Balance	9791	1,897,898	1,897,898	1,897,898
TOTAL, Ending Fund Balance	9790	1,897,898	1,897,898	1,897,898

DISTRICT BUDGET ASSUMPTIONS:

Revenue Assumptions:

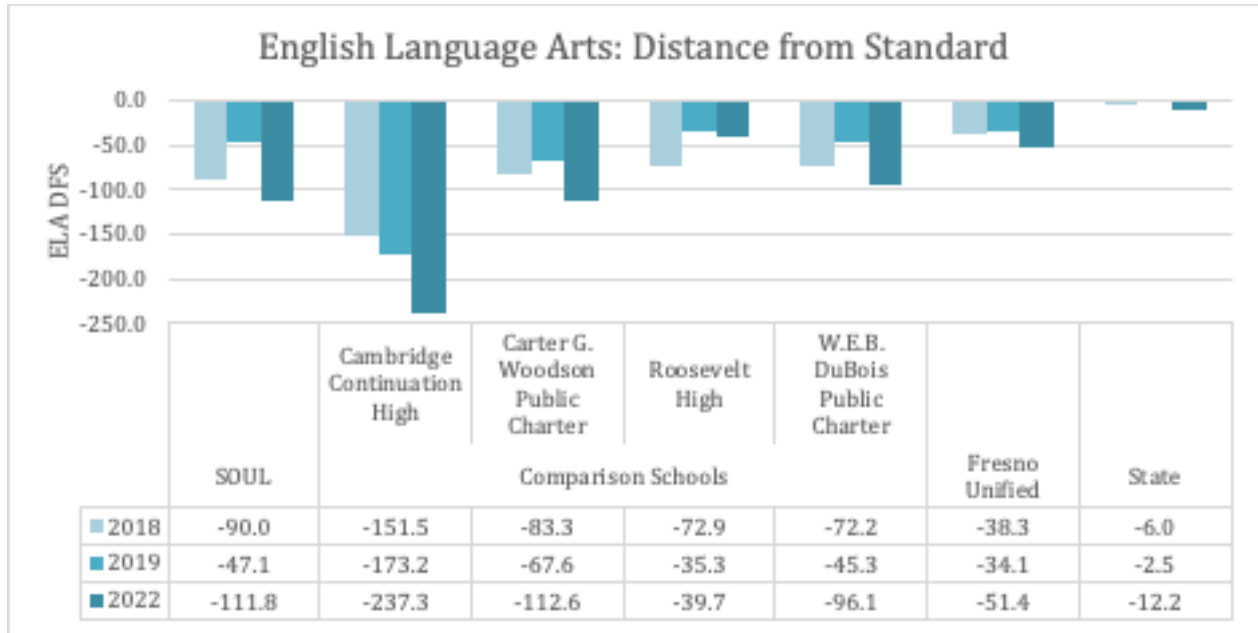
Expense Assumptions:

The School of Unlimited Learning (SOUL) has been accredited through Western Association of Schools and Colleges (WASC) since 2014. In the Spring of 2023, SOUL received the highest accreditation awarded of 6 years. SOUL has had all of its core curriculum courses A-G approved through the University of California system, along with numerous electives, totaling 26 courses that have received the A-G distinction. SOUL received the Dashboard Alternative School Status (DASS) in 2018 in recognition of the unique student population it serves. More than 70% of students arrived at SOUL severely credit deficient. It's not unusual for a student to enroll in their fourth year of high school with credits only through ninth grade. Additionally, SOUL's student population tends to be highly transient, with 37% of students in the 2022-23 school year having changed schools three or more times since 9th grade. This trend has increased in recent years, in part because of student disengagement in learning during the pandemic school closures.

The school's enrollment includes 90% of students residing in economically depressed areas. Most of the students, 85%, have a history of low academic achievement due primarily to low attendance in their previous schools. The school's population, fluctuates throughout the year between 180-220 students, and is largely defined as students who are habitually truant, severely credit deficient, pregnant or parenting, or part of the juvenile justice system, and at risk of dropping out of school. Nearly 80% of all students who enroll are severely skill deficient in math and/or reading. In addition, 37% of our student body has a high mobility rate and has attended three or more schools. Studies have shown that students who change high schools three or more times are 50% less likely to graduate from high school. Furthermore, every time a student switches schools they experience a learning loss of six to nine months. Over the past three years the average entry reading level for students has been 6.5 grade level, whereas the math level averages a 5.5 grade level.

English Language Arts (ELA): Trend & Data Analysis. SOUL's Dashboard performance in ELA improved from 2018 to 2019 but declined in 2022, the first-year students were tested post-pandemic. The improvement from 2018 to 2019 was primarily due to a substantial reduction in the percentage of students scoring in the lowest achievement level, from 49% to 34% of students. SOUL's overall performance in 2022 was better than two of the four comparison high schools in the district, but it is still below the state average, which represents all students tested in grades 3-8 and 11.

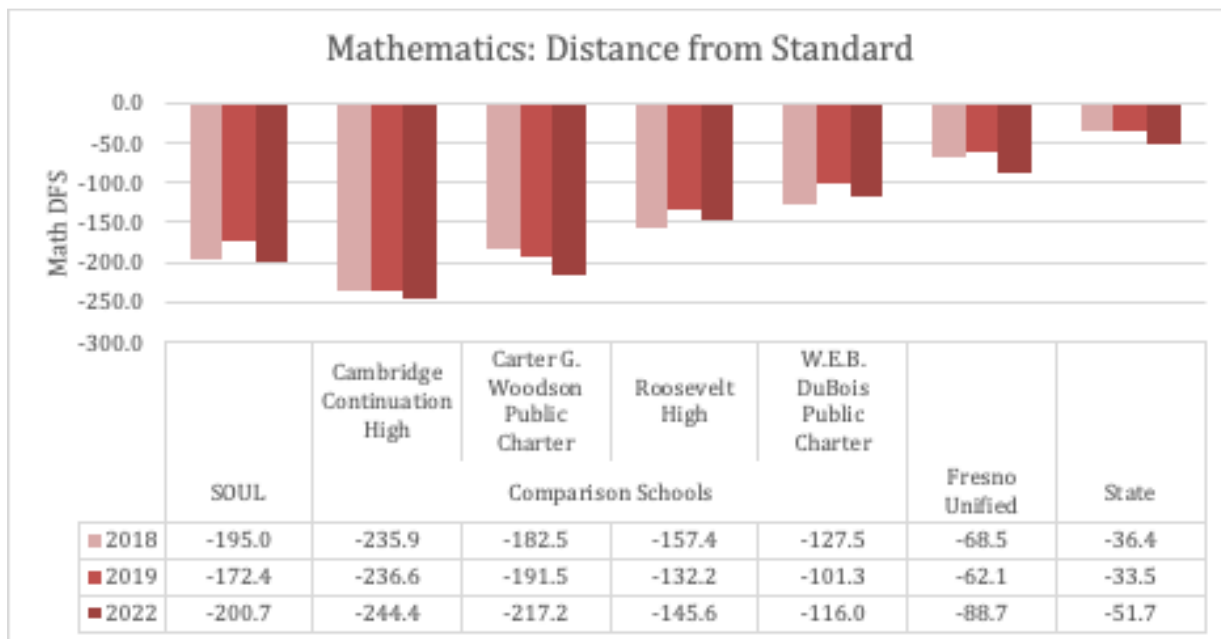
Dashboard Distance from Standard in ELA



Source: CA School Dashboard

Math: Trend & Data Analysis. Like the state, district, and its comparison schools, SOUL's student performance on the Math state test is weaker than in English language arts. Dashboard scores climbed from 2018 to 2019 but declined in 2022. In 2022, SOUL outperformed two of its four comparison high schools. Over the last three years, SOUL has not had any 11th grade students meet the standard in Math. SOUL has experienced a reduced percentage of students scoring in the lowest achievement level over the last three years, from 95% in 2017 to 80% in 2022. The 2022 decline on the Dashboard is not reflected in the overall Smarter Balanced Summative Assessments (SBAC) performance by achievement level reported on DataQuest; this is because the Dashboard represents a smaller group of students who were continuously enrolled since census day, and DataQuest shows all students with valid scores from the test administration.

Dashboard Distance from Standard in Math



Learning Loss from Pandemic: While this is a statewide issue, some of our students who lacked adequate access to computers/internet/support at home did not “attend” school during the 2020-2021 academic year. When they returned to school in 2021-2022 they were unprepared and unsupported trying to re-acclimate to a school setting. As noted, SOUL has experienced an increase in students who have missed entire school years and are now tasked with making up lost time to graduate. Despite these challenges, SOUL has been administering NWEA Measures of Academic Progress (MAP) assessments consistently since 2021-2022, and while there are still a lot of growth opportunities, we are better informed on how to target support.

Northwest Evaluation Association (NWEA) is a summative and formative set of assessments designed to complement each other and provide the appropriate data for decision-making at every level of an education agency. MAP Growth is an assessment that provides information about student achievement during a particular academic year and tracks changes in student achievement (i.e., growth) over multiple terms and multiple administrations of the tests during an academic year allows the school, teacher and student the ability to compare students’ achievement.

Trends in the Data. SOUL administers NWEA’s Measures of Academic Progress (MAP) growth assessments three times a year – fall, winter, and spring – in math and language usage to all students in grades nine through twelve. MAP testing has occurred consistently each year from 2018-19 through 2022-23, although spring 2020 testing was canceled due to the pandemic.

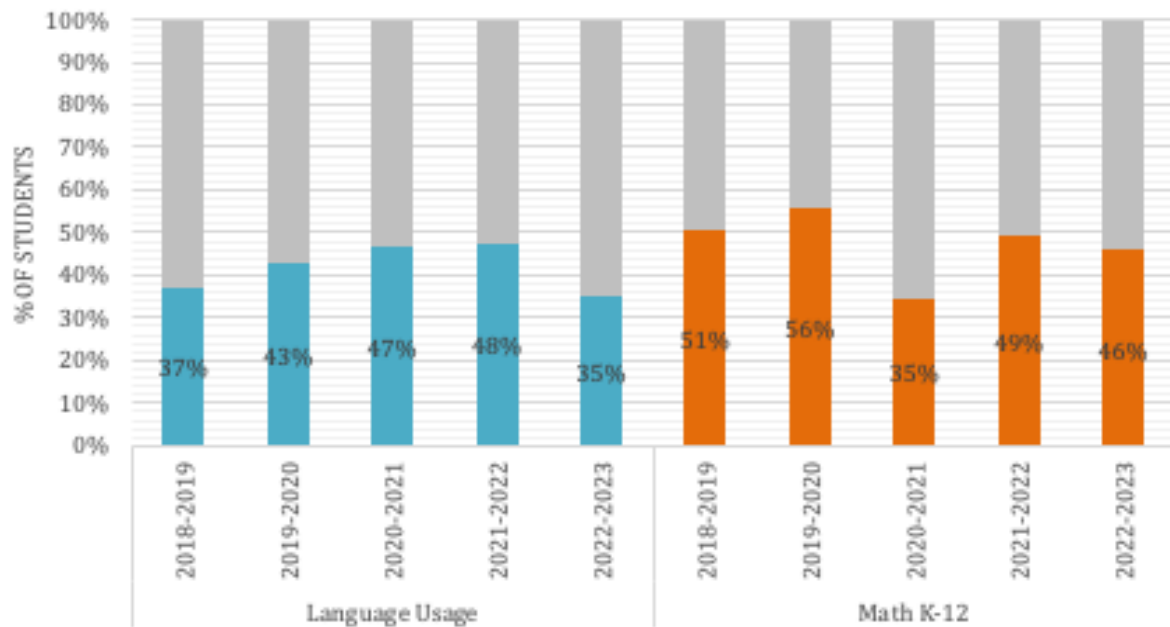
MAP is a nationally normed assessment that provides benchmarks for student performance based on a student's grade level and starting performance level. SOUL evaluates student performance compared to grade level norms and tracks growth each year from the first to the last test taken. Due to the transient population, the growth measured can be from fall to winter, winter to spring, or fall to spring. Since the MAP language arts assessment only provides growth norms through eleventh grade, it's not possible to analyze language arts performance by students in their fourth year or later.

Trend & Data Analysis. Students entering SOUL are typically performing more than three grade levels below expectations. Through NWEA MAP, SOUL focuses on meeting students where they are at and achieving growth over time. In both math and language arts, the percentage of students in the lowest quintile (1st-20th percentile) has decreased over the last five years, from 64% to 57% in math and 42% to 36% in language usage.

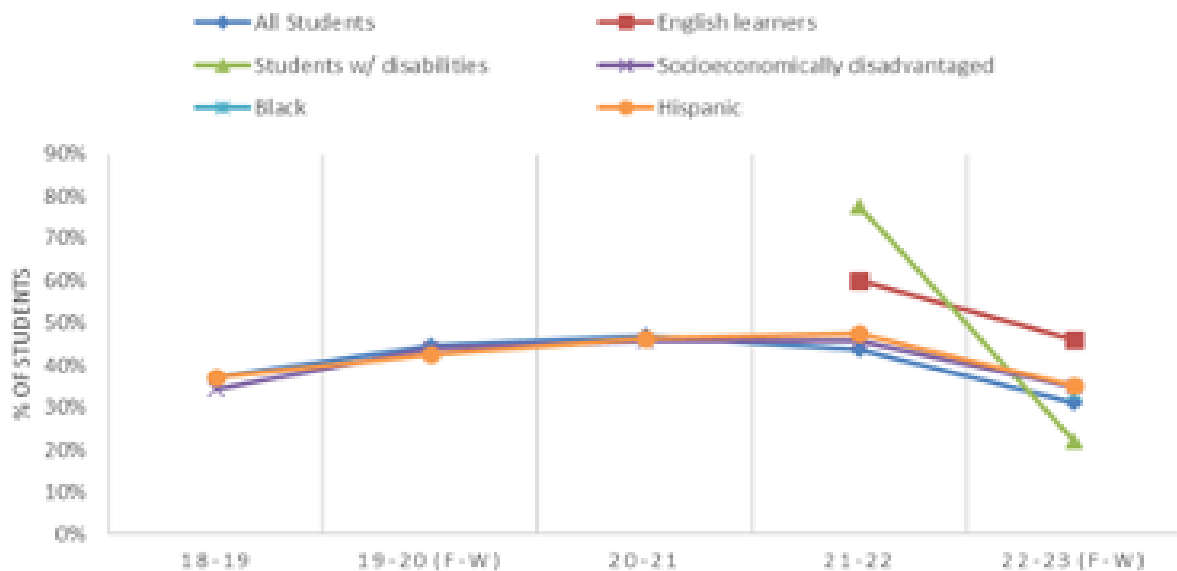
Similar to the SBAC assessments, SOUL's performance in language usage is consistently stronger than math each year, and a greater percentage of students are average or above in language usage. The average or above percentage grew five points in language usage from winter 2021-22 to winter 2022-23. Performance stayed flat for math for the same period.

Students are assigned unique growth targets based on the subject tested, starting level, and instructional period. Most years, approximately half of SOUL students meet their growth targets for the year. From fall to winter 2022-23, growth is strongest for English learners and students with disabilities in math and English learners in language usage.

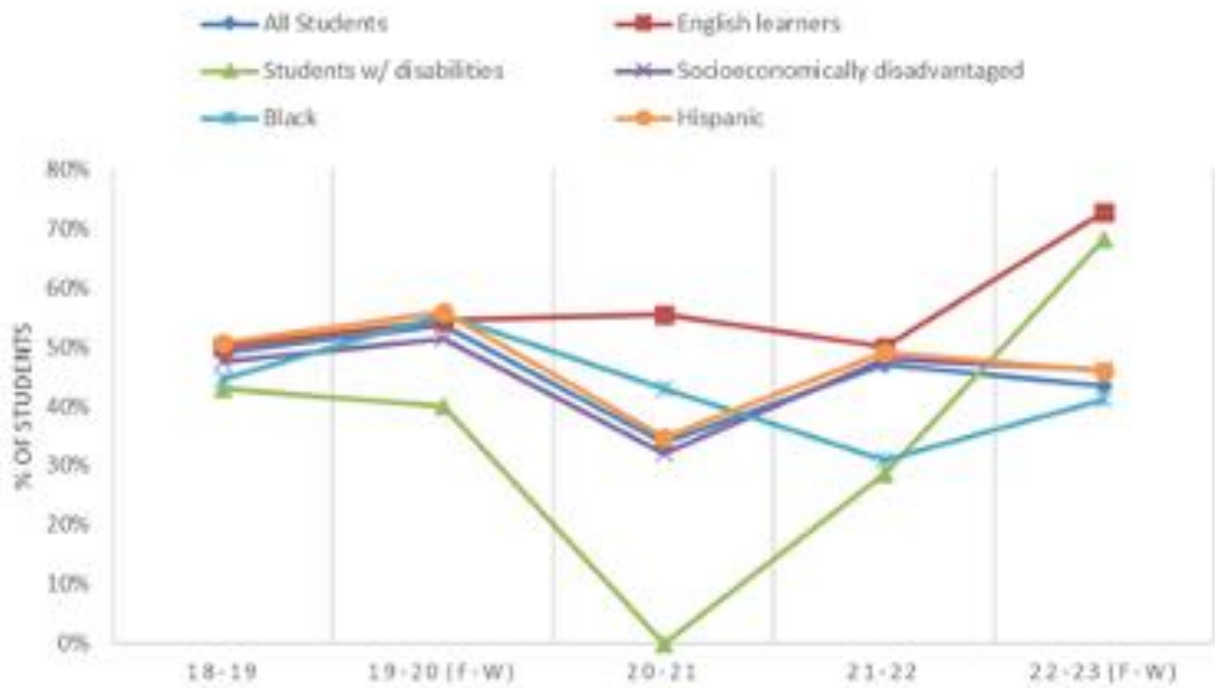
MAP: Percentage Meeting Annual Growth Target By School Year



MAP LANGUAGE USAGE: MEETING GROWTH TARGET



MAP MATH: MEETING GROWTH TARGET



CAASPP SCORES

SOUL 2022 CA Dashboard	SOUL 2023 CA Dashboard	Similar Schools 2023 CA Dashboard
<p>CAASPP ELA Performance: 11th Grade</p> <p>Status: Very Low</p> <p>111.8 points below standard</p> <p>Growth: No data in 2020 or 2021 for comparison</p>	<p>CAASPP ELA Performance: 11th Grade</p> <p>Status: Low</p> <p>53.9 points below standard</p> <p>Growth: Increased by 57.9 points</p>	<p>CAASPP ELA Performance: 11th Grade</p> <p><u>Carter G Woodson</u> Status: Low 101.2 points below standard Increased by 11.3 points</p> <p><u>McLane High School</u> Status: Low 63.3 points below standard Increased by 30.6 points</p>
<p>CAASPP MATH Performance 11thGrade</p> <p>Status: Very Low</p> <p>200.7 points below standard</p> <p>Growth: No data in 2020 or 2021 for comparison</p>	<p>CAASPP MATH Performance 11th Grade</p> <p>Status: Low</p> <p>187.4 points below standard</p> <p>Growth: Increased by 53.9 points</p>	<p>CAASPP MATH Performance 11th Grade</p> <p><u>Carter G Woodson</u> Status: Low 209 points below standard Increased by 8.1 points</p> <p><u>McLane High School</u> Status: Low 172 points below standard No Increase</p>
<p>English Learner Progress</p> <p>Less than 11 EL students tested</p> <p>Data not displayed for privacy</p>	<p>English Learner Progress</p> <p>Making Progress towards Eng Lang Proficiency:</p> <p>61.1%%</p>	<p>English Learner Progress</p> <p>Carter G Woodson: Making Progress towards Eng Lang Proficiency: 41.7%</p> <p>McLane High School: Making Progress towards Eng Lang Proficiency: 31.1%</p>

English Language Arts/Literacy and Mathematics

Smarter Balanced Summative Assessments

Test Results at a Glance

School: School of Unlimited Learning

CDS Code: 10-62166-1030642 | County: Fresno | District: School of Unlimited Learning

Report Options

Year: 2022–23

Grade: All Grades

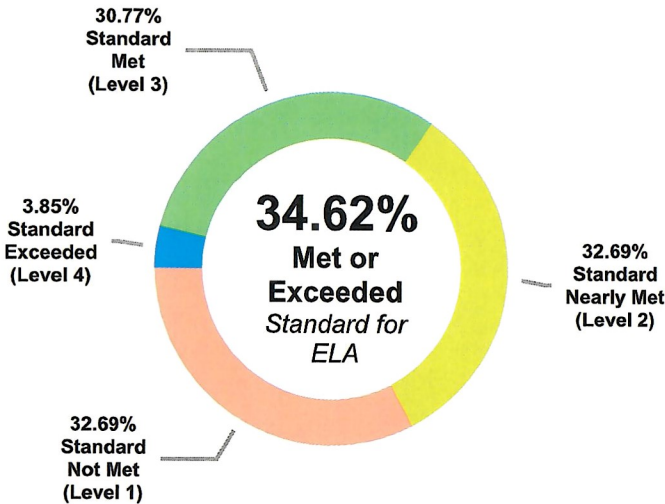
Student Group: All Students (Default)

School Type: All Schools

Selections Applied

ELA

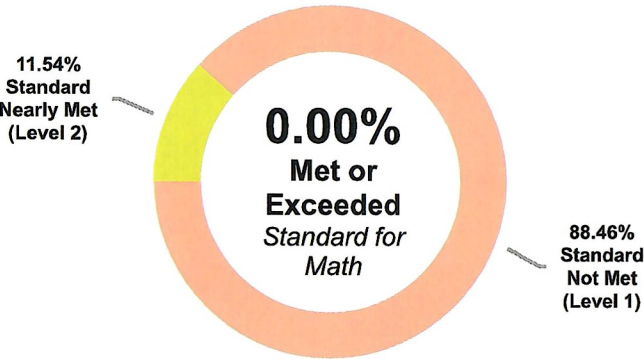
Percent of students within each achievement level



VIEW ELA DETAILED TEST RESULTS

Mathematics

Percent of students within each achievement level



Standard Met (Level 3) is 0.00%
Standard Exceeded (Level 4) is 0.00%

VIEW MATH DETAILED TEST RESULTS

ADD TO COMPARE →

Add this entity to comparison and find other entities to compare it to.

SCHOOL-DISTRICT-STATE COMPARISON →

Search for a school to compare its results to the district and state.

CHANGE OVER TIME →

View how a group/cohort of students has progressed.

PERFORMANCE TREND REPORTS →

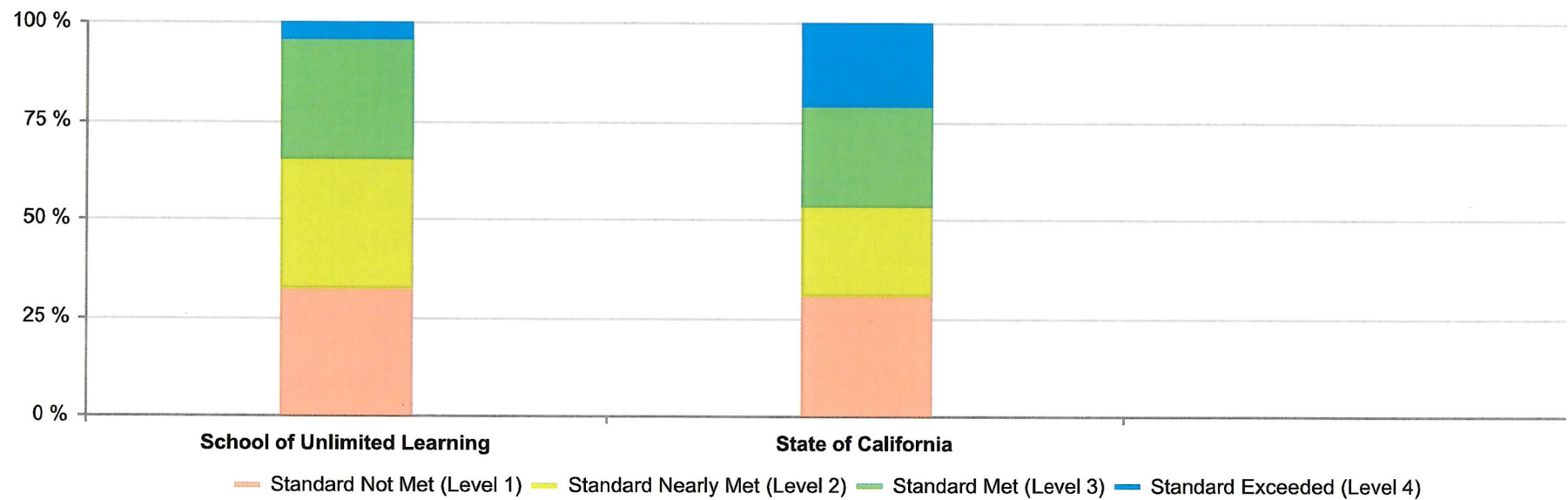
View the performance of two different student groups within a single grade over time.

RESEARCH FILES →





Get files for complex analyses and customized reporting.

▼ Data Detail - All Students (accessible data)

2022–23 Achievement Level Distribution - All Grades

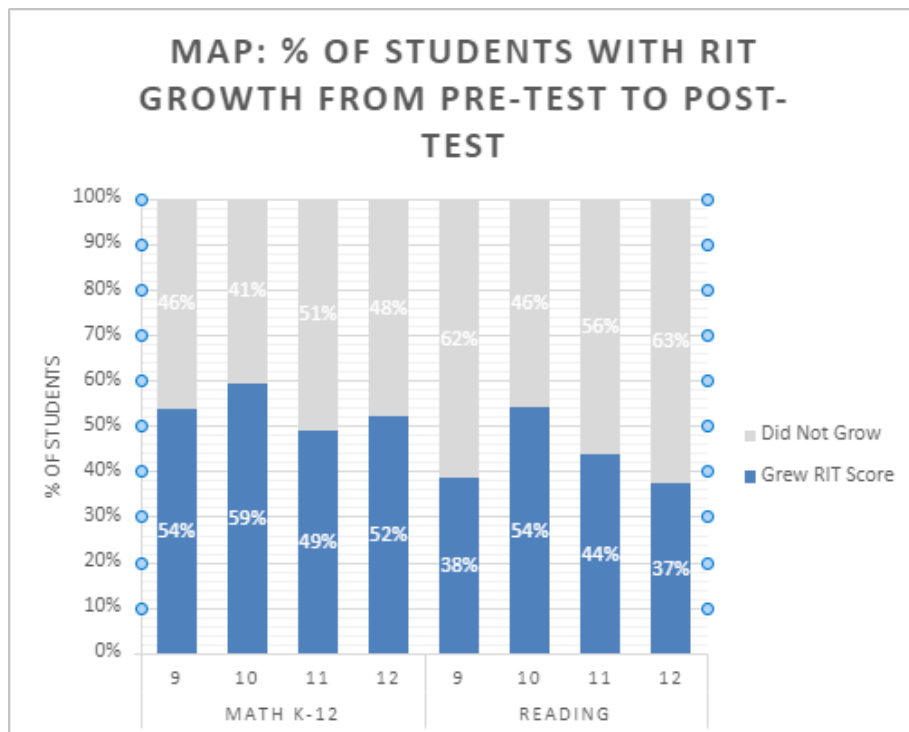


Overall Achievement

Reporting Categories	School of Unlimited Learning	State of California
Mean Scale Score	N/A	N/A
 Standard Exceeded (Level 4) ⁱ	3.85 %	20.73 %
 Standard Met (Level 3) ⁱ	30.77 %	25.93 %
 Standard Nearly Met (Level 2) ⁱ	32.69 %	22.17 %
 Standard Not Met (Level 1) ⁱ	32.69 %	31.17 %

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test Fall to Winter 2023-2024

Count of StudentID	Column Labels		
	Grew RIT Score	Did Not Grow	Total
Math K-12	53%	47%	100%
9	54%	46%	100%
10	59%	41%	100%
11	49%	51%	100%
12	52%	48%	100%
Reading	43%	57%	100%
9	38%	62%	100%
10	54%	46%	100%
11	44%	56%	100%
12	37%	63%	100%
Total	48%	52%	100%

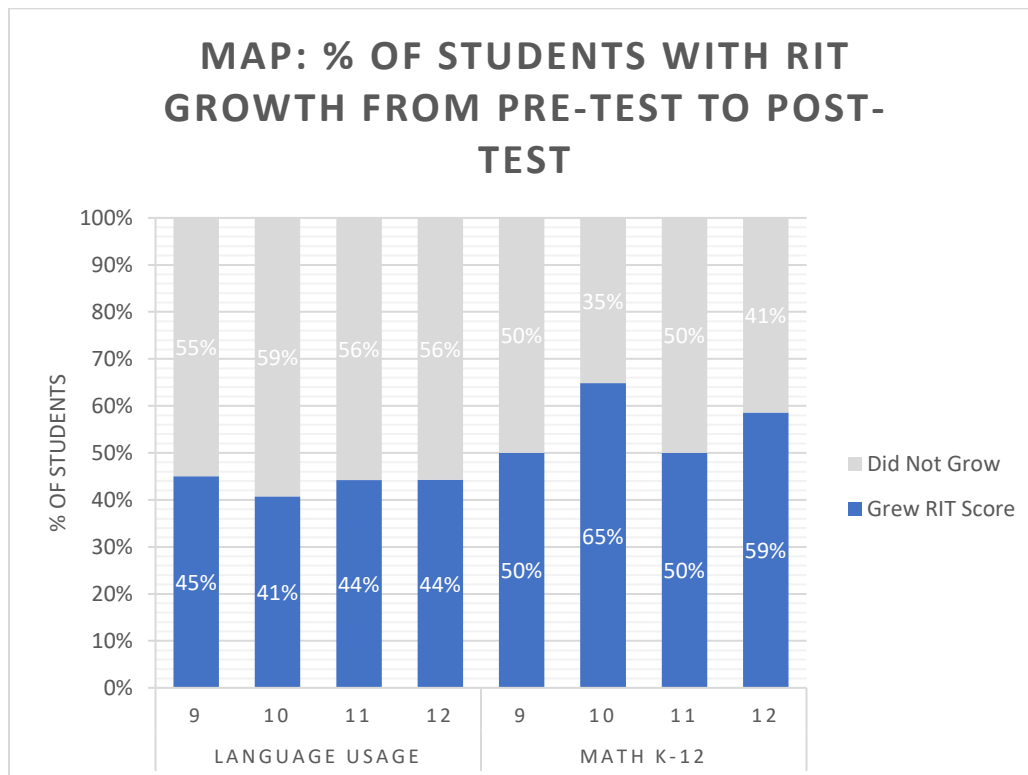


2022-2023

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test

This graph looks at the percentage of students who achieved RIT score growth from pre-test to post-test.

Count of StudentID	Column Labels		
Row Labels	Grew RIT Score	Did Not Grow	Total
Language Usage	43%	57%	100%
9	45%	55%	100%
10	41%	59%	100%
11	44%	56%	100%
12	44%	56%	100%
Math K-12	57%	43%	100%
9	50%	50%	100%
10	65%	35%	100%
11	50%	50%	100%
12	59%	41%	100%
Total	50%	50%	100%

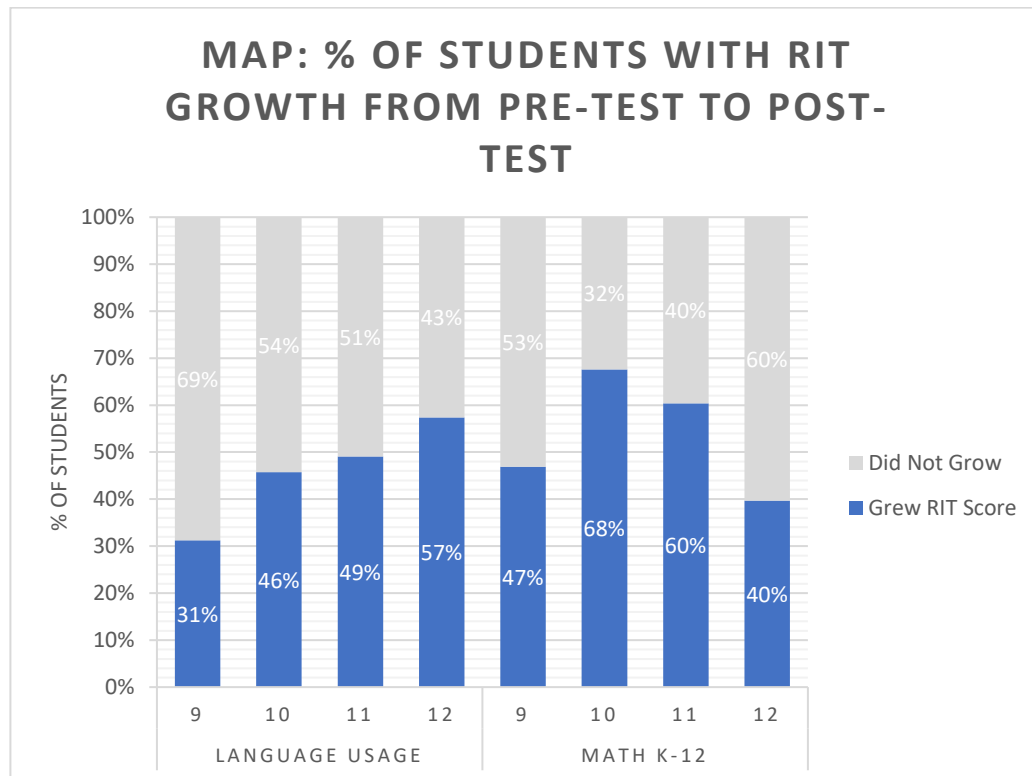


2021-2022

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test

This graph looks at the percentage of students who achieved RIT score growth from pre-test to post-test.

Count of StudentID Row Labels	Column Labels		Total
	Grew RIT Score	Did Not Grow	
Language Usage	48%	52%	100%
9	31%	69%	100%
10	46%	54%	100%
11	49%	51%	100%
12	57%	43%	100%
Math K-12	52%	48%	100%
9	47%	53%	100%
10	68%	32%	100%
11	60%	40%	100%
12	40%	60%	100%
Total	50%	50%	100%

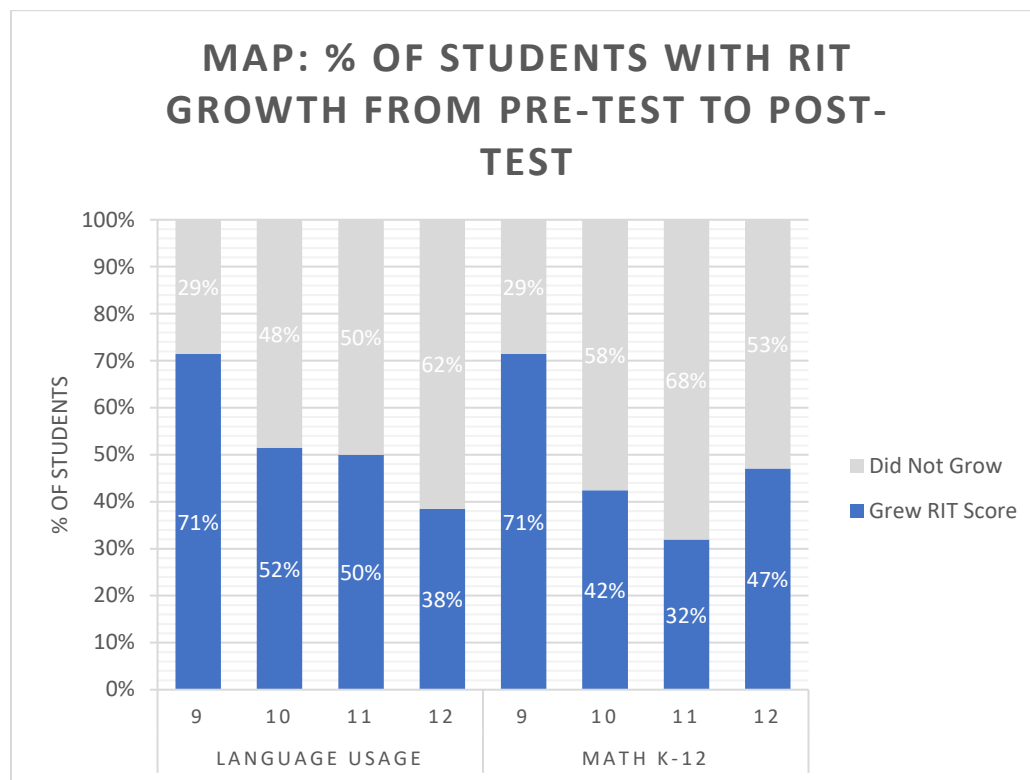


2020-2021

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test

This graph looks at the percentage of students who achieved RIT score growth from pre-test to post-test.

Count of StudentID	Column Labels		
Row Labels	Grew RIT Score	Did Not Grow	Total
Language Usage	47%	53%	100%
9	71%	29%	100%
10	52%	48%	100%
11	50%	50%	100%
12	38%	62%	100%
Math K-12	42%	58%	100%
9	71%	29%	100%
10	42%	58%	100%
11	32%	68%	100%
12	47%	53%	100%
Total	45%	55%	100%

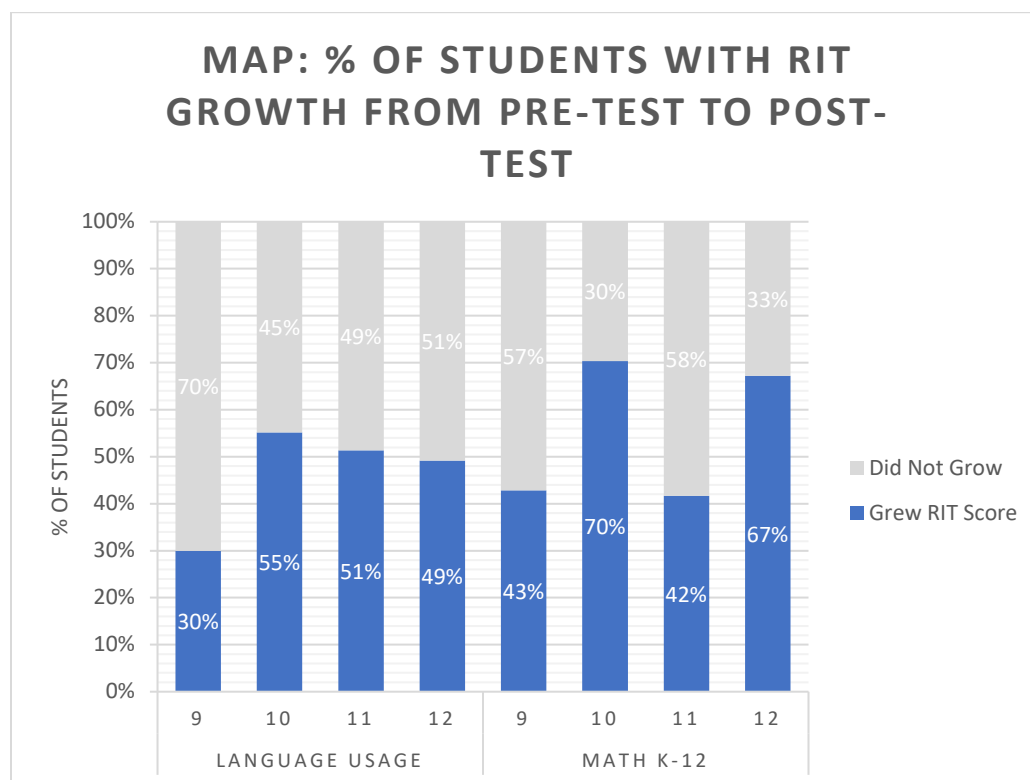


2019-2020

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test

This graph looks at the percentage of students who achieved RIT score growth from pre-test to post-test.

Count of StudentID	Column Labels		
Row Labels	Grew RIT Score	Did Not Grow	Total
Language Usage	50%	50%	100%
9	30%	70%	100%
10	55%	45%	100%
11	51%	49%	100%
12	49%	51%	100%
Math K-12	59%	41%	100%
9	43%	57%	100%
10	70%	30%	100%
11	42%	58%	100%
12	67%	33%	100%
Total	54%	46%	100%

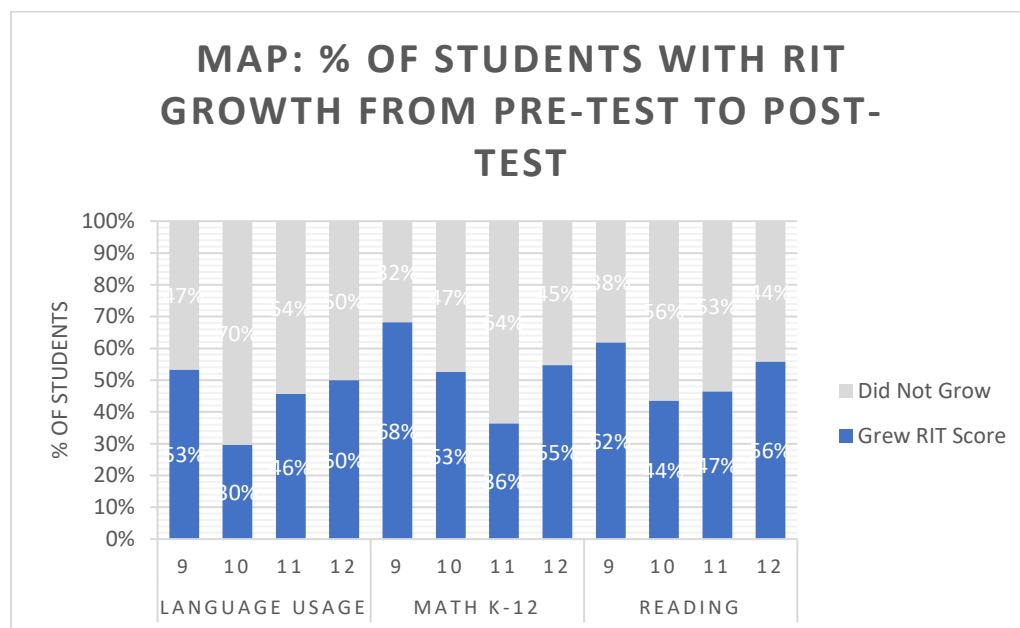


2018-2019

Percentage of Students who Grew their RIT Score from Pre-Test to Post-Test

This graph looks at the percentage of students who achieved RIT score growth from pre-test to post-test.

Count of StudentID	Column Labels		
Row Labels	Grew RIT Score	Did Not Grow	Total
Language Usage	44%	56%	100%
9	53%	47%	100%
10	30%	70%	100%
11	46%	54%	100%
12	50%	50%	100%
Math K-12	51%	49%	100%
9	68%	32%	100%
10	53%	47%	100%
11	36%	64%	100%
12	55%	45%	100%
Reading	51%	49%	100%
9	62%	38%	100%
10	44%	56%	100%
11	47%	53%	100%
12	56%	44%	100%
Total	49%	51%	100%



Participation Rate Methodology

Using CALPADS End of Year (EOY) reports, we determined the number of students enrolled most of the school year (Census Day through mid-May). Using NWEA MAP data extracts, we determined the number of students who pre- and post-tested for each school year (terms vary depending on school year) who were also continuously enrolled according to CALPADS. Using these two data sets, we calculated the test participation rate for each grade level and subgroup in both Reading and Math. We believe this is in the spirit of AB1505's verified data requirements, to provide the test participation rate of students continuously enrolled most of the school year.

Annual Growth Measure

NWEA identifies the Conditional Growth Index (CGI) as an aggregate growth measure that can be used to show growth for a group of students. The Student Growth Summary Report from the MAP system provides the School CGI for each grade level for a specific set of terms, but it does not offer a school-wide average or averages by student subgroup.

Based on guidance from NWEA researchers, we utilized the Student CGI value to calculate the school-wide and subgroup averages for each year. According to NWEA guidance in using MAP Growth Data for AB1505: "For both the student and school CGI values, a CGI range of -0.2 to 0.2 (or greater) could be used as an approximation of one year's growth (or more) in a subject and indicates that the growth observed is generally consistent with the amount of growth observed by students in the same grade and subject with the same starting achievement level receiving a similar amount of instructional exposure." We have attached the guidance document from NWEA to provide more information about this approved calculation method.

Annual Data Tables

The tables below are separated out by school year (one table per school year). Each table has a breakdown by grade, subgroup, and schoolwide for the following measures:

- a. Enrollment Count (from Census Day to mid-May)
- b. Reading and Math: Count of students pre- and post-tested (terms shown in the header for each table – Fall to Spring, Fall to Winter or Winter to Spring) who were also included in the Enrollment Count
- c. Reading and Math: Participation rate (the students pre- and post-tested divided by the enrollment count).
- d. Reading and Math: Conditional Growth Index (CGI) – School CGI from the MAP Student Growth Summary Report shown for grade level averages and the average of Student CGIs taken from the MAP Combined Data Export for schoolwide and student group averages. The CGI scores shown are reflective of growth between the terms defined in the header of each table.

2018-2019: FALL TO SPRING (PRE-AB1505)							
	Enrolled from Census Day to mid-May	Reading pre- & post- tested	Reading Participati on	Reading Condition al Growth Index	Math pre- & post- tested	Math Participati on	Math Condition al Growth Index
09	11	10	91%	1.90	9	82%	1.39
10	24	23	96%	-0.73	22	92%	-0.08
11	36	31	86%	-1.13	32	89%	-1.61
12	37	29	78%	2.02	28	76%	1.50
All Grades	108	93	86%	0.07	91	84%	0.00
SED	102	88	86%	0.11	85	83%	0.02
EL	10	9	90%	*	8	80%	*
SWD	13	13	100%	0.32	13	100%	0.03
Hispanic	84	75	89%	0.22	74	88%	-0.09
White	11	9	82%	-0.93	8	73%	*

2019-2020: FALL TO WINTER (COVID-19 SPRING CLOSURE)							
	Enrolled from Census Day to mid-May	Language Usage pre- & post- tested	Language Usage Participati on	Language Usage Condition al Growth Index	Math pre- & post- tested	Math Participati on	Math Condition al Growth Index
09	12	8	67%	*	5	42%	*
10	31	29	94%	-1.58	28	90%	1.87
11	43	36	84%	-0.35	36	84%	-3.03
12	54	n/a	n/a	n/a	46	85%	1.40
All Grades	140	73	85%	-0.25	115	82%	0.05
SED	125	67	85%	-0.27	101	81%	-0.27
EL	8	1	100%	*	8	100%	*
SWD	14	6	86%	*	10	71%	*
Hispanic	110	58	84%	-0.24	88	80%	0.11
White	13	8	100%	*	13	100%	*

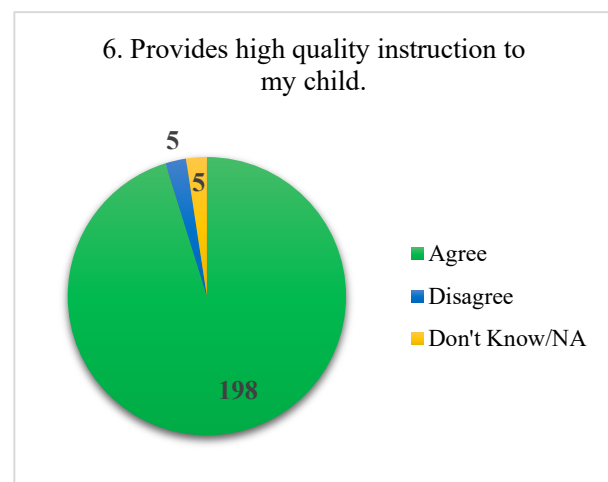
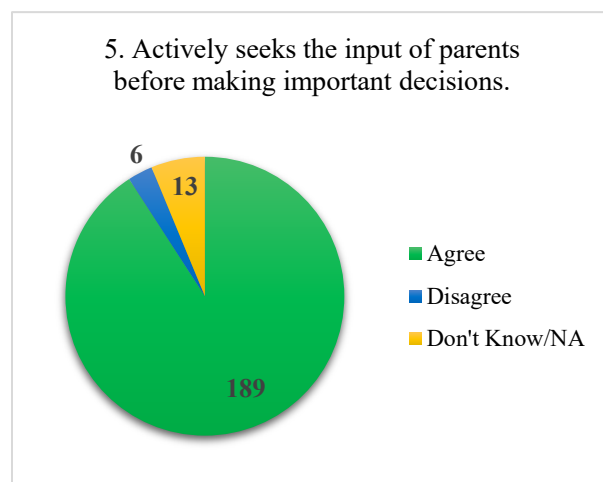
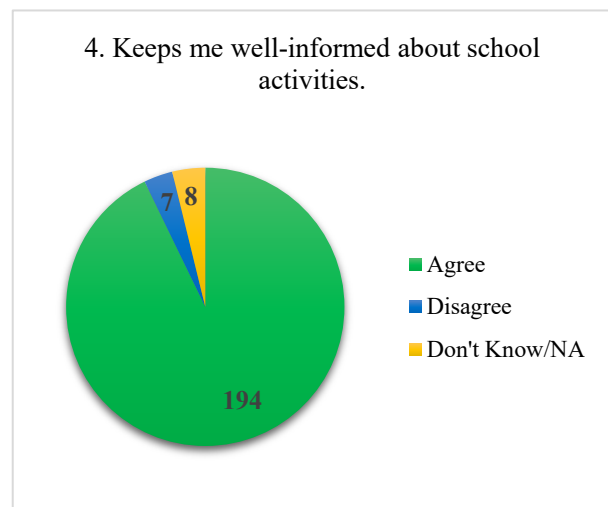
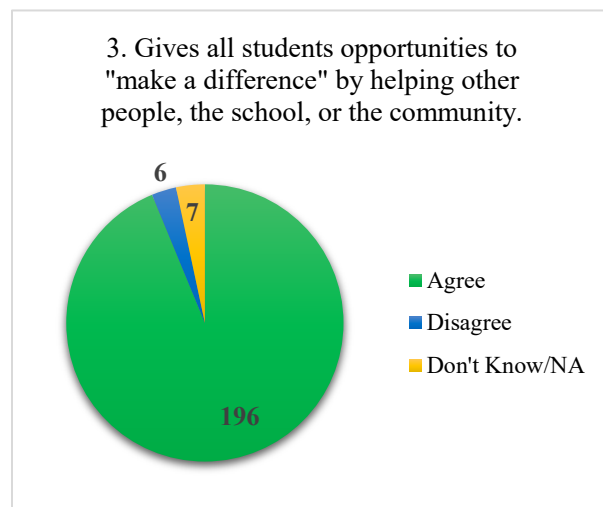
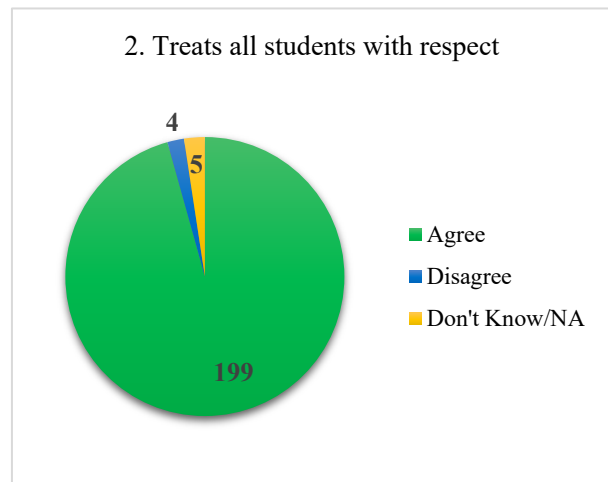
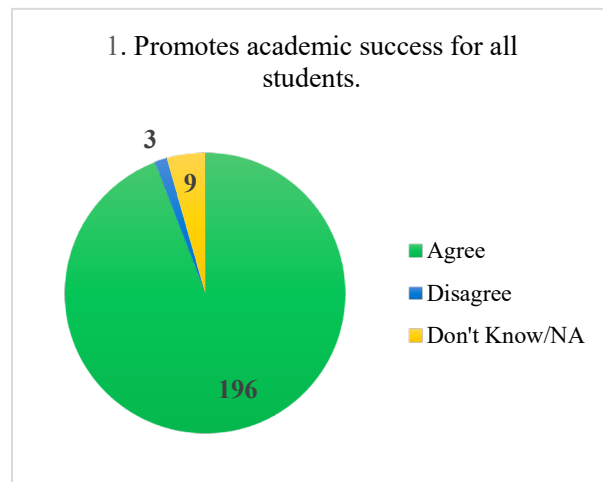
2020-2021: FALL TO SPRING (DISTANCE LEARNING)							
	Enrolled from Census Day to mid-May	Language Usage pre- & post-tested	Language Usage Participation	Language Usage Conditional Growth Index	Math pre- & post-tested	Math Participation	Math Conditional Growth Index
09	1	1	100%	*	1	100%	*
10	23	22	96%	0.09	21	91%	-1.14
11	39	39	100%	-0.89	38	97%	-2.41
12	40	n/a	n/a	n/a	30	75%	-0.24
All Grades	103	62	98%	-0.20	90	87%	-0.35
SED	96	57	98%	-0.24	84	88%	-0.36
EL	8	4	100%	*	8	100%	*
SWD	12	9	100%	*	11	92%	*
Hispanic	83	55	100%	-0.22	75	90%	-0.32
White	8	5	100%	*	7	88%	*

2021-2022: FALL TO WINTER							
	Enrolled from Census Day to mid-May	Language Usage pre- & post-tested	Language Usage Participation	Language Usage Conditional Growth Index	Math pre- & post-tested	Math Participation	Math Conditional Growth Index
09	12	12	100%	-2.30	12	100%	-3.66
10	20	20	100%	-2.64	19	95%	1.88
11	40	39	98%	0.73	39	98%	0.34
12	47	n/a	n/a	n/a	47	100%	0.12
All Grades	119	71	99%	-0.26	117	98%	-0.01
SED	111	68	99%	-0.19	109	98%	0.03
EL	9	5	100%	*	9	100%	*
SWD	12	8	100%	*	12	100%	*
Hispanic	99	59	98%	-0.10	97	98%	0.01
White	5	3	100%	*	5	100%	*

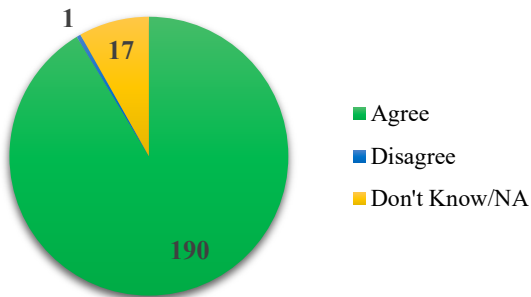
2022-2023: FALL TO SPRING							
	Enrolled from Census Day to mid-May	Language Usage pre- & post-tested	Language Usage Participation	Language Usage Conditional Growth Index	Math pre- & post-tested	Math Participation	Math Conditional Growth Index
09	13	13	100%	-0.69	13	100%	-0.47
10	35	33	94%	-1.51	35	100%	-0.03
11	40	37	93%	-0.96	37	93%	-0.92
12	43	n/a	n/a	n/a	39	91%	0.78
All Grades	131	83	94%	-0.32	124	95%	-0.04
SED	115	72	94%	-0.32	108	94%	0.00
EL	18	12	100%	*	18	100%	*
SWD	20	10	100%	*	19	95%	*
Hispanic	108	69	97%	-0.28	103	95%	-0.01
White	2	1	100%	*	2	100%	*

School of Unlimited Learning 2022-2023 Parent Survey Results (208 Participants)

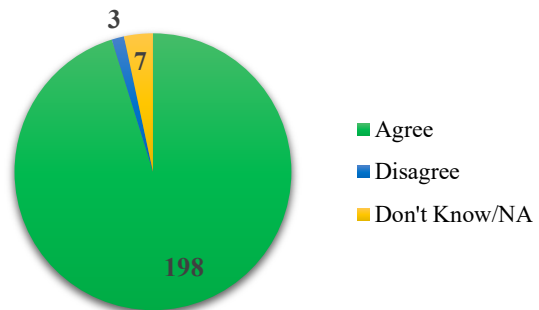
Source: Internal Survey <https://forms.gle/pAfHxDJmEXpN43fy7>



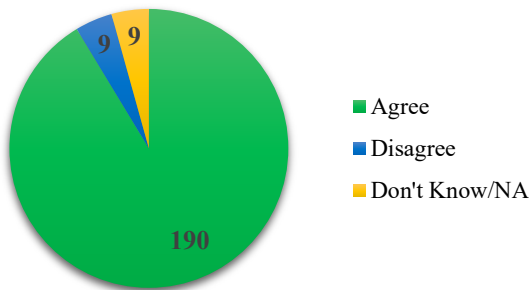
7. My child's teachers are responsive to my child's social and emotional needs.



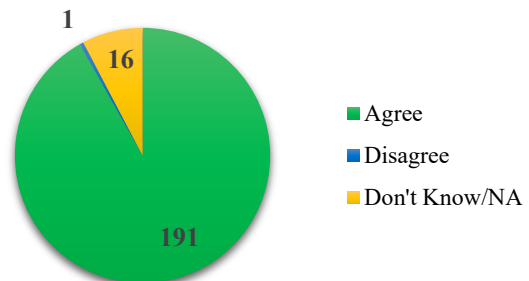
8. My child is receiving adequate instruction from teachers to support assigned work.



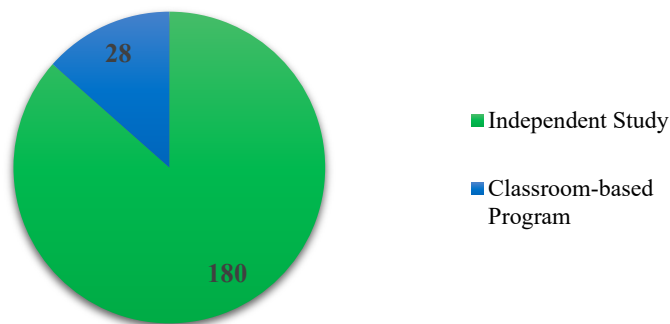
9. My child is motivated to complete the school work she/he is assigned.



10. Our school provides parents with advice and resources to support my child's social and emotional needs.

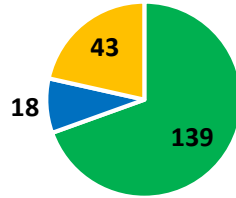


11. SOUL will offer both traditional classroom-based program and an independent study program next year. Which program would you be most likely to choose for your student?



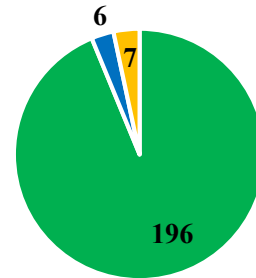
1. I feel like I am a part of this school.

■ Agree
■ Disagree
■ Neither agree or disagree



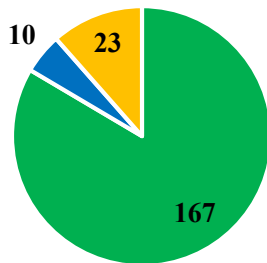
2. The teachers at this school treat students fairly.

■ Agree ■ Disagree ■ Neither agree or disagree



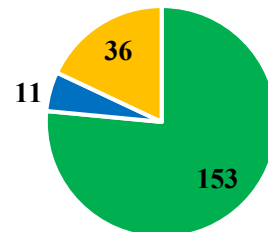
3. I feel safe in my school.

■ Agree ■ Disagree ■ Neither agree or disagree



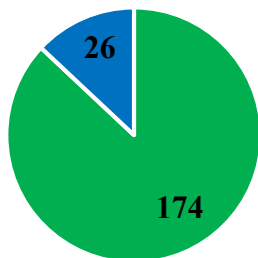
4. School staff take parent concerns seriously.

■ Agree ■ Disagree ■ Neither agree or disagree



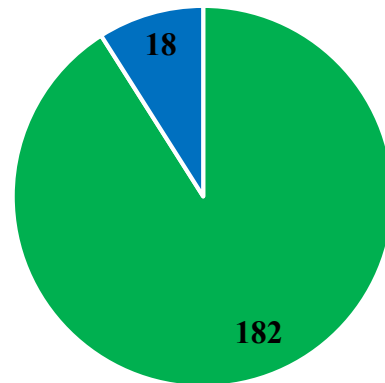
5. SOUL will offer both traditional classroom-based program and an independent study program next year. Which program would you be most likely to choose?

■ Independent Study
■ Classroom-based Program



6. I would describe my satisfaction with my school experiences as:

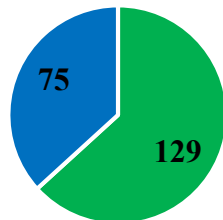
■ Satisfied ■ Dissatisfied



Questions 7-12 begin with:

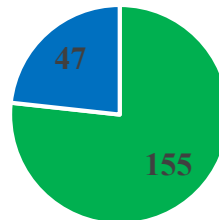
There is a teacher or some other adult from my school who...

7. Really cares about me.



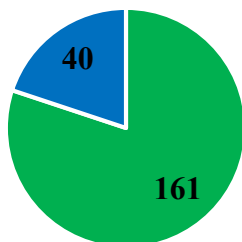
■ True ■ Not true

8. Tells me when I do a good job.



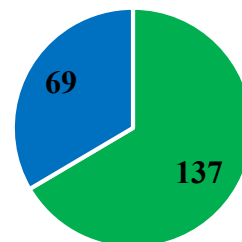
■ True ■ Not true

9. Always wants me to do my best.



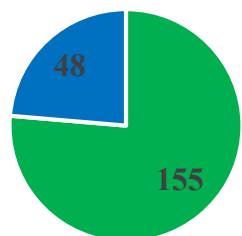
■ True ■ Not true

10. Checks on how I am feeling.



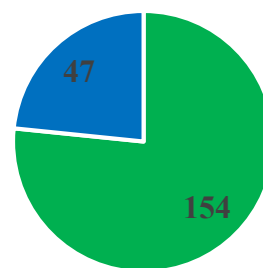
■ True ■ Not true

11. Listens when I have something to say.



■ True ■ Not true

12. Believes that I will be a success.



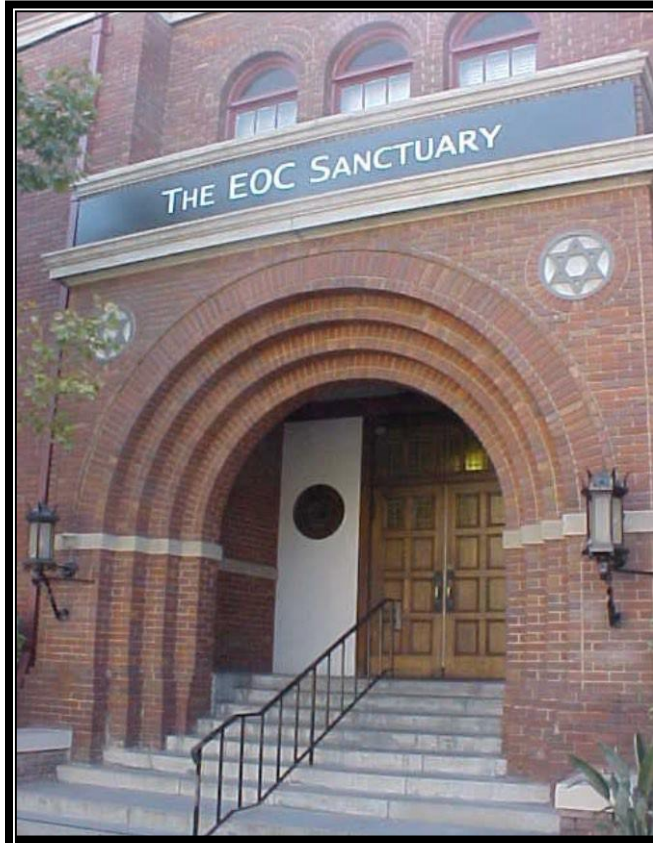
■ True ■ Not true



Fresno **Economic Opportunities Commission**

SCHOOL OF UNLIMITED LEARNING CHARTER HIGH SCHOOL

2336 Calaveras St. Fresno, CA 93721



CHARTER PETITION RENEWAL

July 1, 2018 – June 30, 202563

Material Revision Submitted to:
Fresno Unified School District Board of Education
Date Submitted: INSERT DATE ~~March 28, 2018~~

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I. ASSURANCES AFFIRMATIONS AND DECLARATION

As the authorized lead petitioner, I, ~~Brian Angus~~ Susan Lopez Emilia Reyes hereby certify that the information submitted in this request for a material revision for the charter petition for the ~~renewal of a~~ California public charter school, the Fresno Economic Opportunities Commission ~~the “Fresno Economic Opportunities Commission/~~ School of Unlimited Learning” (hereafter referred to as “SOUL” or “Charter School”), located within the boundaries of the Fresno Unified School District (“FUSD” or the “District”) and authorized by FUSD is true to the best of my knowledge and belief; I also certify that this petition does not constitute the conversion of a private school to the status of a public charter school; and further, I understand the Charter School shall follow any and all federal, state, and local laws and regulations that apply to the Charter School, including but not limited to the requirements of Education Code Section 47605 and the following:

- Be nonsectarian in its programs, admission policies, employment practices, and all other operations. [Ref. Education Code Section EC 47605(ed)(1)]
- Not charge tuition. [Ref. Education Code Section EC 47605(ed)(1)]
- Not discriminate ~~against any pupil~~ on the basis of the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics). [Ref. Education Code Section -EC 47605(ed)(1)]
- Not enroll pupils over 19 years of age unless continuously enrolled in public school and making satisfactory progress toward award of a high school diploma ~~requirements~~. [Ref. Education Code Section 47612(b)]
- If a pupil is expelled or leaves the charter school without graduating or completing the school year for any reason, the charter school shall notify the superintendent of the school district of the pupil's last known address within 30 days, and shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including report cards or a transcript of grades ~~or report card~~, and health information. If the pupil is subsequently expelled or leaves the school district without graduating or completing the school year for any reason, the school district shall provide this information to the Charter School within 30 days if the Charter School demonstrates that the pupil had been enrolled in the Charter School. [Ref. Education Code Section EC 47605(ed)(3)]
- Meet all statewide standards and conduct the pupil assessments required pursuant to Education Code sections 60605, and 60854 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in non-charter public schools. [Ref. Education Code Section EC 47605(de)(1)]
- Consult, on a regular basis, with the charter school's parents, legal guardians, and teachers regarding the school's educational programs. [Ref. Education Code Section EC 47605(de)(2)]

- The Charter School may encourage parental involvement, but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the Charter School. [Ref. Education Code Section 47605(n)]
- The Charter School shall adhere to each of the conditions in Education Code Section 47605(e)(4)(A)-(D), including: (A) not discouraging a student from enrolling or seeking to enroll in the Charter School for any reason; (B) not requesting a student's records or require a parent guardian, or student to submit the student's records before enrollment; (C) not encouraging a student currently attending the Charter School to disenroll or transfer to another school for any reason; and (D) providing a copy of the California Department of Education ("CDE") notice regarding the requirements in Education Code Section 47605(e)(4)(A)-(D) to a parent/guardian or student if the student is 18 years of age or older: (i) when a parent/guardian or student inquires about enrollment, (ii) before conducting an enrollment lottery, or (iii) before disenrollment of a student. [Ref. Education Code Section 47605(e)(4)(A)-(D)]
- Admit all students who wish to attend the Charter School, and who submit a timely application; unless the Charter School receives a greater number of applications than there are spaces for students, in which case each application will be given equal chance of admission through Determine attendance by a public random drawing process. Except as required by Education Code Section 47605(e)(2) and Education Code Section 51747.3, admission to the Charter School shall not be determined according to the place of residence of the student or of that student's parent or legal guardian within the State. ~~if the number of pupils who wish to attend the charter school exceeds the school's capacity.~~ Preference in the public random drawing shall be given in accordance with Education Code Section 47605(e)(2)(B)(i)-(iv). In the event of a drawing, the chartering authority shall make reasonable efforts to accommodate the growth of the Charter School in accordance with Education Code Section 47605(e)(2)(C). ~~shall be extended to pupils who currently attend the charter school and pupils who reside in the District.~~ [Ref. Education Code Section EC 47605(e)(2)(AB)-(C)]
- Fresno County Economic Opportunities Commission, a California nonprofit public benefit corporation, declares that it shall be deemed the exclusive public school employer of the employees of the SOUL for purposes of the Educational Employment Relations Act. [Ref. Education Code Section 47605 (cb)(65)(e)]
- Adhere to all provisions of federal law related to students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990 and the Individuals with Disabilities in Education Improvement Act of 2004.
- Meet all requirements for employment set forth in applicable provisions of law, including, but not limited to credentials, as necessary. [Ref. Title 5 California Code of Regulations Section 11967.5.1(f)(5)(C)]
- Not require any child to attend the Charter School nor any employee to work at the Charter School.
- Ensure that teachers in the Charter School hold thea Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment. The

Charter School may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a school district. Teachers employed by charter schools during the 2019-20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher s certificated assignment. equivalent to that which a teacher in other public schools are required to hold. As allowed by statute, flexibility will be given to non-core, non-college preparatory teachers. [Ref. California Education Code Sections 47605(l)(1) and 47605.4(a)]

- Maintain at all times all necessary and appropriate insurance coverage.
- For each fiscal year, offer at a minimum, the number of minutes of instruction per grade level as required by Education Code Section 47612.5(a)(1)(A)-(D).
- For each fiscal year, meet or exceed the legally required minimum number of school days. [Ref. Title 5 California Code of Regulations Section 11960]
- ~~Follow any and all other federal, state, and local laws and regulations that apply to SOUL including but not limited to the following:~~
- SOUL shall maintain accurate and contemporaneous written records that document all pupil attendance and make these records available for audit and inspection. [Ref. Education Code Section 47612.5(a)(2)]

~~SOUL shall, on a regular basis, consult with its parents and teachers regarding the Charter School's educational programs.~~ [Ref. Education Code Section 47605(d)]

SOUL shall comply with any jurisdictional limitations to locations of its facilities. [Ref. Education Code Section 47605 and 47605.1]

- SOUL shall comply with all laws establishing the minimum and maximum age for public school enrollment. [Ref. Education Code Section 47612(b) and 47610]
- SOUL shall comply with all applicable portions of the Elementary and Secondary Education Act ("ESEA") as reauthorized and amended by the Every Student Succeeds Act ("ESSA")
- ~~SOUL shall comply with all applicable portions of the No Child Left Behind Act.~~
- SOUL shall comply with the Public Records Act.
- SOUL shall comply with the Family Educational Rights and Privacy Act
- SOUL shall comply with the Ralph M. Brown Act.
- SOUL shall comply with Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1 ("Section 1090"). ~~SOUL shall meet or exceed the legally required minimum of school day~~
- SOUL shall comply with the Political Reform Act, Government Code Section 81000, et seq. ("PRA").

Brian Emilia Angus Reyes, Chief Executive Officer
Fresno Economic Opportunities Commission

Date

II. EXECUTIVE SUMMARY

Introduction

Established in 1998, the School of Unlimited Learning (SOUL) was Fresno's first charter high school. Operated by the Fresno Economic Opportunities Commission (Fresno EOC), SOUL has provided a unique educational alternative for nearly 20 years to thousands of high school students, many of whom have a history of low academic achievement and are not currently benefitting from the academic and support services in the traditional classroom setting. Average and high achieving students also choose SOUL when in need of more comprehensive social services and all students attending SOUL receive the extra, individual attention they need to succeed. Since 2007, SOUL has been classified as a school under the Alternative Schools Accountability Model (ASAM), [and now Dashboard Alternative School Status \(DASS\)](#), due to its at-risk-promise student population. SOUL's clearly defined mission is "to provide comprehensive learning experiences in a manner, and in an environment, that enables students to obtain skills, knowledge and motivation to be self-directed, life-long learners as they mature toward self-sufficiency". SOUL addresses the needs of its students through a myriad of individualized academic strategies as well as case management, mental health counseling and coaching, opportunities for increased school connectedness and a focus on improved attendance and behavior.

During the past five years, SOUL's leadership team has provided a well-defined vision and focus for increased student achievement. SOUL's continuous program improvement plan calls for annual staff training to assist teachers in delivering a relevant, Common Core standards-based curriculum using instructional practices that engage all students. Through its professional development efforts, SOUL has refined its commitment to instructional effectiveness by assisting teachers in identifying gaps in pedagogical skills and knowledge to better meet student academic needs and charter goals.

Achievements

SOUL has been fully accredited by the Western Association of School and Colleges since 2008, with SOUL receiving the maximum six-year accreditation term in 2017. For the past 10 years, the WASC process has provided SOUL stakeholders a model for continuous improvement. This process necessitates the involvement and participation of all stakeholder groups; has led to the development of SOUL's Expected Schoolwide Learning Results (ESLRS); identified SOUL's strengths and areas for improvement; and resulted in the development of an action plan which has served to chart the course of SOUL's future. SOUL's WASC Action Plan, in conjunction with its charter goals, laid the foundation for its Local Control Accountability Plan (LCAP), which has been reviewed and updated on an annual basis since the 2014/2015 school year. SOUL's LCAP mirrors the school's WASC Action Plan goals and charter goals.

SOUL has also undergone a transformation with respect to curriculum development. Since 2014, SOUL has been revising its curriculum to better prepare students to meet state performance standards. Since the inception of Smarter Balanced testing, SOUL has outperformed most similar schools in both ELA and math. Likewise, SOUL has met or made progress toward meeting most

of its charter goals. Additionally, in June 2017, SOUL submitted 13 core academic courses for UC “a-g” approval, all of which were accepted. Along with UC “a-g” approval submissions, core teachers have developed reflective lesson plans, which emphasize the core knowledge and skills students are expected to learn, including concepts, theory and texts. As a result of ongoing Common Core training, teachers craft lesson plans that provide adequate detail about the content, while outlining and describing major themes, topics and sub-topics of each unit of study. Each lesson plan includes grade-level common core standards, as well as literacy and ELD standards, providing evidence of the level of rigor and the development of essential critical thinking skills. Literacy is taught throughout the curriculum and ELD standards are embedded schoolwide into each subject area.

Over the past five years, SOUL has made strides with respect to preparing students to become viable participants in a developing workforce. SOUL students ages 16 and over are offered the opportunity to participate in elective courses that allow them to explore their potential careers. In 2014, SOUL developed a partnership with Bitwise Corporation to offer a Coding/Computer Literacy course and formed a partnership with Central California Legal Services which provides students exposure to careers in the legal profession through the Street Law and Mock Trial programs. During the 2015-2016 school year, SOUL expanded its career course offerings to provide more opportunities to actively engage students in career exploration. New courses consisted of website development and video production. SOUL’s Youth Mentoring Program, which is part of the Child Care Career Pathway, provides internship hours in Early Head Start/Head Start centers, and offers a stipend and scholarship opportunities to students completing the program.

During the 2016/2017 school year, SOUL entered into a partnership with IdeaWorks, a neighborhood non-profit trade organization, to provide an innovative, hands-on experience for students in the areas of woodworking, laser-cutting, welding, robotics, ceramics and 3D printing. With a focus on safety, skills, and process, IdeaWorks has set a strong foundation in these trades. It has allowed students to explore and refine their abilities in these potential career areas while earning elective credits toward their high school diploma.

Intervention resources for skills-deficient students, including English learners, have increased over the past five-year period. Students with deficiencies in reading and math are assigned individualized reading and/or math prescriptions to bring them to grade level. For independent study students, a tutorial schedule was devised for all skills-deficient students, with scheduled time to work on their prescriptions before or after their appointments, or at any time before, during, or after school. The inclusion of Achieve 3000’s reading improvement program into all core classes has provided additional support to students through a differentiated instructional approach. Achieve 3000 is aligned with [State of California Common Core State Standards](#), and also incorporates literacy and ELD standards. It has proven to be a valuable supplemental tool in developing literacy skills and increasing lexile levels. All teachers maintain a tutorial one day per week after school hours to assist independent study students performing below grade level in reading and math. ~~Classroom-based students are also encouraged to stay after school during tutorial hours to work on their prescriptions.~~

Areas for Improvement/Growth

A comprehensive review of SOUL's Charter Goals over the past five years reveals progress has been made in some areas with respect to increased student achievement, while some deficiencies exist in other areas. Notwithstanding increases in intervention resources, scores for reading and math reveal a slight downward trend for three consecutive years. A primary cause for the decline in reading and math scores is that most independent study students have not taken advantage of their tutorial options and have not made their math and reading prescriptions a priority. Moreover, monitoring of student progress and growth in reading and math proficiency has been inconsistent.

Overall, comparing SOUL's California Assessment of Student Performance [and Progress](#) (CAASPP) results to those of traditional, comprehensive high schools and similar schools, SOUL has outperformed similar schools in most areas, while lagging behind traditional schools. Increased efforts must be made to ensure that a greater percentage of students meet or exceed the standards in both English language arts (ELA) and math.

SOUL has identified curricular gaps in its math program, specifically in regards to preparing students for the CAASPP Math test. More than half of SOUL's 11th grade students enroll well into their 11th grade year and have not previously passed Algebra I. Few 11th graders have the opportunity to take Algebra II prior to their taking the CAASPP Math test. A large percentage of the questions on the CAASPP Math include Algebra II standards. Curricular changes are needed to address this challenge.

A detailed analysis of CAASPP data, reading and math proficiency, CAHSEE results, graduation rate, suspension, and attendance information are contained in Element B of this charter.

Action Plan

A strategic, prescriptive approach is needed to address deficiencies. To reverse the downward trend in ELA and math proficiency, in Spring 2018, SOUL formalized a process to monitor mandatory prescriptions for all students in both instructional programs. Student progress and growth in reading and math proficiency is consistently monitored by teachers on a weekly basis. Moreover, skills-deficient students ~~in both the classroom-based and independent study programs~~ will be required to take an additional ELA and/or math skills course to address their deficiencies. English learners ~~enrolled in independent study~~ will be assigned an English intervention class every week in addition to their independent study coursework.

In response to SOUL's achievement gap in CAASPP ELA and Math, SOUL will utilize NWEA's Measures of Academic Progress (MAP) Interim Assessments, which are designed to measure a student's academic achievement and to calculate academic growth throughout the year. Beginning in the 2018-2019 school year, the Interim Assessments will be administered in the fall, winter, and spring of each year. Interim Assessments will serve as quarterly benchmarks, since they are

aligned to California Common Core English language arts and math standards. Teachers will use MAP assessment results to guide instruction, which will provide a comprehensive picture of student learning: how much they've grown, what they're ready to learn, and the specific skill gaps they need to master.

To address the curricular gap in math, SOUL will develop an integrated curriculum which incorporates Algebra 1, Algebra II, and Geometry standards. All 11th grade students who have not passed algebra I at the beginning of their 11th grade year will be placed into an Integrated Math course to ensure that they will have been introduced to Algebra II standards prior to taking the CAASPP test. Moreover, this course will provide college-bound students with better preparation for post-secondary education by reinforcing previously learned standards in Algebra I and Geometry. Algebra II will be offered to all students who have completed Algebra I and Geometry by the end of their 10th grade year.

Conclusion

Assessment data has been extremely useful to SOUL staff over the past five years in charting our course through continuous program improvement in alignment with our WASC Action Plan and Local Control Accountability Plan. SOUL's refined charter goals for the next five years will ensure a carefully and well-planned monitoring process so that staff, students, parents, and other stakeholders can be better informed of student progress. A well-crafted and relevant professional development plan will continue to ensure that high quality common core instruction is evident ~~in all classrooms~~ by assisting teachers to seek the most effective ways to meet the academic needs of their students. SOUL's future academic performance will continue to demonstrate the school's commitment to curricular and instructional improvement, as well as the delivery of crucial individualized support services. In the end, increased student achievement is ultimately the gauge by which SOUL's charter goals will be measured.

III. BACKGROUND

The Board of Commissioners of the Fresno Economic Opportunities Commission (Fresno EOC) presents this petition to the Fresno Unified School District Board of Trustees for a renewal of a charter school located within the jurisdiction of the Fresno Unified School District. As permitted by state law, this petition has been developed to provide additional choice for parents and their students who exhibit distinct academic and social needs. Most students who benefit from enrollment in the School of Unlimited Learning Charter High School have demonstrated a greater need for academic support and social services than what is available in the traditional educational system.

Fresno EOC is widely recognized as one of the largest nonprofit community action agencies in the United States. Founded in 1965, following the passage of the Economic Opportunity Act of 1964, the agency has spent the past five decades investing in people to help them become self-sufficient. The broad scope of Fresno EOC's services provides links in the human service system in Fresno County and throughout the Central San Joaquin Valley. Fresno EOC is vital to the community's well-being. Guided by its motto, "Helping People, Changing Lives", Fresno EOC acts as a vehicle to ensure equal access to education, employment, housing, and healthy living conditions as mandated by the Federal Economic Opportunities Act. The agency currently serves more than 150,000 individuals each year through over 30 programs addressing the needs of the poor through education, employment, training, transportation, nutrition, energy conservation, and emergency energy assistance. For over 52 years, Fresno EOC has built a strong foundation of services that offer support to people in all phases of life.

In response to the growing number of high school dropouts among children of adults receiving Fresno EOC services, the Board of Commissioners submitted a petition to operate a charter school for high-risk, disadvantaged youth in the Fresno metropolitan area. In July 1998, the School of Unlimited Learning Charter High School became Fresno Unified School District's first charter high school. With the granting of this charter, SOUL became an alternative education option to help educate an increasing population of at-risk students.

The School of Unlimited Learning Charter High School, operated by Fresno EOC, provides educational services, as well as social support services, to high school youth and their families to strengthen the possibilities of their becoming productive, self-reliant members of the community. By submitting this charter renewal to provide alternative educational services to students in grades 9 through 12, Fresno EOC believes that SOUL will continue its success in providing comprehensive educational services to youth in the Fresno Metropolitan area who may otherwise be at risk of dropping out of high school.

IV: REQUIRED CHARTER ELEMENTS

Element A: Description of School's Education Program

~~"A description of the~~ The educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an 'educated person' in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners." California Education Code §47605(~~cb~~)(5)(A)(i).

"The annual goals for the charter school for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals." Educational Code Section 47605(c)(5)(A)(ii).

~~"If the proposed charter school will serve high school pupils, a description of the manner in which the charter school will inform parents about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. Courses offered by the charter school that are accredited by the Western Association of Schools and Colleges may be considered transferable and courses approved by the University of California or the California State University as creditable under the "A" to "G" admissions criteria may be considered to meet college entrance requirements." Education Code Section 47605(~~cb~~)(5)(A)(iii).~~

Vision and Purpose

The vision for Fresno Economic Opportunities Commission's School of Unlimited Learning is for the student to be a self-directed learner, a collaborative worker, and a complex thinker who is equipped with the skills and self-confidence to be productive and self-sufficient as an adult through work and community service.

Mission Statement

The mission of the School of Unlimited Learning Charter High School is to provide comprehensive learning experiences in a manner and in an environment that enables students to obtain skills, knowledge, and motivation to be self-directed, life-long learners as they mature toward self-sufficiency.

The Students We Serve

The School of Unlimited Learning (SOUL) presently serves, educates and works with students residing primarily within the Fresno metropolitan area. The students, ages 14 to 22, and grades 9 through 12, have not yet received a high school diploma and many are at high risk of dropping out of school. The majority of SOUL students reside in economically depressed areas within the Fresno metropolitan area. Most targeted youth have a history of low academic achievement due primarily to poor attendance in their previous schools. Many of these young men and women have arrived at SOUL bearing a history of low academic achievement. A review of their scholastic

career typically reveals a failure to benefit from available support services in the traditional school system, and a possible need for more comprehensive social services.

The School of Unlimited Learning has been an asset to the Fresno community in serving at-risk promise youth for nearly 20 years. SOUL's target population can be largely defined as students who are habitually truant, severely credit deficient, pregnant or parenting, or part of the juvenile justice system and at risk of dropping out of school. Since 2007, SOUL has been classified as a school under the Alternative Schools Accountability Model (ASAM), and the successor classification, Dashboard Alternative School Status (DASS) due to its student population.

As depicted below, upon enrolling more than 90% of SOUL students have been identified as chronic truants. Nearly 50% of SOUL's enrollment consists of 12th grade students, the majority of whom have been previously enrolled in three or more high schools. Over 75% of all SOUL students are 11th and 12th graders who are significantly behind in credits due to past patterns of truancy. SOUL students often lack access to basic health services and are lacking life skills that prepare them to be self-reliant in today's economy. Most SOUL students live in low-income neighborhoods with high incidents of gang and criminal activity. Many students come from homes plagued by substance abuse, domestic violence, and neglect.

SOUL Student Profile

- ◆ 90% have been identified as chronic truants.
- ◆ 90% come from homes where the parent is unemployed or underemployed.
- ◆ 94% are socioeconomically disadvantaged, qualifying for free and reduced meals.
- ◆ 73% are 11th and 12th graders and severely credit deficient.
- ◆ 40% have parents that never completed high school.
- ◆ 11% are teen parents.
- ◆ 5% are in the juvenile justice system or wards of the court.
- ◆ 7% are or have been homeless.



Grades Served	9th-12th
1st Year of Operation	July 1, 1998
Oct. 2017 CBEDS Enrollment	155
Free and Reduced Lunch	94%
Special Education	13%
English language learners	13%
American Indian	1%
African American	8%
Asian	3%
Hispanic	79%
Caucasian	9%

Table I: School and Student Demographics Taken from CBEDS October 2017

SOUL plans to educate each student in accordance with the educational plan set forth in this charter petition. Each barrier or factor discussed above is addressed through instruction, individualized counseling, case management, and dropout prevention services within the school's program design.

What Does it Mean to Be an Educated Person in the 21st Century?

Twenty-first-century learning means that students master content while producing, synthesizing, and evaluating information from a wide variety of subjects and sources with respect for diverse cultures. Twenty first century students will need to continue to master the three R's required of 20th century learners, but will have also mastered the four Cs: critical thinking, creativity, communication, and collaboration. The 21st century learner demonstrates digital literacy as well as civic responsibility, and becomes a self-directed lifelong learner by preparing for post-secondary education that will lead to a sustainable career. Twenty-first-century learning connects relevant and engaging content to skill. Success in the 21st century requires knowing *how* to learn. Students today will likely have several careers in their lifetime. They must develop strong critical thinking and interpersonal communication skills in order to be successful in an increasingly fluid, interconnected, and complex world. Today's students have access to powerful learning tools that allow them to locate, acquire, and even create knowledge much more quickly than ever before. But simply being able to search for information on the internet is no substitute for true understanding. Today's students need to develop skills to find knowledge. Educated individuals in the 21st century are able to overcome life's challenges by applying learned knowledge to become productive, financially independent, and self-reliant members of the community.

The School of Unlimited Learning is committed to providing its students a quality educational experience with the academic resources and non-academic supportive services they will need to overcome barriers such as poverty, skill deficiency, teen pregnancy, truancy, depression, and homelessness, to name a few. To address these barriers, SOUL provides the necessary interventions, resources, and individualized learning environments which focus on improving literacy skills and college and career readiness. All SOUL students are provided a standards-driven curriculum, imparted through a direct interactive instructional model. SOUL students have access to technology through internet-accessible laptops [that they may use at home or at SOUL's facilities located in all classrooms](#). SOUL students are provided career exploration opportunities to prepare them to become self-reliant lifelong learners and competitive in today's career market. As

reflected in its Expected Schoolwide Learning Results (ESLRS), which were developed in response to 21st century learner needs, Fresno EOC's School of Unlimited Learning believes that students who are taught to become critical thinkers, information processors and effective communicators will possess the vital knowledge and skills to meet and overcome life's challenge in the 21st century, assuring them a brighter future in preparing them for career opportunities and economic independence.

Expected Schoolwide Learning Results

In order to obtain skills, knowledge, and motivation to be self-directed, life-long learners as they mature toward self-sufficiency in the 21st century, the students at the School of Unlimited Learning will be:

Effective Communicators

- Demonstrate ability to read, write, speak and listen for a variety of reasons
- Possess social and cultural literacy skills to function productively in today's society

Academic Achievers

- Demonstrate mastery of basic skills, especially in Math and English Language Arts.
- Demonstrate proficiency in all core academic subjects.

Critical Thinkers and Problem Solvers

- Analyze, synthesize, and apply information.
- Apply problem-solving and decision-making skills to real life situations.

Information Processors

- Demonstrate the ability to effectively access resources and information in the community.
- Locate, access, organize, evaluate, and supply information for a complex and technological world.

Self-Directed Lifelong Learners

- Set, pursue, and accomplish realistic and challenging goals.
- Develop a post-secondary (college and/or career preparation) plan that clearly reflects the options and choices available to them upon graduation.

Responsible and Productive Citizens

- Demonstrate healthy, responsible behavior and work collaboratively and respectfully in an ethnically, culturally, linguistically and socio-economically diverse community.
- Recognize and respect the rules and processes that govern society.

Instructional Methodology- How Learning Best Occurs

Education is best delivered through verifiable research-based instructional practices. Student assessment data is used to modify curriculum and promote individualized or differentiated instruction. Measurable student outcomes are monitored, evaluated, and sustained for long term growth. SOUL has adopted a comprehensive approach to addressing each student's academic, social, and personal needs. Innovative instructional approaches, coupled with case management, counseling, and truancy prevention services, will promote greater academic and personal success among students. SOUL firmly believes that learning best occurs when students feel connected to the school and learning environment, and when parents are given the adequate resources to assist their child in becoming successful learners.

SOUL offers ~~a classroom-based program and~~ an Independent Study program. ~~Both components of SOUL's educational program are~~ is located at the Fresno EOC Sanctuary Youth Center at 2336 Calaveras Street. SOUL's instructional staff consists of 11 fully credentialed, full-time teachers, who serve an average of ~~75 classroom-based students, and~~ 130-220 Independent Study students per semester. ~~Both the Classroom-based and Independent Study programs offer~~ the same rigorous academic, standards-based curriculum, as well as supportive services, such as case management, mental health counseling, and access to extra-curricular activities. A majority of the students who enroll ~~in either program~~ are credit deficient and at risk of dropping out of school.

Classroom-Based Program

~~The School of Unlimited Learning provides 180 days of instruction for classroom-based and Independent Study students. For the classroom-based students, classes are held Monday through Friday according to the School's board approved calendar, bell schedule and instructional minutes. SOUL's calendar is the same as that of Fresno Unified School District. All classes in the classroom-based program are 60 minutes in length, with the exception of SOUL's afternoon block schedule classes, which are 105 minutes two days per week. Mondays are minimum days, with teacher planning time and scheduled staff development in the afternoon. SOUL's daily schedule exceeds the number of minutes required by Education Code Section 47612.5(a)(1).~~

Independent Study Program

SOUL has operated its unique program as a charter school since 1998, before such time that California law recognized a distinction between classroom-based and nonclassroom-based charter schools. After the passage of SB 740 in 2001, and since May 2003, SOUL has been continuously awarded a nonclassroom-based funding determination by the California State Board of Education, and has at all times since operated as a nonclassroom-based charter school consistent with Education Code Section 47612.5(e)(2). As a nonclassroom-based charter school, SOUL affirms that it shall continue to comply with all laws and regulations applicable to nonclassroom-based charter school programs and the offering of independent study, including Education Code Sections 47612.5, 47634.2, 51745 et seq., 5 California Code of Regulations ("CCR") Sections 11960, 11963-11963.7, 5 CCR 11701-11704.

SOUL operates a program that is The Independent Study-based, as a program is an optional educational alternative to traditional public school options. Students cannot be required to enroll at SOUL participate. Students who choose to attend the Charter School do so because they seek an the Independent Study component program. SOUL students typically face scheduling conflicts within a traditional school day. They voluntarily enroll in the Charter School for this alternative instructional program.

Independent Study sStudents are scheduled for a minimum of one hour of face-to-face, in person (synchronous) instruction per week, but are able to access and benefit from the additional services available at any time. In addition to providing a comprehensive high school curriculum, SOUL also offers its Independent Study students a wide array of support services, including personal and mental health counseling, case management, access to health services, family services, and childcare services.

Prior to entering SOUL's sIndependent sStudy program, students must often articulate have a compelling reason or need for the Independent Study an alternative to a traditional school program, such as a physical disability, pregnancy, lack of childcare, family hardship, or an identified personal, social, or mental health issue which prevents them from attending school on a daily basis. Like the classroom-based program, SOUL's iIndependent sStudy program offers a standards-based curriculum. In recent years, a concerted effort has been made to bring about greater alignment in regards to the Independent Study curriculum and grade level standards. The recent curricular alignment between the classroom-based and Independent Study programs has increased the rigor of Independent Study.

The Charter School will utilize its facilities to host student meetings, activities, and school programming, but each student's course of study shall be on an independent study basis and consistent with its educational model, the Charter School will not maintain a regularly scheduled classroom-based school day option for students.

Course Curriculum

During the 2017/2018 school year, SOUL submitted and received UC “a-g” approval through the University of California’s High School Articulation Department of its core science, math, English, and social science courses. Curriculum for SOUL’s core subjects is aligned with Common Core State Standards. Grade level standards are taught in all core academic classes each day. As a charter school, we are free to explore alternative types of curriculum, which may or may not be state mandated. Most SOUL students are skills deficient, and reading below grade level. Consequently, supplemental materials are utilized to facilitate student understanding of the subject matter, without compromising the grade level standard. In other words, a 10th grade student reading at the sixth grade level can still learn 10th grade standards in English Language Arts, but the readability of the supplemental materials is more comprehensible to the student. In recent years, most traditional textbook-based curriculum has given way to a standards-driven curriculum. All core curriculum materials are selected in accordance with the content standards. SOUL’s goal is to provide high quality, engaging materials that assist students in becoming proficient in all core content areas. All core academic teachers are tasked with reviewing materials in light of student assessment data to determine if there is a need to modify curriculum to increase performance outcomes.

California’s 1997 academic content standards and the more recent Common Core State Standards (CCSS) for English Language Arts and Mathematics are equal in their level of rigor and call for high expectations of all students. However, the Common Core Standards provide for additional skills and knowledge necessary in a global economy and technology-rich workplace. Under the CCSS, students will learn to work collaboratively and use digital media to express and present evidence-based fiction and non-fiction literary analysis. The CCSS also focus on extending mathematical thinking to real-world challenges so that students develop a depth of understanding and an ability to solve everyday problems through the power of mathematics.

The School of Unlimited Learning is fully committed to the complete and successful implementation of the Common Core State Standards (CCSS). Since the 2014/2015 school year, SOUL has received Common Core Implementation training from the K-12 Center for College & Career Readiness. For the past four years, all staff development efforts have focused on best practices in preparing teachers for the implementation of the Common Core Standards and integration of English Language Arts literacy into all areas of the curriculum.

SOUL’s reflective lesson planning incorporates core, literacy, and ELD standards in each unit of study, incorporating differentiated instructional approaches for English Learners. SOUL efforts to align its curriculum and instruction delivery ensure that all SOUL students have access to the Common Core State Standards, literacy standards, and ELD standards. SOUL continues to receive professional development ELD training through Fresno Unified’s English Learner Services’ Office. SOUL, which is fully accredited by the Western Association of Schools and Colleges (WASC), is actively committed to a continuous academic improvement. WASC provides a structure for continuous school improvement as an ongoing process. This has helped SOUL to analyze, evaluate, and improve its instructional program. This increases academic rigor through the

development and implementation of best practices in curriculum and instruction. SOUL's commitment to program improvement will continue to play a pivotal role in its implementation of the Common Core.

Scope and Sequence

~~Students are assigned individualized, prescriptive language arts and math curriculum through Edgenuity's MyPath. Each year pacing calendars are updated to ensure alignment of curriculum and instruction with grade level standards. Pacing calendars address specific standards on a weekly basis. The pacing calendar describes when each standard should be taught and shows the specific locations of each standard in the adopted texts.~~ Supplementary materials continue to be created to address any tested standards not adequately covered in the adopted textbooks. All tested standards are strategically designed to be taught and reviewed before test dates.

Each course offered at SOUL has a developed scope and sequence, as well as a developed course description. Teachers ~~use pacing charts to~~ teach curriculum in accordance with state standards. Students are expected to demonstrate performance objectives in accordance with the state standards. Students are administered formative exams, benchmark tests, and summative exams to determine if standards are being mastered and which skills need to be re-taught. Students who fall below mastery level are given additional instruction and assessment in specific areas. Tutoring is available ~~after school~~ four days per week to all students who fall behind and require additional assistance.

Direct Instruction and Common Core

~~In all classrooms, teachers~~ Teachers utilize differentiated and direct instruction to deliver common core lessons that are aligned to state standards. ~~Achieve 3000 is incorporated into every subject to increase reading skills. All teachers write lesson objectives and standards on the board.~~ Daily essential questions to lessons, checking for understanding, pair sharing, collaborative work, and the use of technology can be observed ~~in all classrooms~~ with all students. Reflective unit plans, along with regular assessment of student learning and deliberate assessment planning based on the standards within the unit plans, are used school wide. ELD strategies such as contextualization and front-loading are used across curriculum.

Strategies are also utilized to engage students by using academic vocabulary, collaborating orally and encouraging interaction with others. Guest speakers and field trips are incorporated into the school day to provide hands-on experiences for specific careers. Staff meets to discuss student issues and to share best practices on a regular basis.

Teachers submit lesson plans that are based upon core, literacy, and ELD standards, as well as the school's ESLRs, direct instruction, checking for understanding, increasing DOK levels by clustering standards with literacy or math practice standards. Reflective lesson plans incorporate summative and formative assessments. They utilize direct instruction, scaffolding and constant CFU (checking for understanding). There are daily assignments with student input on lesson delivery, one-on-one teacher/student conversations, group and individual content projects and

essays with rubrics. Teachers have daily tutorial hours ~~after-school~~ for students in need of support and can assign specific students to attend these sessions as needed. Strategies are employed where students offer and justify opinions with evidence and oral presentations. This keeps students engaged while they collaborate and interact with each other.

Deconstruction of standards facilitates the identification of specific cognitive tasks and content details, as well as facilitating the creation of lessons with specific purpose. Deconstructing the standards helps the teacher process the learning outcomes and organize lessons strategically.

With such a small student population teachers can easily recognize the needs of each student. ~~In small classes,~~ teachers are able to work one-on-one with students ~~in-class~~ individually or in small groups to ensure that the students are learning. Checking for understanding, random questioning, writing responses, guided questions and peer teaching are strategies used throughout lessons. Peer observations are done on a regular basis and unit plans are modified as needed. Students are placed in intervention classes to increase reading and math skills, when needed, for core classes.

Use of Student Data to Support Teachers

Teachers routinely use data to guide instructional decisions and meet students' learning needs. Data is used as an ongoing tool to formulate strategies to raise student achievement and implement instructional changes. Assessments and assignments are provided to students that reflect what students understand and how they are mastering standards.

Data from classwork and homework assignments, Achieve 3000 (lexile levels), Accuaccess Prescription progress, and daily interaction with students are all utilized to adjust teaching for the most effective delivery of curriculum. Information from the student's Pathways dashboard (i.e., registration/enrollment, student's accommodations based on IEP's and EL status) along with teacher/staff observation and parent feedback are also used to adjust teaching.

Accuaccess scores and Lexile levels are used to determine student groups for many classes, and progress is monitored to move students between groups as needed.

Periodic assessments throughout the unit lessons and formative assessments are given on a regular basis. If students do not perform well on an assessment teachers will go back and reteach before moving on to the next standard.

School Pathways is used to monitor 504 Plans, IEP accommodations/modifications and to identify EL students so that assignments can be modified to fit student needs. As special groups show improvement or fall behind, teaching is adjusted for particular students as deemed necessary.

Literacy is continually monitored and recognized through Accuaccess tests, prescriptions, and lexile advancements. Lesson plans and curriculum are aligned with state standards for teaching common core. Discipline data and IEP data also helps with strategies to better teach students. Data provides teachers with information as to how students are progressing. As data is updated, teachers are able to modify teaching strategies, objectives and expectations. The data received

from PLATO and other assessments helps to drive the instruction. Data is often used to assign study groups and to help address the needs of SPED and EL students.

- Attendance data is used to assist teachers in identifying students who are in need of make-up work & after-school tutorial time.
- Behavioral and discipline data, as well as IEP's and 504 Plans are used to help develop learning plans and strategies for supporting students special needs and teacher effectiveness.
- Reading, writing, and Lexile data are used to determine complexity of documents/texts, strategic mixed-ability groupings of students, and scaffolding strategies to support struggling students/readers/writers.

During weekly meetings, the results from the data noted above are discussed by teachers. Teachers review whether the current implementation of teaching strategies and curriculum are achieving the expected results. Improvements and suggestions are brainstormed by all teachers.

Lesson plans are developed to ensure that each assignment is aligned with the state's common core standards in literacy, and ELA. This ensures that all students including SPED and EL students are meeting, the standards for their individual grade levels. ESLR's are used as a tool to motivate the students and to utilize positive reinforcement when they achieve their individual goals.

Lexile Levels as an Intervention Tool

Intervention is utilized based on scores from the Plato Accucess test and from Lexile Levels assessed through Achieve 3000. This data helps teachers determine if students need intervention, tutoring and/or modifications of work assignments and teaching strategies. Through the Achieve pretest, the lexile level is used to set goals for students to become career and college ready. Assessments for reading and math given at the beginning of the year to our students through Plato are used to assign prescriptions to intervene and raise students to the appropriate level of reading and math. Students work on these prescriptions throughout the semester.

Lexile levels measure the difficulty of texts and the reading capacity of students. By knowing Lexile levels the teacher can determine what strategies to incorporate into their lesson plans to help students build on vocabulary and comprehension along with writing skills. Lexile levels are also important when the teacher is providing background knowledge and the purpose for reading the text. The Lexile score can be used as a screening tool for student performance to gain an understanding of the gaps in student skill levels. Lexile levels can be used to place students in strategic groups for group work and projects. If students score low on their initial test they can be assigned to an Intervention class if further assessment indicates that the student is truly lacking grade level skills.

Targeted Strategies Across All Subject Areas

The following strategies have been implemented across the curriculum in both core and elective subjects to increase reading levels and promote greater student engagement:

- Reading for meaning (active reading): identifying major ideas, purpose, themes; raising questions; making inferences, reading to improve Lexile levels;
- Relevant education: drawing connections with what students are learning in school to their own experiences, other texts, and the world. Academic vocabulary instruction with tier 2 & 3 terms includes opportunity for meaning inquiry (synonyms, antonyms, examples, characteristics, etc.).
- Critical thinking: encouraging students to think of alternative answers, alternative strategies of problem-solving, and interrogating the validity of statements. Essential questions are asked in lessons to increase rigor in the [classroom learning environment](#), make the content applicable to students' lives and increase academic achievement.
- Collaborative learning: project-based learning where students collaborate to complete a task.

Intervention Courses, Electives and Services to English Learners

SOUL's intervention program is regularly reviewed and evaluated to increase its effectiveness. CAASPP, [CELDT/ELPAC](#), Accucess and other diagnostic tests are used to properly place students into intervention classes where they are provided remediation in addition to their grade-level classes. Intervention classes are used to bolster sub grade level skills in math and reading.

Additionally, all students must continue to receive at least one grade-level English Language Arts and math class if they are to do well on the CAASPP Smarter Balanced tests. The focus of regular classes is on grade-level content. Training is provided to teachers in differentiated instructional practices where the sub-skills are adjusted, but grade-level content is not. For example, utilizing low level reading materials while performing a grade-level analysis allows students to learn at grade-level pace.

SOUL continues to develop new elective courses for students [as part of its in both the](#) Independent Study [and classroom-based](#) program. Elective courses, like all core courses, are taught by appropriately credentialed teachers, and include subjects like Personal and Family Living, Introduction to Careers, Street Law, Ideaworks, Child Development, Computer Literacy and Life Skills. In addition, Edmentum/Plato is the online software used at SOUL for credit recovery, and is offered [to both classroom-based students and Independent Study students](#) as elective credits. [Afternoon block classes are an additional option for Independent Study students who wish to enroll in a classroom-based elective course two days per week.](#) During the 2017/2018 school year, an increased number of Independent Study students participated in elective courses.

Other Methods of Instructional Delivery

Edmentum/Plato

Plato is an online, web-based program used by SOUL students for credit recovery courses. The online UC approved curriculum has enabled dozens of SOUL students to achieve success, learn at an individualized level and benefit from an instructional experience and pace that meets their unique needs. Students work on Plato at school and at home. Plato provides 21st century learning opportunities for students whose academic needs stretch beyond the constraints of the traditional classroom. Since so many of SOUL students are credit deficient, Plato provides an opportunity for students to earn additional credits by retaking a class they have previously failed while employing the accelerated use of technology. Plato's self-paced interactive curriculum, along with its internet-based features, has proven successful for non-traditional learners. The web-based curriculum is accessible from any internet connection. Plato includes courses in the core subjects of History and Geography, Math, Language Arts, and Science, as well as a variety of electives.

Technology in ~~the Classroom~~ education

As part of its program improvement plan, The School of Unlimited Learning has made a focused effort to integrate technology into the curriculum, especially in the core academic areas of reading and math. By using technology as a tool, SOUL students communicate effectively and globally, work collaboratively, use critical and analytical thinking skills, and use information wisely and responsibly. Staying informed and active in the technology community ensures that SOUL students and teachers receive the most up to date information and that technology is consistently used to enhance SOUL's curriculum. SOUL's ultimate goal is to prepare its students for a prosperous and productive future in a rapidly changing world.

Technology is available to students and teachers ~~in classrooms and in independent study.~~ ~~All classrooms are equipped with computers and internet access.~~ Computers with internet access are ~~also~~ available to ~~Independent Study~~ students who need to complete projects, conduct research, develop English and Math skills or complete online credit recovery lessons. Computers are also located in the school's Career Center for students to complete online career assessments. SOUL's online credit recovery program, as well as its web-based English and math intervention curriculum, is available to eligible students during and after traditional school hours. Computers are available to teachers and all students, including but not limited to special education and English Language Learners during school and after school hours. Each teacher is issued a laptop and a tablet.

During the school day, students use technology in a variety of ways. Each classroom at SOUL is equipped with mounted data projector. In SOUL's Reading Intervention classes, students reading below grade level utilize the Achieve 3000 web-based literacy program to develop English skills. Over the past five years, all teachers have increased the use of various content area specific software programs to enhance instruction. Students use the internet to gather research for Science and English projects. In Social Science classes, students have access to computers to better understand maps, geographic features and concepts. Students use the computers to enhance

reports and essays by using keyboarding and other technology skills. Recent technological advances include the installation of an interactive smart board in the Math room.

All teachers integrate technology into instruction. Most teachers currently use the Internet to research curriculum topics and enhance lesson plans. They use email to communicate with colleagues and students. Teachers submit lessons plans to school administration via email, Dropbox, and Google Docs. Electronic bulletins are used throughout the school to share information. Some teachers use presentation software to introduce units of study in content area subjects, and have their students submit assignments electronically through Schoology, email, or Google docs.

Serving Students with Disabilities

SOUL is compliant with all applicable state and federal laws in providing services to students with disabilities, including Section 504 of the Rehabilitation Act, the Americans with Disabilities Act (ADA), the Individuals with Disabilities in Education Improvement Act (IDEIA) and all other civil rights enforced by the U.S. Department of Education Office of Civil Rights. SOUL functions as a public school of the District for purposes of providing special education and related services pursuant to Education Code Section 47641(b). It complies with all state and federal laws related to the provision of special education instruction and services and all SELPA policies and procedures, and utilize appropriate SELPA forms. SOUL is solely responsible for its compliance with Section 504 and the ADA. The SOUL campus is accessible for all students with disabilities. Students with disabilities who enroll in SOUL shall be provided services as outlined in the MOU with the Fresno Unified School District.

Student Study Team

SOUL uses a systematic, problem-solving approach to assist students who are not making adequate progress. The school implements appropriate interventions for a student at the earliest indication of student need in order to ensure the student's success. If students are experiencing academic, social/emotional, behavioral, attendance, health and/or other needs, a Student Study Team (SST) meeting is held. The purpose of the Student Study Team is to: (1) inform parents of their child's progress and offer suggestions which may reinforce academic success; (2) lend ideas which support and/or modify the student's regular education program, and (3) decide whether or not assessment is needed to determine eligibility for Section 504 or for Special Education. Anyone who has a concern for a student can refer that student for an SST meeting. This meeting, which includes the identified student, his parent/guardian, teachers, a case manager, an administrator and any other pertinent personnel, acts as a forum for discussing identified concerns, as well as to consider all information relevant to the unique needs of the child. The team shares information about the student's strengths, their observations, and interventions/strategies that have been used in the past. The SST is a regular education function that addresses concerns and needs of

identified students, and generates strategies for enhancing the success of the child. The SST tailors appropriate interventions to meet the unique needs of each student.

Section 504 of the Rehabilitation Act

SOUL recognizes its legal responsibility to ensure that no one with a disability is excluded from participating in, or denied benefits of, any program of the Charter School. Disability in this context refers to a physical or mental impairment which substantially limits one or more major life activities, including, but not limited to, learning. Any student who has such an identified disability is eligible for accommodations by the Charter School under Section 504 of the Rehabilitation Act and the Americans with Disabilities Act.

The SOUL 504 team is a multidisciplinary team comprised of school staff members who are knowledgeable about the student being evaluated and who have an understanding of the evaluation data and placement options. The parent/guardian, as well as any other individuals pertinent to the well-being of the child, is encouraged to be involved in this process.

The 504 team reviews the student's existing academic, social and behavioral records, and makes a determination as to whether a 504 Plan is appropriate. If the student has already been evaluated under the IDEIA but found ineligible for special education instruction or related services, those evaluations may be used to help determine eligibility under Section 504. The 504 team assesses the nature of the student's disability and the impact upon the student's education.

If the 504 team deems the student qualified, the team is responsible for determining what, if any, accommodations or services are needed to ensure that the student receives a Free and Appropriate Public Education (FAPE). A 504 plan describes the Section 504 disability and provides a combination of services and/or accommodations necessary to enable the student to receive the maximum benefit from their education at SOUL.

All 504 team participants, parents/guardians, teachers and any other participants in the student's education are given a copy of the student's 504 Plan. A copy of the 504 Plan is maintained in the student's file. Each student's 504 Plan is reviewed at least once per year to determine the appropriateness of the Plan, needed modifications to the Plan, and continued eligibility.

If during the evaluation or review, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEIA, a referral for assessment under the IDEIA is made by the 504 team.

Services for Students under the "IDEIA"

The Charter School provides special education instruction and related services in accordance with the IDEIA, Education Code requirements, and applicable policies and practices of the District/SELPA. The Charter School remains a public school of the District for purposes of Special Education pursuant to Education Code Section 47641(b). No student shall be denied enrollment based on disability. SOUL shall comply with dispute resolution process of the FUSD SELPA.

As a public charter school of the District, solely for purposes of providing special education and related services under the IDEIA pursuant to Education Code Section 47641(b), in accordance with Education Code Section 47646 and 20 U.S.C. 1413, SOUL ensures the appropriate referral, assessment, IEP development, modification and implementation procedures.

The School of Unlimited Learning acknowledges the importance of cooperating with Fresno Unified School District to ensure FAPE is offered to Charter School students. The Charter School agrees to promptly respond to all District inquiries, to comply with reasonable District directives, and to allow the District access to Charter School students, staff, facilities, equipment and records.

Pursuant to the guidelines stipulated in the Memorandum of Understanding between the School of Unlimited Learning and the Fresno Unified School District:

- Special Education Staff assigned by the Fresno Unified School District performs evaluations for students in need of tri-annual and initial assessments.
- SOUL's Guidance Counselor, or other appointed staff, serves as a coordinator between FUSD and SOUL personnel. The assigned coordinator stays abreast of federal and state laws and stays in close contact with the FUSD staff to ensure compliance.
- All IEPs are completed on Fresno Unified forms.
- The FUSD special education staff and assigned coordinator from SOUL ensure that SOUL teachers and administrators are given adequate notification of IEP meetings.
- The assigned FUSD special education staff informs the SOUL's Principal, parents, and students of any IEP meetings. The assigned coordinator assists as necessary to insure that parents are present at IEP meetings.
- The assigned coordinator or registrar informs the assigned FUSD special education staff or district immediately if a special education student is dropped from SOUL or if a new special education student is requesting enrollment into the SOUL program.
- The assigned FUSD special education staff informs the SOUL Principal and teachers of any special accommodations for special education students.
- All SOUL staff understands and complies with accommodations and/or modifications recorded within a student's IEP or 504 plan. Teachers ensure substitute teachers are provided with information necessary to ensure full implementation of IEPs or 504 plans.
- All special education records are kept in a secure and locked cabinet. All appropriate FUSD staff have access to these records as needed.

- SOUL understands its responsibility to provide special education instruction and related services to students enrolled in the school regardless of a student's district of residence.
- The FUSD school psychologist provides crisis counseling as needed.

Serving English Learners

Overview

The School of Unlimited Learning meets all applicable legal requirements for the English Learner (EL) as they pertain to annual notification to parents, student identification, placement, program options, EL and core content instruction, teacher qualifications and training, re-classification to fluent-English proficient status, monitoring and evaluating program effectiveness, and standardized testing requirements. The Charter School implements policies to assure proper placement, evaluation, and communication regarding ELs and the rights of students and parents. EL students are identified through the Home Language Survey and, beginning in 2017, the English Language Proficiency Assessments for California (ELPAC). The Guidance Counselor Coordinator serves as SOUL's EL Coordinator. EL students are redesignated upon meeting guidelines for redesignation.

Home Language Survey

The Charter School administers the home language survey upon student enrollment into the Charter School. Upon enrollment, every student, regardless of racial or ethnic background, is asked to complete a Home Language Survey (HLS) and a student enrollment form, which includes additional questions regarding home language. Upon request, home language surveys are translated and provided in the students' home language. The home language survey asks four questions that assist the school in determining the appropriate follow-up for the student. The Home Language Survey serves to identify students who come from homes where a language other than English is spoken, and does so in a manner that is equitable, comprehensive, and not based upon assumptions or stereotypes. The Home Language Survey is not used to assess or determine language proficiency. It is used as an indicator for additional assessment and data gathering.

CELDT/ELPAC Testing

If a student's Home Language Survey indicates that a language other than English is spoken in the home, student academic records are reviewed to see if the student has been designated an English Learner at their previous school or district. Student records are also reviewed to obtain the student's proficiency level. If student records are not available, the student is referred for assessment by Fresno Unified School District to determine initial proficiency levels and determine if language support services are necessary, and if so, the degree of services offered.

Students that have an established English Learner proficiency level and updated assessments are tested each year using ~~the California English Language Development Test (CELDT).~~ the English

Language Proficiency Assessments for California (ELPAC)) ~~will be the successor to the California English Language Development Test (CELDT)~~, which ~~has is been~~ the required state test for English language proficiency that must be given to students whose primary language is other than English. Students also complete the Accucess Language Arts assessment each year. The results of these assessments, along with teacher recommendations, are used to determine whether the student meets the criterion for redesignation as fluent English proficient.

English Language Proficiency Assessment

All students who indicate that their home language is other than English will be tested with the ELPAC. The ELPAC has four proficiency levels (Level 4: well developed; Level 3: moderately developed; Level 2: somewhat developed; and Level 1: minimally developed) and is aligned with the 2012 California ELD Standards.

The ELPAC consists of two separate assessments:

- Initial Assessment ("IA")

The ELPAC IA is used to identify students as either an English Learner, or as fluent in English. The IA is administered only once during a student's time in the California public school system based upon the results of the home language survey. The locally scored IA will be the official score. The IA is given to students in grades K–12 whose primary language is not English to determine their English proficiency status.

- Summative Assessment ("SA")

ELs will take the SA every year until they are reclassified as fluent English proficient. The ELPAC SA is only given to students who have previously been identified as an EL based upon the IA results, in order to measure how well they are progressing with English development in each of the four domains. The results are used as one of four criteria to determine if the student is ready to be reclassified as fluent English proficient, to help inform proper educational placement, and to report progress for accountability.

Both the ELPAC SA and IA are assessments administered in seven grade spans—K, 1, 2, 3–5, 6–8, 9–10, and 11–12. In grades 9–12, the test is administered in groups, exclusive of speaking, which is administered individually. The ELPAC IA and SA will be administered via a computer-based platform. The ELPAC IA and SA will be administered via a computer-based platform.

Testing times will vary depending upon the grade level, domain, and individual student. Both the ELPAC IA and SA are given in two separate testing windows through the school year.

The IA testing window will be year-round (July 1–June 30). Any student whose primary language is other than English as determined by the home language survey and who has not previously been identified as an English Learner by a California public school or for whom there is no record of results from an administration of an English language proficiency test, shall be assessed for English language proficiency within 30 calendar days after the date of first enrollment in a California public school, or within 60 calendar days before the date of first enrollment, but not before July 1 of that school year.

The SA testing window will be a four-month window after January 1 (February 1–May 31). The English language proficiency of all currently enrolled English Learners shall be assessed by

administering the test during the annual assessment window.

The Charter School will notify all parents of its responsibility for ELPAC testing and of ELPAC results within thirty days of receiving results from publisher. The ELPAC shall be used to fulfill the requirements under the Every Student Succeeds Act for annual English proficiency testing.

SOUL continuously makes a concentrated effort to maximize parent involvement and participation for parents of EL students. A Bilingual Advisory Committee was established in 2017 to further engage parents of English learners. The Bilingual Advisory group has active input along with all parents, staff, students, and the community stakeholders into SOUL's annual LCAP plan.

Educational Theory and Approach

The program for English Learners is designed to help students acquire fluency in English, to provide students with equal access to the academic core curriculum, and to help students maintain a positive self-concept. Students are taught the California Common Core State Standards, which incorporate California Literacy Standards and English Language Development Standards into daily instruction. The choice and combination of strategies used takes into consideration individual student needs, Federal, State, and local guidelines, academic best practices, and parent input. SOUL provides an option of classroom-based instruction or designated and integrated ELD to its EL students through its Independent Study programming to for English learners. In addition to academic vocabulary reinforcement, teachers use adapted language to assist students in understanding content. Teachers also utilize gestures and visual aids to reinforce vocabulary acquisition.

Differentiated Instruction for English Learners

SOUL's classroom-based program uses an immersion model for English Learners. All EL students have access to the core curriculum and grade level standards, and are also enrolled in an English intervention class. Teachers identify all EL students in their classes and include in their lesson plans differentiated instruction to accommodate their needs. The differentiated instruction is designed at a readability level that accommodates the EL student and, at the same time, ensures that the core content is at grade level. Small class sizes allow for individualized learning and additional student support.

The SOUL model of differentiated instruction requires teachers to be flexible in their approach to teaching, curriculum adjustment, and presentation of information to English Learners. Classroom teaching is a blend of whole-class, group and individual instruction. Achieve 3000 is incorporated into every subject to increase reading skills. ELD strategies such as contextualization and front-loading are used across curriculum. All teachers write lesson objectives and standards on the board. Daily essential questions to lessons, checking for understanding, pair sharing, collaborative work, and the use of technology can be observed in all classroomsthe educational setting.

In classes with English Learners, teachers speak slowly, use frequent modeling, avoid using slang and idiomatic speech, use multi-sensory instruction and hands-on activities. They relate information, as much as is possible to their students' prior knowledge and they scaffold instruction. To enhance academic achievement, teachers create a language-rich [classroom—learning environment](#) with several different media (books, magazines, newspapers, audio-tapes, video tapes, and computer software), enabling students to access different learning styles and also help build connections. SOUL's annual professional development plan includes multiple English learner strategies and plans for successful implementation and incorporation into daily instruction.

Assessments are regularly utilized in all subject areas to monitor the English Learners' attainment of literacy skills. Assessments may be formal (curriculum-embedded) or informal, including interviews, surveys, and performance assessments. Pre and on-going assessments provide teachers a tool for monitoring the progress of all students, including English Learners. English Language Development materials are analyzed on a regular basis to ensure that each level of instruction represents a more advanced level of English acquisition.

In 2017, SOUL adopted Listenwise, a listening comprehension platform available to advance literacy and learning. [Used in several SOUL classrooms](#), Listenwise improves English Learners' language skills with engaging listening practice, and assists students in building various depths of knowledge, from recall to strategic and extended thinking.

Since 2016, SOUL has utilized Flocabulary in core and elective classes. Flocabulary uses a hip-hop video platform to help students master standards-based academic skills and content while building core literacy skills through engagement, mastery and student creativity. Regular [classroom](#) evaluations of teachers are conducted to ensure that teachers are incorporating differentiated instructional strategies into their lessons to help English Learners succeed.

Professional Development

Teachers receive ongoing training in English Language Development differentiated instruction by educational consultants. English Language Development training incorporates strategies to ensure that all students understand grade level content. The focus of the training is the use of differentiated instruction for the varying ELD Levels.

Transition/Exiting

The goal of the English Language Development program at SOUL is English Language proficiency and demonstration of mastery in grade-level standards. Through ongoing evaluation of formative assessments such as [GELDT/ELPAC](#), Accucess and Achieve 3000, students are evaluated for transition through the stages of English proficiency towards redesignation. SOUL has adopted a standard for student transition and redesignation that includes academic performance, including [GELDT/ELPAC](#), Accucess, Achieve 3000 and teacher evaluation.

A student is eligible for ~~redesignation~~ reclassification based on the following criteria:

- Students must perform at a proficiency level of 800 or above on the on the Accucess Reading Test
- Students must ~~perform at a level of Early Advanced or Advanced on the overall score and at least Intermediate on the Listening, Speaking, Reading, and Writing subtests of the CELDT examination.~~ have an overall performance level of 4
- Completion of the Teacher Observation of Oral Language Form indicating that the student is a Fluent English speaker.
- Parents are notified, and provided that they agree with the recommendation, their signature is obtained.
- Original redesignation forms are placed in student files and copies are sent to parents.

Each English Learner who meets the established multiple ~~redesignation~~ reclassification criteria is classified as Redesignated Fluent English Proficient (RFEP). SOUL continues to track the academic progress of students who are redesignated from the language support program to ensure that they continue to perform satisfactorily in their grade-level coursework without the additional support of the English Learner program.

Monitoring

Each year, administrative staff observes and evaluates teachers throughout the year to ensure appropriate placement and teaching practices targeted to EL students and other special populations. Administrative and counseling staff audit student files annually to ensure EL program documentation compliance. The audit ensures that student files include: assessment results, home language surveys, redesignation forms, and any other information pertinent to adequate program placement and compliance.

Plan for Low and High Achieving Students

Students that are achieving below proficiency level are identified through Accucess, CAASPP, Achieve 3000 and teacher grade analysis. Students who are performing below grade level are assigned mandatory supplemental academic enrichment classes in order to raise academic achievement. Students also receive individualized tutoring as needed. Students who are identified as high achieving based on Accucess and Achieve 3000 assessments have the option to participate in special curricular offerings and concurrent enrollment in Fresno City College classes. Students who are considered high performing meet with the counseling staff to determine what plan is appropriate to promote continued academic challenges and educational success. Parents are informed of optional programs and classes to further enhance their child's education and abilities.

9th – 12th Courses and Content

Students in grades 9 through 12 are classified by graduation requirement year. Students who are below the expected number of credits per grade level are given opportunities for credit recovery, such as Plato, night school, and accelerated elective options. (Students enrolled in elective courses can opt to complete a project ~~outside of the classroom~~ to earn additional project-based credits for that particular course.) Technology is integrated in all core subject areas such as Language Arts, Mathematics, Social Studies, and Science.

Graduation Requirements

SOUL requires a total of 230 credits for a high school diploma. SOUL meets or exceeds the minimum course requirements of the California Education Code, section 51225.3.a.1, which states “At least the following numbers of courses in the subjects specified, each course having a duration of one year, unless otherwise specified:

- (A) 30 credits in English.
- (B) 20 credits in Mathematics, including Algebra.
- (C) 20 credits in science, including biological and physical sciences.
- (D) 30 credits in social studies, including United States history and geography; world history, culture, and geography; a one-semester course in American government and civics, and a one-semester course in economics.
- (E) 10 credits in visual or performing arts or foreign language.
- (F) 20 credits in physical education, unless the pupil has been exempted pursuant to the provisions of this code.

Along with the minimum state requirements, the School of Unlimited Learning requires its students to complete an additional 10 credits of English, an additional 10 credits of Mathematics, including Algebra and Geometry, an additional 10 credits of science, 5 credits of health or sociology, and 65 elective credits.

Our aim for every student at SOUL is grade level mastery of each subject area skill as determined by California the Common Core Standards. The core academic courses of the School of Unlimited Learning are aligned with the California Common Core State Standards.

SOUL teachers are credentialed by the State of California and regularly access professional development training in the pursuit of excellence in ~~the classroom~~teaching. They record weekly, monthly, quarterly, and semester student progress results, and share them with the principal, counseling staff, and parents upon request.

All standardized tests and assessments are administered (and if appropriate, evaluated and analyzed) and disseminated by the counseling staff under the direction of the school principal. A veteran counseling and teaching staff assure the reliability and validity of standardized assessments by utilizing strict security measures as outlined by the particular assessment tool. The state-mandated assessments are administered to students in the Spring.

Accuccess and Achieve 3000 document student improvement in reading and math. The pre-test is given within two weeks of a student enrolling into SOUL. The post-test is administered after ninety consecutive days of a student's enrollment each school year. The data is analyzed and results are reported to all stakeholders on an annual basis. The principal and the counseling staff analyze and evaluate data and, with teacher and student input, make recommendations for improvement in curriculum and instruction.

Categorical Funding

Consolidated Application

SOUL is a direct-funded charter school and eligible to receive Title 1A and Title IIA categorical funding. To receive eligible categorical funding, SOUL is required each year to submit the Consolidated Application, which is used by the California Department of Education to distribute categorical funds from various state and federal programs (e.g., Title I, Part A, Title IIA) to county offices, school districts, and charter schools throughout California. Every local educational agency (LEA) certifies the Spring Release data collections to document participation in categorical programs and provides assurances that the LEA will comply with the legal requirements of each program. The Winter Release of the application, certified in January of the following year, contains the LEA's entitlements for each funded program. Out of each state and federal program entitlement, LEAs allocate funds for indirect costs of administration for programs operated by the LEA.

Single School District Plan

In 2010, SOUL's LEA plan and Single Plan for Student Achievement plan were consolidated into the Single School District (SSD) Plan, which incorporates the required elements of both the LEA Plan and the SPSA. Each year, the plan is reviewed and, when necessary, revised to reflect changes in school goals. In the context of this Plan, improvements in instruction, professional development, course offerings, and counseling and prevention programs are means of achieving specific academic goals. All categorical funds are used according to federal guidelines to better serve under-achieving students of the School of Unlimited Learning. SOUL's charter is designated as a schoolwide program for Title I.

Local Control Accountability Plan and WASC Action Plan

In the development of SOUL's Local Control Accountability Plan, stakeholders from all groups reviewed SOUL's current charter goals, the updated WASC action plan, Title I Schoolwide goals, and goals of SOUL's LEA Plan. The group reviewed the performance of SOUL students over the past five years to validate the need for continued improvement in the identified areas. In addition to input from community members, SOUL surveyed staff, parents, and students to determine the greatest needs and concerns from each group. SOUL's leadership team reviewed input from all stakeholders. They synthesized input to include four major goal areas in the LCAP over the next three years. The goals are fully aligned with the school's WASC Action Plan, which had a significant impact in the development of the school's LCAP:

1. Improve student academic performance by increasing reading and math levels of all SOUL Students.
2. Increase SOUL's graduation rate by offering expanded options for earning credits through flexible scheduling and more individualized instruction.
3. Create greater student connectedness to school and motivation for academic success. Increase efforts to identify, monitor, and support students who are at high risk of dropping out of school ~~in both the classroom-based and independent study programs~~, and make referrals to appropriate intervention resources.
4. Increase teacher/parent communication, ~~as an especially in SOUL's~~ independent study program, where parents are less likely to become involved in school activities designed for parents.

Each of SOUL's Local Control Accountability Plan goals clearly delineates specific Expected Annual Measurable Outcomes, which mirror the benchmarks for each of the goals set forth in the WASC Action Plan.

Performance data is compiled at the end of each year to measure the degree to which SOUL has met its WASC Action Plan and LCAP goals. Each year, these data are reported in both the LCAP Annual Update and WASC Action Plan Update.

Performance data are analyzed by staff and reviewed by all school stakeholders to identify program strengths and critical needs on an annual basis. Follow-up discussions with stakeholders provide additional resources to assist SOUL in better responding to critical learner needs. Revisions to the LCAP, based on the findings of the data, are made in conjunction with annual revisions and adjustments to the WASC Action Plan.

School Connectedness & Special Support Services

Most students who enroll at SOUL arrive having lacked a connection to the traditional high school setting, leaving them unmotivated and at risk of dropping out. To address this, SOUL has developed a more diagnostic approach to providing intervention and support services to its students. In addition to the aforementioned intervention strategies dealing with a student's academic needs, special resources are made available to address the student's personal, social, mental, emotional, and in some cases, physical needs.

Many of SOUL's students have needs that reach far beyond a diagnosed deficiency in reading or Math. Their educational shortcomings can usually be traced to a history of chronic truancy, often caused by insurmountable problems in the child's life that he/she has not been able to cope with or successfully overcome.

Learning best occurs when a student's social and emotional dynamics are conducive to learning. Unfortunately, many students come to school unprepared to learn because of undue emotional stress in their lives. With the help of the case managers at SOUL, along with a plethora of

prescriptive supportive services, these students receive the attention and assistance they need to overcome the barriers that have led to truancy, lack of motivation and a history of academic failure.

Each student receives case management services primarily aimed at cultivating a stronger personal and social acumen. Their ability to deal with what is often a dysfunctional family and/or environment is vital to their personal and academic development. Case managers work closely with the students to access resources provided by Fresno EOC and other community agencies to address personal, family, social, and emotional needs. In addition to case management services, SOUL offers mental health counseling through Kaiser Permanente's Psychology department, as well as additional supportive services through Fresno State's Social Work program. Case managers are available to every student at SOUL, ~~whether enrolled in the classroom-based program or in Independent Study~~. A family meeting is held upon enrollment, followed by several individual meetings so that a trusting relationship can be developed. Due to the typical SOUL student's history of poor academic performance, truancy, and misbehavior, meeting with a SOUL case manager is often times the first positive interaction parents have had with the educational system in years. Case managers are well versed in student needs assessment, and appropriate service and resource referrals. Many of these referral based services are offered on, or near SOUL's campus such as:

- Mental health counseling provided by Kaiser Permanente's Psychology Department Interns.
- Personal coaching and support provided by Fresno State's Social Work Department interns.
- Temporary shelter and counseling for runaway and out-of-control youth by the EOC Sanctuary Youth Shelter.
- Child care and child development classes offered by Fresno EOC's Head Start/Early Head Start Program at SOUL's Early Head Start child development center
- Health service needs provided by Fresno EOC's health clinic.
- Housing and homelessness issues addressed by Fresno EOC's Housing Project services

For the past two years, SOUL has contracted with a local counseling center to provide Success for Life Training to SOUL students. Students and staff meet weekly in a group setting and in addition, individual coaching sessions are available upon request. Through the year, students and staff learn the power of creating a life vision and explore the dynamics of the steps necessary to translate vision into action. Students and staff build partnerships with one another while students practice goal-setting by imagining their lives in the short term and begin to build the foundation for their future. The support of partnerships is invaluable for success. Learning how to work as a team helps with developing social skills and communication skills, and has proven to have a positive impact ~~in~~ the classroom on students.

SOUL's greatest resource is not merely an academic program that mirrors other traditional and non-traditional high schools. Rather, SOUL provides a wide variety of avenues designed to connect

students to school, whether it be through delivery of special resources and support services, or through participation in extracurricular activities. SOUL's alternative educational setting is a vehicle of opportunity, providing it's students a way out of their previous cycle of truancy and disconnectedness. SOUL delivers relevant prescriptive resources and services designed to increase school attendance, connectedness, and involvement in extracurricular activities. Services include home visits to identified truants, individualized counseling, parent engagement opportunities, and scheduled participation in extracurricular and community activities.

SOUL provides a host of opportunities designed to connect students with the concept of school, such as youth mentoring, career development, leadership, community service clubs, musical education, and sports. All of these programs work hand in hand to create a level of mutual respect among students and staff, and an atmosphere of engagement between the students and their education. The personal relationships established in a small school setting allow for a greater understanding, acceptance, and tolerance among staff and students.

SOUL has developed an annual parent involvement plan, which encourages parents to attend scheduled meetings and activities throughout the year. Over the past five years, increased parent participation and communication with staff has correlated with increased student attendance, academic improvement, and positive student behavior and motivation. Truancy prevention efforts, pro-parent activities, academic support, and case management referrals have proven to lead to increased student attendance, an increased number of credits earned per semester, and more positive student behavior. SOUL's Truancy Prevention Officer works closely with the Principal to organize parent meetings focused on best practice parental strategies that can be used in addressing a child's lack of engagement in regards to education. Graduation roadmaps are developed for all 12th grade students. Graduation roadmaps include parent meetings, case management support, academic, personal, and career counseling, and a variety of community service referrals to insure a prescriptive course of action for each individual is prepared.

SOUL prides itself on developing school connectedness in each of its students. Every student is encouraged to participate in extracurricular activities. Participating in activities outside of [the classroom/coursework](#) helps students develop a relationship with the staff and educational environment, while encouraging a passion for regular attendance and pride in their accomplishments. For those students wishing to participate in sports, SOUL's athletic program welcomes them, regardless of athletic ability or previous grade point average. Some students choose to pursue the arts through learning a musical instrument, singing, painting or ceramics. Students are given several opportunities throughout the year to showcase their talents. Some students opt to participate in Leadership, where they find meaningful volunteer opportunities in their own communities, with the support and teamwork of their SOUL peers and staff. Many students enroll in the career block classes where they can explore their strengths and interests, find meaning in their education, and grow through networks in the community. Some glean value from the Youth Mentoring program where they are trained, then placed in a child care setting where they mentor pre-school age children, while receiving valuable guidance or "mentorship" themselves.

As with traditional, comprehensive high schools, SOUL offers ample opportunities for student involvement. However, SOUL distinguishes itself through its individual encouragement and relationship building with its students who have at other times felt isolated in the mainstream, and lacked the confidence to become invested in school. SOUL has earned a reputation for its ability to promote connectedness and growth in student confidence which make new students want to enroll and enrolled students want to continue coming every day. It is the support and assistance from SOUL staff that helps students ease their life stressors and free their minds to learn. It is then, and only then, that the ~~classroom~~ teachers can successfully impart the knowledge and expertise of their course content with a level of enthusiasm and high expectations for student success. At that point we recognize an increase in motivation to do well, the confidence to put forth greater effort to build skills which have been lacking, and the spirit to strive for academic, personal, and social growth.

Extracurricular Programs and Services

As previously mentioned, SOUL offers tutoring and remediation as part of its ~~after-school~~ program. Extracurricular activities are open ~~to Independent Study students as well as classroom based~~ all students.

Charter School Athletic League

The Charter School Activities League (CSAL) was started by SOUL in 2000 as another means to improve students' commitment to education and provide positive alternatives in the form of recreational/social activities. This athletic component provides healthy, structured competition between charter schools, continuation schools, and other organized youth groups in the greater Fresno area. This program provides opportunities for students to compete with their peers and enjoy a fun, wholesome recreational environment. SOUL students are encouraged to participate in the CSAL sports program, which includes football, basketball, volleyball and mushball. At present, twelve alternative schools participate in the CSAL. Parents are invited to show their support for the school and their children by attending CSAL sporting events and are encouraged to take an active role in promoting school spirit and friendly competition. Each year, over 40 SOUL students participate in sports.

Attendance Expectations and Requirements

Students cannot ~~learn if they are not actively participating in their own learning~~ ~~earn if they do not attend school~~. Every SOUL student is expected to ~~arrive~~ ~~engage in their~~ ~~classes every day with the required frequency articulated in their independent study master agreement~~ ~~or to~~ ~~and attend~~ their scheduled ~~class~~ appointments, on time and prepared to work with appropriate materials and assignments. Parent conferences are scheduled for students demonstrating excessive truancy. Attendance contracts are used to help students set goals and plan strategies for improvement.

~~The maximum number of full-day absences that a student can have in the classroom-based program in any given semester is 17. When a student reaches nine absences of any kind he/she is placed on an attendance contract. If the student breaks the attendance contract due to an invalid absence, the student may be considered for withdrawal from school. A student's absence may be termed valid due to personal illness, attendance at the funeral service of member of the immediate family, or a partial or full-day absence due to a medical, dental, or court appointment. Valid absences are counted in the total number of allowable absences each semester.~~

~~There are times throughout the year that a student may be absent for more than one day due to illness, travel, or unexpected family crises. SOUL's classroom-based program offers a short-term Independent Study option for students needing to be absent for a period of two to ten school days. Pursuant to California Education Code 51747, during their short-term absence from school, students are assigned independent work, which is supervised by their parent/guardian and due upon their designated date of return. Students who successfully complete the assigned work are not marked absent during the days missed. Students who fail to submit completed assignments by the due date designated on their Independent Study contract are marked absent for all days missed. Students interested in the Short-Term Independent Study program must meet with their case manager and complete all necessary paperwork before they can participate.~~

~~A call must be placed to appropriate staff within 24 hours of a student's absence to validate that day's absence. In the case of consecutive absences due to illness, a phone call must be placed every day that the student is out in order to validate those day's absences.~~

~~By the end of the first hour of school each day, a case manager collects attendance from all (classroom-based) first period classes to identify students who are absent. Phone calls are placed to a parent/guardian for each student to inform them of the student's absence and/or to determine the reason for the absence. As part of SOUL's outreach efforts, any absent student on the "Top 25" list (students who have established themselves as one of SOUL's 25 worst truancy cases) or student in violation of an attendance contract is the recipient of a home visit. Home visits are conducted to make direct contact with the parent/guardian and determine the basis for the student's absence. If deemed necessary, the student and family are referred to additional social services.~~

When [an Independent Study](#) student is absent, the teacher calls the student's home during the time of the missed appointment to determine the reason for the absence. Teachers give the students an opportunity to reschedule their appointment within the same week. It is considered an absence if an Independent Study student does not meet with his/her teacher at least once per week. Every effort is made to encourage students to keep their appointment and complete all assigned work. However, after three absences, or after three appointments with no work completed, an Independent Study student may be removed from the program due to lack of progress and/or poor attendance.

Notice to Parents of Student Transferability

Upon enrolling their child in SOUL and each year thereafter, parents are notified during a scheduled orientation of SOUL's transferability and its status for "a-g" course list approval. While SOUL is in

the process of obtaining the “a-g” course list approval, students have the option of taking UC-approved core courses through the concurrent enrollment program at a local adult school or on PLATO. Information in regards to course transferability to other schools and eligibility of courses in meeting college entrance requirements is also made available to parents at scheduled parent meetings and upon parental request. Each school year, the parent/guardian of each student receives a parent/student handbook that outlines each of the courses offered at SOUL.

If a student expresses a desire to return to their district high school, every effort is made to collaborate with that school’s counseling staff to ensure a seamless transition back into the student’s home school. The same effort applies should a student desire to transfer to another charter school or adult school. Upon request, a withdrawal form and transcript are provided to the parent and an official copy is sent to their school of choice. Every effort is made on behalf of SOUL staff to counsel the student and family regarding the transfer to ensure it is an appropriate choice for their academic success.

SOUL encourages all students to pursue the academic setting most beneficial to them. Historically, a very small percentage of SOUL students return to a traditional high school. Twelfth grade students who transfer out of SOUL typically attend another charter school, an adult school program, or simply drop out of school. In some cases, 9th, 10th and 11th grade students who choose to return to a traditional school will re-enroll at SOUL at a later time. Students often discover that upon return to a “traditional” high school, many of the same barriers and pitfalls are still present, further contributing to the students’ cycle of failure.

[Charter School Goals, Measurable Outcomes, and Methods of Measurement](#)

[For purposes of this material revision, insofar as the law has changed in relation to the Eight State Priorities and law related to the Charter School’s goals, measurable outcomes, and methods of measurement, pursuant to Education Code Sections 47605\(c\)\(5\)\(A\)\(ii\) and 47605\(c\)\(5\)\(B\), a reasonably comprehensive description of the Charter School’s operative annual goals, actions and measurable outcomes, both schoolwide and for each subgroup of pupils, in and aligned with the Eight State Priorities as described in Education Code Section 52060\(d\), can be found in the Charter School’s LCAP. Each of these goals addresses the unique needs of all students attending the Charter School, including our numerically significant student subgroups. The current LCAP is on file with the District.](#)

Element B: Measurable Pupil Outcomes

"The measurable pupil outcomes identified for use by the charter school. "Pupil outcomes," for purposes of this part, means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the charter school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all pupil subgroups served by the charter school, as that term is defined in subdivision (a) of Section 52052. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served by the charter school. Education Code Section 47605(cb)(5)(B)."

Review of 2013-2018 Charter Goals

Green= met or exceeded goal, Yellow = making progress toward goal, Red = did not meet goal.

Pupil Outcomes																																												
Academic Goals	Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)																																								
SOUL will increase the annual pass rate of the California High School Exit Exam in both and Language Arts	California High School Exit Exam	Annually	Minimum increase of 2 percentage points per year for a five year period ending June 2018.	<table><thead><tr><th></th><th colspan="2">Math</th><th colspan="2">ELA</th></tr><tr><th></th><th>Target</th><th>Actual</th><th>Target</th><th>Actual</th></tr></thead><tbody><tr><td>2013:</td><td>23%</td><td>20%</td><td>31%</td><td>31%</td></tr><tr><td>2014:</td><td>25%</td><td>22%</td><td>33%</td><td>32%</td></tr><tr><td>2015:</td><td>27%</td><td>36%</td><td>35%</td><td>47%</td></tr><tr><td>2016:</td><td colspan="4">Discontinued</td></tr><tr><td>2017</td><td colspan="4">Discontinued</td></tr></tbody></table>		Math		ELA			Target	Actual	Target	Actual	2013:	23%	20%	31%	31%	2014:	25%	22%	33%	32%	2015:	27%	36%	35%	47%	2016:	Discontinued				2017	Discontinued								
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SOUL will increase the number of students performing at grade level or above in both Reading and Math.	Test of Adult Basic Education (TABE) California High School Exit Exam Edmentum Accucess (Pre-tests, Post-tests, and Prescriptions) Achieve 3000	Annually	Minimum increase of 4 percentage points in Math and 2 percentage points per year in Reading and for a five year period ending June 2018.	<table><thead><tr><th></th><th colspan="2">Math</th><th colspan="2">Reading</th></tr><tr><th></th><th>Target</th><th>Actual</th><th>Target</th><th>Actual</th></tr></thead><tbody><tr><td colspan="5">TABE</td></tr><tr><td>2014:</td><td>26%</td><td>52%</td><td>54%</td><td>55%</td></tr><tr><td colspan="5">ACCUCES</td></tr><tr><td>2015:</td><td>30%</td><td>63%</td><td>56%</td><td>78%</td></tr><tr><td>2016:</td><td>34%</td><td>60%*</td><td>58%</td><td>67%*</td></tr><tr><td>2017:</td><td>38%</td><td>49%*</td><td>60%</td><td>60%*</td></tr></tbody></table> <p><i>*Note: Despite meeting the established percentage target, math and reading scores denote a two-year downward trend.</i></p>		Math		Reading			Target	Actual	Target	Actual	TABE					2014:	26%	52%	54%	55%	ACCUCES					2015:	30%	63%	56%	78%	2016:	34%	60%*	58%	67%*	2017:	38%	49%*	60%	60%*
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SOUL will increase subject standards proficiency percentages on State standardized tests.	California Standards Tests (CSTs)	Annually	Minimum 4% increase in proficiency levels in English, Science, and Social Science each year for a five year period ending June 2018	<table><tr><td>Subject</td><td>Base</td><td>2013</td><td rowspan="9">Discontinued in 2014</td></tr><tr><td>ELA 9</td><td>13%</td><td>7%</td></tr><tr><td>ELA 10</td><td>14%</td><td>16%</td></tr><tr><td>ELA 11</td><td>6%</td><td>3%</td></tr><tr><td>Alg 1</td><td>7%</td><td>0%</td></tr><tr><td>Geometry</td><td>0%</td><td>0%</td></tr><tr><td>US History</td><td>4%</td><td>7%</td></tr><tr><td>Wld Hist</td><td>6%</td><td>25%</td></tr><tr><td>Biol</td><td>3%</td><td>2%</td></tr><tr><td>Earth</td><td>23%</td><td>4%</td></tr></table>	Subject	Base	2013	Discontinued in 2014	ELA 9	13%	7%	ELA 10	14%	16%	ELA 11	6%	3%	Alg 1	7%	0%	Geometry	0%	0%	US History	4%	7%	Wld Hist	6%	25%	Biol	3%	2%	Earth	23%	4%																		
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SOUL will increase the number of students meeting or exceeding standards on State standardized tests in ELA and math.	CAASPP	Annually	Minimum 3% per year increase of students meeting or exceeding standards in CAASPP ELA and Math	<table><tr><td colspan="6">Percentage of Students Who Met or Exceeded Standard</td></tr><tr><td></td><td colspan="3">2016</td><td colspan="2">2017</td></tr><tr><td></td><td>Base</td><td>Target</td><td>Actual</td><td>Target</td><td>Actual</td></tr><tr><td>ELA</td><td>8%</td><td>11%</td><td>18%</td><td>14%</td><td>16%</td></tr><tr><td>Math</td><td>3%</td><td>6%</td><td>0%</td><td>9%</td><td>2%</td></tr></table>	Percentage of Students Who Met or Exceeded Standard							2016			2017			Base	Target	Actual	Target	Actual	ELA	8%	11%	18%	14%	16%	Math	3%	6%	0%	9%	2%																			
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SOUL will increase its annual graduation rate.	<div>CDE Graduation Rate</div> <div>CDE Dataquest</div> <div>SOUL Internal Graduation Rate</div>	Annually	<div>SOUL's graduation rate will meet or exceed California's minimum graduation rate as set by CDE based on a 5Y Cohort measurement.</div> <div>Internal graduation rate will meet or exceed 90% each year.</div>	<div>Using 2012 baseline data, SOUL will meet or exceed California's minimum graduation rate set by the CA Department of Education.</div> <table><tr><td></td><td colspan="3">CDE Rate</td></tr><tr><td></td><td>4Yr *</td><td>5 Yr *</td><td>CDE Target Met</td></tr><tr><td>2013</td><td>33%</td><td>33%</td><td>Y</td></tr><tr><td>2014</td><td>25%</td><td>44%</td><td>Y</td></tr><tr><td>2015</td><td>20%</td><td>44%</td><td>Y</td></tr><tr><td>2016</td><td>35%</td><td>41%</td><td>Y</td></tr><tr><td>2017</td><td>TBD</td><td>TBD</td><td></td></tr></table> <div>*4 year cohort from CDE Dataquest</div> <div>*5 year cohort from CDE AYP reports</div> <div>Internal Graduation Rate is determined by the number of 12th grade students who need 70 credits or fewer to graduate. This calculation does not reflect the 12th grade students who need 70 or more credits and not expected to graduate in that school year.</div> <div>Internal Graduation Rate</div> <table><tr><td></td><td>Internal</td><td>Internal</td></tr><tr><td>Year</td><td>Goal</td><td>Actual</td></tr><tr><td>2013</td><td>90%</td><td>86%</td></tr><tr><td>2014</td><td>90%</td><td>90%</td></tr><tr><td>2015</td><td>90%</td><td>93%</td></tr><tr><td>2016</td><td>90%</td><td>94%</td></tr><tr><td>2017</td><td>90%</td><td>94%</td></tr></table>		CDE Rate				4Yr *	5 Yr *	CDE Target Met	2013	33%	33%	Y	2014	25%	44%	Y	2015	20%	44%	Y	2016	35%	41%	Y	2017	TBD	TBD			Internal	Internal	Year	Goal	Actual	2013	90%	86%	2014	90%	90%	2015	90%	93%	2016	90%	94%	2017	90%	94%
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Pupil Outcomes	Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)																	
SOUL students will demonstrate increased connectedness and motivation for academic success.	Daily attendance records	Ongoing Annually	90% or better attendance in both the classroom-based and Independent Study programs each year for the five year period ending June 2018.	<p>Baseline attendance rate was based on 2011/2012 P2 attendance rate of 85% in classroom based and 80% in Independent Study.</p> <p>Target attendance rate for all years is 90% ADA to Enrollment</p> <table><tr><td>2013</td><td>82%</td></tr><tr><td>2014</td><td>90%</td></tr><tr><td>2015</td><td>92%</td></tr><tr><td>2016</td><td>95%</td></tr><tr><td>2017</td><td>90%</td></tr></table>	2013	82%	2014	90%	2015	92%	2016	95%	2017	90%							
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Suspension Report to California Dept. of Education (School Accountability Report Card)	Annually	Decrease suspension percentages by 5% each year for the five year period ending June 2018.	<p>Baseline suspension rate was based on 2011/2012 CDE suspension rate. Suspension percentages were 33% of total classroom based student enrollment.</p> <table><tr><th></th><th>Target</th><th>Actual</th></tr><tr><td>2013</td><td>33%</td><td>14%</td></tr><tr><td>2014</td><td>28%</td><td>15%</td></tr><tr><td>2015:</td><td>23%</td><td>16%</td></tr><tr><td>2016:</td><td>18 %</td><td>11%</td></tr><tr><td>2017:</td><td>13 %</td><td>6%</td></tr></table>		Target	Actual	2013	33%	14%	2014	28%	15%	2015:	23%	16%	2016:	18 %	11%	2017:	13 %	6%
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Case management student files SOUL's Heart and Soul Club Community Service Participation Log.	Bi-annually	75% of all classroom-based students enrolled 90 days or more will participate in a minimum of 10 hours of extracurricular/ volunteer activities per semester.	<table><tr><th>Year</th><th>Actual</th></tr><tr><td>2013</td><td>78%</td></tr><tr><td>2014</td><td>80%</td></tr><tr><td>2015</td><td>82%</td></tr><tr><td>2016</td><td>Discontinued due to reduction in staffing</td></tr></table>	Year	Actual	2013	78%	2014	80%	2015	82%	2016	Discontinued due to reduction in staffing								
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Pupil Outcomes	Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)
SOUL students will value and demonstrate knowledge of post-secondary education and career choices.	Career class roster Job shadowing logs College enrollment data Career assessment data	Annually	100% of graduates will have completed a career assessment, A minimum of 90% of graduates will have a post-secondary plan.	100% of all graduates will have completed a career assessment. 2013 100% 2014 100% 2015 100% 2016 100% 2017 100% 90% of graduates will have a post-secondary plan. 2013 100% 2014 100% 2015 100% 2016 100% 2017 100%
Green = met or exceeded goal, Yellow = making progress toward goal, Red = did not meet goal. Above data found on pages 4-8.				

Table 1: Pupil Outcomes Table – 2013-2018

The School of Unlimited Learning has met some of its charter goals within the current charter petition period. The following charts represent the four academic goals and two schoolwide goals stated in the current charter petition. The academic goals of the School of Unlimited Learning for the five-year period ending June 2018 are as follows:

Charter Goal	Progress Year to Date
SOUL will increase the annual pass rate of students taking the California High School Exit Exam two percentage points per year for a five year period ending June 2018.	From the 2013/2014 school year until CAHSEE was discontinued, SOUL met or made progress toward its goals, averaging 3-year growth rate by 20% in math and 18% in English language arts.
SOUL will increase the number of students performing at or above grade level in both reading and math each year for a five-year period ending June 2018.	Although SOUL met its established goals, for three consecutive years there was a downward trend in both reading and math in the percentage of students meeting or exceeded grade level.
SOUL will increase the percentage of students scoring at the proficient and advanced levels on the California Standardized Tests (CSTs) in English, Math, Social Science and Science by four percentage points each year for the five-year period ending June 2018.	Goal was discontinued due to elimination of California Standardized Testing during the first year of the charter. The goal was readdressed using test scores from the California Assessment of Student Performance and Progress (CAASPP).
Using the 2015 CAASPP test results as a baseline, SOUL will increase the percentage of students meeting or exceeding the standard by three percentage points in both ELA and Math	SOUL has exceeded its projected growth in ELA, but has fallen short in Math for the past two years. SOUL has performed lower than traditional high schools, but has outperformed similar alternative schools in most areas. All subgroups demonstrate a need for greater prescriptive efforts to address ELA and Math proficiency levels.
Each year for a five-year period ending June 2018, SOUL's graduation rate will meet or exceed SOUL's California cohort graduation rate goal set by the California Department of Education.	SOUL met or exceeded its state graduation rate all four years based on the alternative "five-year cohort method" which is used by the State for schools that do not meet the State target but have at least one additional graduate in the 5 year cohort. SOUL's internal graduation rate averaged 90% or above for four of the past five years.

Table 2: Progress toward academic charter goals: 2013-2018

The table below highlights SOUL's schoolwide goals for the five-year period ending June 2018:

Charter Goal	Progress Year to Date
SOUL students will demonstrate increased connectedness and motivation for academic success.	SOUL's schoolwide attendance rates have increased steadily over the past five years, while suspension rates have declined.
SOUL students will value and demonstrate knowledge for post-secondary education and career choices.	During the past five years, SOUL has increased its career technical education offerings and developed partnerships with the community to expose students to a wider array of career education opportunities.

Table 3: Progress toward schoolwide charter goals: 2013-2018

For the past five years, SOUL has met or made progress toward meeting most of its charter goals. For the upcoming charter renewal cycle, the School of Unlimited Learning stakeholder groups have worked with the school's leadership team to address performance goals and outcomes that are closely aligned with SOUL's WASC Schoolwide Action Plan and Local Control and Accountability Plan. An action plan for meeting the goals in the new charter has been developed for the goals which were not met in the current charter.

During the past five years, the State of California has undergone a myriad of significant changes. In 2014, the California Standardized Testing (CST) system was suspended in preparation for the Common-Core aligned CAASPP testing. Likewise, in 2016, the California High School Exit Exam was suspended. These two high-stakes testing systems constituted two schoolwide charter goals, which were modified due to State changes. Established in 2013, the Local Control Funding Formula restructured school funding in California and created the Local Control and Accountability Plan (LCAP), which requires each school district to engage parents, educators, employees and the community to establish these plans. The LCAP describes the school district's overall vision for students, annual goals and specific actions the district will take to achieve the vision and goals, and demonstrate how the district's budget will help achieve the goals, and assess each year how well the strategies in the plan were able to improve outcomes.

SOUL's academic performance results and subsequent program improvement efforts have resulted in changes to measurable pupil outcomes and learning goals. For the next five years, SOUL has defined two academic goals and two schoolwide goals, which are fully aligned with SOUL's Local Control Accountability Plan and WASC Action Plan. The school's research-based instructional practices and complementing curricular alignment with Common Core State Standards focus on professional development activities and the improvement of Common Core standards-based instruction. SOUL's new charter goals address the gaps and deficiencies in student academic performance as evidenced by the compilation and analysis of student data over the last five-year period.

New 2018-2023 Charter Goals

For purposes of this material revision, insofar as the law has changed in relation to the Eight State Priorities and law related to the Charter School's goals, measurable outcomes, and methods of measurement, pursuant to Education Code Sections 47605(c)(5)(A)(ii) and 47605(c)(5)(B), a reasonably comprehensive description of the Charter School's operative annual goals, actions and measurable outcomes, both schoolwide and for each subgroup of pupils, in and aligned with the Eight State Priorities as described in Education Code Section 52060(d), can be found in the Charter School's LCAP. Each of these goals addresses the unique needs of all students attending the Charter School, including our numerically significant student subgroups. The current LCAP is on file with the District.

This section will present the new charter goals in light of the past five years of student data as of the Charter School's most recent renewal. The academic goals of the School of Unlimited Learning for the five-year period ending June 2023 shall include the following:

- Academic Goal 1: Improve student academic performance and college and career readiness by increasing reading and math levels of all SOUL Students.
- Academic Goal 2: Create greater student access to post-secondary opportunities by increasing school graduation rate.
- Schoolwide Goal 1: Increase student connectedness and motivation for academic success during and beyond high school through increased student attendance and greater exposure to career education opportunities.
- Schoolwide Goal 2: Increase student success through active parent participation, involvement, and engagement.

New Charter Academic Goal 1: Improve student academic performance and college and career readiness by increasing reading and math levels of all SOUL students.

Nearly 80% of all students who enroll in SOUL are severely skill deficient in math and/or reading. Since SOUL's inception nearly 20 years ago, the average entry reading level for incoming SOUL students remained consistent at a 6.5 grade level, whereas math levels have consistently averaged a 5.5 grade level. The averages of students coming from traditional high schools have remained virtually unchanged for the past five years. Close monitoring of student reading and math levels will continue to provide SOUL ongoing data regarding student achievement, and will assist in determining intervention needs.

Analysis of Student Data

Surrounding and Similar Schools Performance Data

The California Assessment of Student Performance and Progress data measures performance of 11th grade students taking the CAASPP ELA and Math exams. All available performance data from the California Department of Education website were used to compare three years of SOUL CAASPP results with those of surrounding and similar schools. To determine which schools were used for comparisons, SOUL calculated the numbers of students who enrolled in SOUL from each of the surrounding schools. The two traditional high schools with the highest population enrolling at SOUL over the past 5 years were Roosevelt and Fresno High. The performance of these traditional, comprehensive high schools (labeled “FUSD”) was compared to SOUL’s data. Comparisons of schools similar to SOUL’s demographics included two Fresno Unified alternative schools, Cambridge and J.E. Young, and a Fresno area charter school, Carter G. Woodson (labeled “Similar”). All scores reflect 11th grade student results, since CAASPP tests only 11th grade high school students.

CAASPP Overall ELA Proficiency- Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	44%	38%	39%
Fresno High	40%	31%	44%
Similar			
SOUL	8%	18%	16%
JE Young	9%	11%	11%
Cambridge	2%	9%	2%
Woodson	1%	10%	20%

Table 4: 3-yr comparison of overall 11th Grade CAASPP ELA proficiency. (Source: CDE)

CAASPP Overall Proficiency – Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	9%	9%	6%
Fresno High	8%	8%	8%
Similar			
SOUL	3%	0%	2%
JE Young	1%	1%	0%
Cambridge	1%	0%	0%
Woodson	0%	1%	0%

Table 5: 3-yr comparison of overall 11th Grade CAASPP Math proficiency. (Source: CDE)

As depicted in the tables above, in 2016, SOUL made a significant increase in ELA over the previous year, but dropped slightly in 2017. In overall math scores, SOUL dropped in 2016 over the previous year, but made slight gains in 2017.

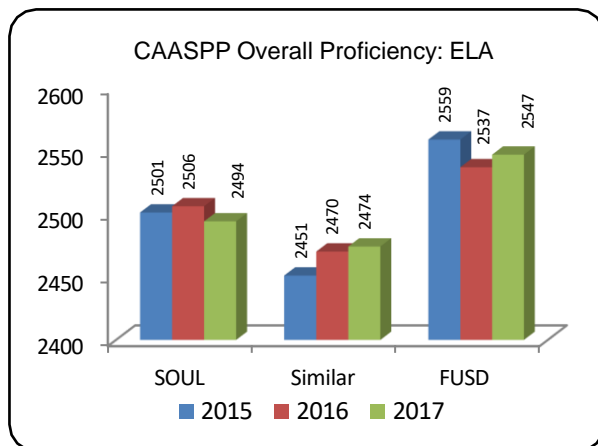


Chart 1: 3-year comparison of overall ELA mean scale scores. (Source: CDE)

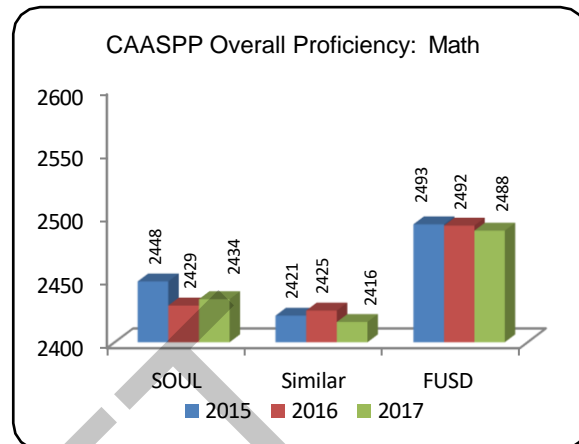


Chart 2: 3-yr comparison of overall math mean scale scores. (Source: CDE)

CAASPP results are presented in two ways. According to the CDE website, achievement level descriptors (not met, nearly met, met, and exceeded) are intended to aid interpretation of the four categories; however, they are less precise than scaled scores for describing student growth or changes in achievement gaps among groups of students since they do not reveal changes of student scores within the four levels. For the purposes of comparing SOUL's overall performance on CAASPP, only the top two Achievement Levels reported, failing to provide a detailed comparison of the overall performance of students. When comparing the average mean scale scores of SOUL to the average mean scale scores of the similar schools, SOUL has outperformed the similar schools for the past three years.

Comparisons by Subgroups

Due to SOUL's small enrollment, only three subgroups yielded reportable data: ethnicity, socioeconomically disadvantaged, and gender. Two SOUL subgroups- English learners and students with disabilities- were too small to yield reports.

Comparison by Ethnicity

Within the subgroup Ethnicity, only "Hispanic" was large enough to yield reportable results for SOUL. The tables below provide three-year comparative data of 11-grade students for the subgroup "Hispanic". The percentages of students who met or exceeded the standards were varied among

all of the similar schools, but SOUL scored the same or higher than 50% of the similar schools in the number of Hispanic students who met or exceeded standards all three years.

CAASPP ELA Proficiency: Hispanic- Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	41%	37%	36%
Fresno High	38%	31%	43%
Similar			
SOUL	10%	15%	10%
JE Young	10%	11%	11%
Cambridge	2%	8%	2%
Woodson	2%	10%	21%

Table 6: 3-yr comparison CAASPP 11th Grade ELA Proficiency- Hispanic. (Source: CDE)

CAASPP Proficiency: Hispanic- Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	7%	7%	6%
Fresno High	7%	6%	10%
Similar			
SOUL	0%	0%	3%
JE Young	0%	0%	0%
Cambridge	1%	0%	0%
Woodson	0%	1%	0%

Table 7: 3-yr comparison CAASPP 11th Grade Proficiency- Hispanic. (Source: CDE)

Comparison by Socio-Economically Disadvantaged

SOUL's socio-economically disadvantaged 11th grade students increased significantly from 2015 to 2016, but dropped in 2017. In Math, SOUL increased in 2017 after two years of zero percent of 11th grade students who met or exceeded the standard. In comparing similar schools, SOUL had a higher percentage of students who met or exceeded the standards in ELA two of the three years, outperforming JE Young and Cambridge all three years. The percentage of students who met or exceeded the standards in Math was low for all similar schools; however SOUL experienced an increase in Math achievement levels in 2017.

CAASPP ELA Socioeconomically Disadvantaged Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	42%	35%	37%
Fresno High	39%	29%	44%
Similar			
SOUL	5%	19%	13%
JE Young	5%	10%	11%
Cambridge	2%	7%	2%
Woodson	1%	7%	19%

Table 8: 3-yr comparison of CAASPP 11th grade ELA Proficiency: Socio-Economically Disadvantaged. (Source: CDE)

CAASPP Socioeconomically Disadvantaged Standard Met or Exceeded			
	2015	2016	2017
FUSD			
Roosevelt	8%	8%	6%
Fresno High	9%	8%	9%
Similar			
SOUL	0%	0%	3%
JE Young	0%	1%	0%
Cambridge	1%	0%	0%
Woodson	0%	1%	0%

Table 9: 3-yr comparison of CAASPP 11th Grade Proficiency: Socio-Economically Disadvantaged. (Source: CDE)

Subgroup Comparison by Gender

CAASPP English Language Arts

Consistent with SOUL's overall performance and that of other subgroups, in 2017 SOUL experienced a decrease in ELA among 11th grade males after a significant increase the previous year. Conversely, SOUL's 11th grade females increased steadily over the three-year period, outperforming the similar schools in 2016 and 2017.

	CAASPP ELA: Male Standard Met or Exceeded		
	2015	2016	2017
FUSD			
Roosevelt	43%	28%	30%
Fresno High	35%	29%	30%
Similar			
SOUL	9%	17%	11%
JE Young	5%	7%	8%
Cambridge	1%	9%	3%
Woodson	2%	4%	16%

Table 10: 3-yr comparison of CAASPP 11th Grade Proficiency: [Male](#) (Source CDE)

	CAASPP ELA Proficiency: Female Standard Met or Exceeded		
	2015	2016	2017
FUSD			
Roosevelt	45%	45%	47%
Fresno High	45%	35%	56%
Similar			
SOUL	7%	20%	25%
JE Young	11%	15%	15%
Cambridge	4%	8%	1%
Woodson	0%	15%	24%

Table 11: 3-yr comparison of CAASPP 11th grade ELA proficiency: Female. (Source: CDE)

CAASPP Math

CAASPP Math proficiency results revealed that after two years of zero percent of SOUL's 11-grade male students meeting or exceeding the standard, SOUL was the only school among similar schools to increase its percentages in 2017. Conversely, SOUL's 11th grade female students experienced two consecutive years of zero percent meeting or exceeding the standard in math after dropping significantly from 2015 proficiency levels.

**CAASPP Math Proficiency: Male
Standard Met or Exceeded**

	2015	2016	2017
FUSD			
Roosevelt	11%	8%	8%
Fresno High	9%	9%	9%
Similar			
SOUL	0%	0%	4%
JE Young	1%	1%	0%
Cambridge	1%	0%	0%
Woodson	0%	0%	0%

Table 12: 3-yr comparison of 11th Grade CAASPP Math Proficiency: Male. (Source: CDE)

**CAASPP Math Proficiency: Female
Standard Met or Exceeded**

	2015	2016	2017
FUSD			
Roosevelt	7%	9%	4%
Fresno High	6%	6%	7%
Similar			
SOUL	6%	0%	0%
JE Young	0%	1%	0%
Cambridge	0%	0%	0%
Woodson	0%	2%	2%

Table 13: 3-yr comparison of 11th Grade CAASPP Math Proficiency: Female. (Source: CDE)

Internal Data: Accucess Reading and Math Tests by Edmentum's Plato Systems

To measure student ongoing progress in reading and math, SOUL uses Edmentum's Accucess assessments. Students are given a pre-test, a mid-year test, and posttest each year to determine growth in reading and math. A student who scores 1000 or above is considered to be at grade level. Accucess creates an individualized prescription based on students' pre-test scores.

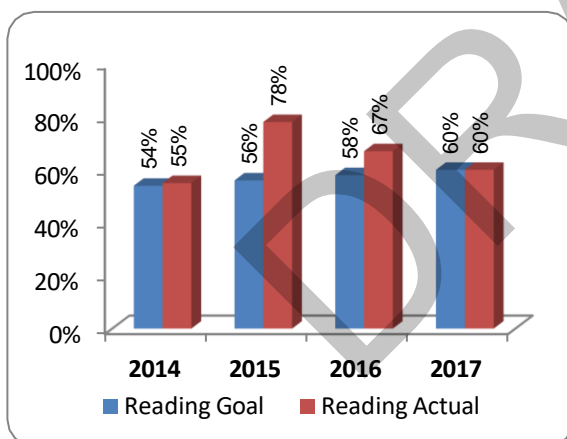


Chart 3: Four-year schoolwide percentage gains in reading. (Source: TABE and Accucess)

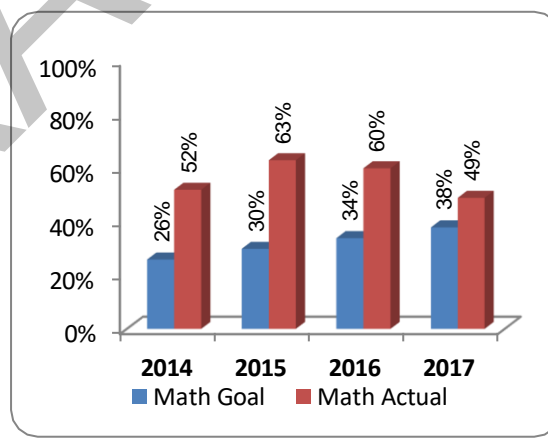


Chart 4: Four-year schoolwide percentage gains in math. (Source: TABE and Accucess)

During the 2013/2014 school year, SOUL students were given the Test of Adult Basic Education (TABE) 9 and 10 pre-test and post-test in math and reading. Due to SOUL's open entry admissions policy, pre-test and post-test dates were varied. Using TABE results from 2013, a baseline of 52% grade-level proficiency in reading and 22% grade-level proficiency in math, SOUL set as a goal in 2014 an annual increase of two percentage points in reading and four percentage points in math, with the overall goal of 62% in reading and 42% in math by 2018. It should be

noted that the goals were originally written using a baseline from only TABE results, which had revealed lower levels of achievement. The integration of multiple indicators resulted in higher student achievement outcomes. Since the original reading and math targets remained unchanged, it may appear that the goals were underestimated.

Prior to 2014, SOUL used TABE exclusively to measure growth in reading and math proficiency. Because TABE was a “no-stakes” test and many of SOUL’s high achieving students were not scoring well on post-tests, additional indicators were adopted. Using multiple measures is a more comprehensive indicator of student growth. In Fall 2014, TABE was replaced by Edmentum’s Accucess pre and post-tests and online reading and math prescriptions. CAASPP results replaced CAHSEE reading and math when CAHSEE was discontinued. Students who met or exceeded the standards on CAASPP were considered at grade level; however CAASPP measures only 11th grade student performance. Achieve 3000 was adopted to measure lexile level growth of all students. Using multiple measures, if students meet grade level in any of the indicators, they are counted among the students who met grade level.

As depicted in the table below, SOUL exceeded its established goals for all four years in both reading and math. However, despite this accomplishment, the data reveal a downward trend for the past three years. A possible explanation for SOUL’s downward trend was the elimination of CAHSEE. As a high-stakes test, CAHSEE encouraged more students to study harder to meet grade level standards by passing in order to graduate. When CAHSEE was discontinued, many students had little or no incentive to perform well on Accucess pre and post-tests or CAASPP.

	2013/2014			2014/2015		2015/2016		2016/2017	
	Baseline	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Reading	52%	54%	55%	56%	78%	58%	67%	60%	60%
Math	22%	26%	52%	30%	63%	34%	60%	38%	49%

Table 14: SOUL’s Projected goals and actual reading and math at grade level: 2014-2017. (Source: TABE and Accucess)

Gains by Type of Program

During the 2014/2015 school year, with the adoption of Edmentum’s online Accucess testing, and the subsequent individualized prescriptions to assist students in reaching grade level, SOUL began to include in its reporting the students who tested at or reached grade level by the end of the year. The charts below depict gains in reading and math by program. “Seated” refers to the classroom based program, while “IS” refers to the Independent Study Program. In reading, the seated and Independent Study programs met or exceeded their goals in three of the four years of the current charter period. With respect to math, the seated program met its goals all four years, while the Independent Study program met or exceeded its goals three of the four years. However, the same downward trend over the past three years is evident in both the seated and Independent Study programs. Students in the Independent Study Program performed significantly lower than those in the seated program.

	Reading			Math		
	Goal	Seated	IS	Goal	Seated	IS
2014	54%	51%	58%	26%	60%	44%
2015	56%	93%	71%	30%	80%	55%
2016	58%	77%	62%	34%	85%	46%
2017	60%	74%	53%	38%	76%	35%

Table 15: SOUL's projected goals and actual reading and math grade-level gains by program: 2014-2017. (Source: TABE and Accucess)

Gains by Grade Level

In the absence of State STAR testing, an analysis by grade level was conducted using Accucess data from 2015 to 2017. Since CAASPP measures only 11th grade student performance, Accucess results reveal student levels of performance in reading and math for all grades. Although CAASPP revealed a downward trend all three years, the 11th grade Accucess data demonstrates an actual upward trend in both math and reading.

	2015		2016		2017	
Reading	pre	post	pre	post	pre	post
9	791	962	782	948	764	889
10	617	710	748	901	759	889
11	840	928	816	931	771	990
12	822	891	816	961	906	1033
	2015		2016		2017	
Math	pre	post	pre	post	pre	post
9	612	631	675	707	677	862
10	795	862	599	773	609	890
11	660	751	674	779	693	822
12	657	751	656	790	763	860

Table 16: Accucess 3- year pre and post-test averages by grade level. (Source: Accucess)

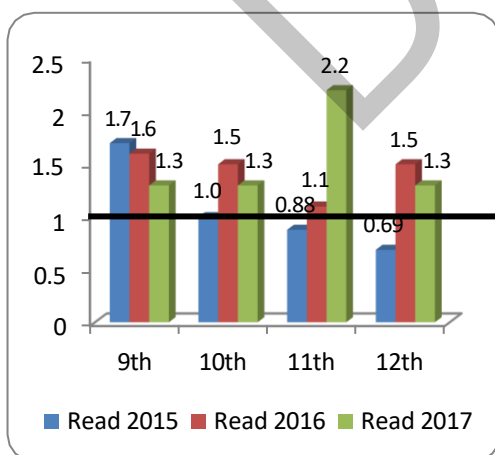


Chart 5: Accucess Reading 3-year pre and post-test gains by grade level. (Source: Accucess)

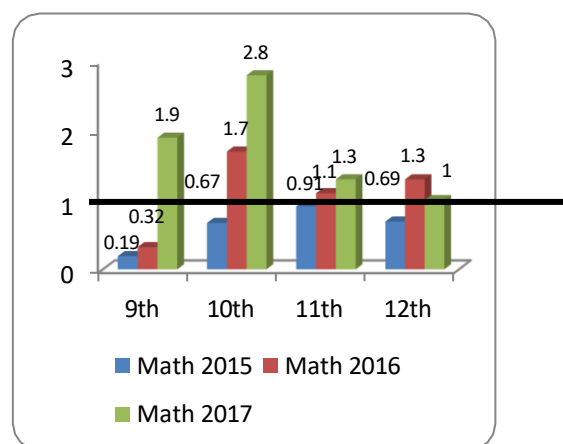


Chart 6: Math: 3- year pre and post-test gains by grade level. (Source: Accucess)

With respect to reading, in 2015, only 9th grade students made a grade-level gain of one year or more. However, for the following two years, each grade level met or exceeded a one-year or more

gain. In math, all grades fell below the goal of a one-grade level gain in 2015. However, grades 9 through 11 made gains each year, while grade 12 dropped in 2017 after having made gains the previous year. Notwithstanding the declines in 2017, grades 10 through 12 met or exceeded a one-year gain two of the three years. Ninth graders exceeded the goal in reading, and made significant gains in math in 2017, after falling short of the goal the previous two years. The most significant gains in math were made in grades 9 and 10 during 2017. It must be noted that 11th and 12th grade students constitute over 70% of SOUL's student enrollment. Consequently, the significant gains in 9th and 10th grade reading have a limited impact on the overall percentage of student gains.

California High School Exit Exam

SOUL administered the CAHSEE through the 2014/2015 school year, at which time it was suspended by the California Department of Education. The California High School Exit Exam served as an indicator of SOUL students' math and reading proficiency levels, as well as of SOUL's graduation rate. SOUL collected and reported CAHSEE data by overall program and by grade level.

Overall CAHSEE Pass Rates

Consistent with SOUL charter goals, SOUL set as a minimum goal a 2% annual increase in ELA and pass rates each year for the three-year period ending in 2015. SOUL exceeded its goals in ELA two of the three years. Conversely, SOUL's CAHSEE Math scores fell short in the first two years, but exceeded its goal in 2014/2015.

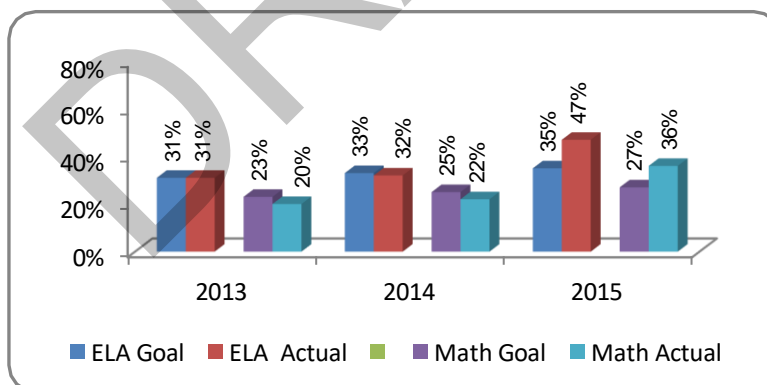


Chart 7: SOUL CAHSEE ELA and math pass rates: 2013-2015.
(Source: CAHSEE Summary Reports, CDE)

As indicated in the table below, SOUL's overall pass rate in English Language Arts from 2013-2015 was 39%, exceeding the overall three-year pass rate goal average of 33%. Likewise, SOUL's average pass rate in math was 30%, which exceeded the three-year pass rate goal average of 25%.

	2013	2014	2015	Avg. Pass Rates
Goal: ELA Pass Rate	31%	33%	35%	33%
Actual: ELA Pass Rate	31%	32%	47%	39%
Goal: Pass Rate	23%	25%	27%	25%
Actual: Pass Rate	20%	22%	36%	30%

Table 17: SOUL's 3- year projected and actual CAHSEE ELA and Math pass rates.
(Source: CAHSEE Summary Reports, CDE)

CAHSEE Pass Rates by Grade

When examining the CAHSEE ELA and pass rates by grade, SOUL's 10th grade students performed significantly better than the 11th and 12th grade students overall. Since 2013, SOUL's 10th grade students averaged a 49% annual pass rate in ELA (or 14% over the base year), whereas the 11th and 12th grade students averaged a 28% pass rate (7% average decrease over the base year). With respect to SOUL's 10th grade students significantly outperformed their 11th and 12th grade counterparts with an average five-year pass rate of 44% (25% average increase above the base year) as compared to a 23% average five-year pass rate (4% average increase over the base year) for 11th and 12th grade students.

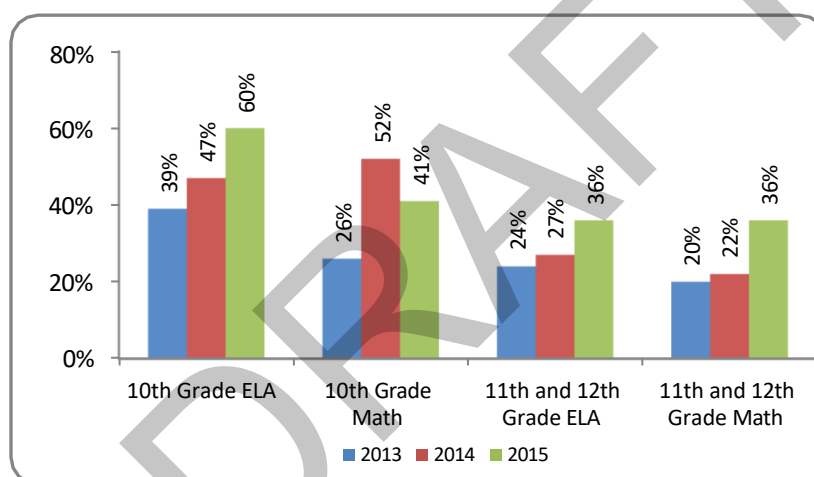


Chart 8: SOUL CAHSEE ELA and math pass rates by grade level: 2013-2015.
(Source: CAHSEE Summary Reports, Fresno Unified)

A comparison of the three-year average CAHSEE ELA rates by grade level revealed that 10th grade students outperformed 11th and 12th graders by 21% points. Likewise, the 10th grade students who took the CAHSEE Math test outperformed their 11th and 12th grade counterparts by 21 percentage points.

CAHSEE	2013	2014	2015	Avg. pass rate
10 th Grade ELA Pass Rate	39%	47%	60%	49%
10 th Grade Pass Rate	26%	52%	41%	44%
11 th and 12 th Grade ELA Pass Rate	24%	27%	36%	28%
11 th and 12 th Grade Pass Rate	20%	22%	36%	23%

Table 18: SOUL CAHSEE ELA and math pass rates by grade level: 2013-2015 (Source: CAHSEE Summary Reports, CDE)

Implications

Intervention resources for skills deficient students, including English learners, have increased over the past three years. Students with deficiencies in reading and math were assigned individualized reading and/or math prescriptions to bring them to grade level. For Independent Study students, a tutorial schedule was devised for all skills deficient students, with scheduled time to work on their prescriptions before or after their appointments, or at any time before, during, or after school. The inclusion of Achieve 3000's reading improvement program into all core classes has provided additional support to students through a differentiated instructional approach. Achieve 3000 is aligned with State of California Core standards, and also incorporates literacy and ELD standards. Achieve 3000 has proven to be a valuable supplemental tool in developing literacy skills and increasing lexile levels. All teachers maintain a tutorial one day per week after school hours to assist Independent Study students performing below grade level in reading and math. ~~Classroom-based students are also encouraged to stay after school during their tutorial to work on their prescriptions.~~

Areas for Improvement/Growth

A comprehensive review of SOUL's Charter Goals over the past five years reveals progress has been made in some areas with respect to increased student achievement, while some deficiencies exist in other areas. Notwithstanding increases in intervention resources, scores for reading and math reveal a slight downward trend for three consecutive years. A primary cause for the decline in reading and math scores is that most Independent Study students have not taken advantage of their tutorial options and have not made their math and reading prescriptions a priority. Moreover, monitoring of student progress and growth in reading and math proficiency has been inconsistent.

Overall, comparing SOUL's CAASPP results to those of traditional, comprehensive high schools and similar schools, SOUL has outperformed similar schools in most areas, while lagging behind traditional schools. Increased efforts must be made to ensure that a greater percentage of students meet or exceed the standards in both English language arts (ELA) and Math.

SOUL has identified curricular gaps in its program, specifically in regards to preparing students for the CAASPP. More than half of SOUL's 11th grade students enroll well into their 11th grade year and have not previously passed Algebra I. Few 11th graders have the opportunity to take Algebra II prior to their taking the CAASPP test. A large percentage of the questions on the CAASPP include Algebra II standards. Curricular changes are needed to address this challenge.

Action Plan

A strategic, prescriptive approach is needed to address deficiencies. To reverse the downward trend in ELA and math proficiency, in Spring 2018, SOUL formalized a process to monitor mandatory prescriptions for all students in both instructional programs. Student progress and growth in reading and math proficiency is consistently monitored by teachers on a weekly basis. ~~All classroom-based students attend a 60-minute study hall once a week. Independent Study students attend an additional hour per week to work on their reading and math prescriptions.~~

~~Teachers are available to assist all students individually or in small groups. Moreover, Skills-~~deficient students ~~in both the classroom-based and Independent Study programs~~ will be required to take an additional ELA and/or math skills course to address their deficiencies. English learners ~~enrolled in Independent Study~~ will be assigned an English intervention class every week in addition to their Independent Study coursework.

In response to SOUL's achievement gap in CAASPP ELA and Math, SOUL will utilize the Northwest Education Association's Measures of Academic Progress (MAP) Interim Assessments, which are designed to measure a student's academic achievement and to calculate academic growth throughout the year. Beginning in the 2018-2019 school year, the Interim Assessments will be administered in the fall, winter, and spring of each year. Interim Assessments will serve as quarterly benchmarks, since they are aligned to California Common Core English language arts and math standards. Teachers will use MAP assessment results to guide instruction, which will provide a comprehensive picture of student learning: how much they've grown, what they're ready to learn, and the specific skill gaps they need to master.

Interim Assessments will measure progress toward meeting grade-level standards, allowing SOUL teachers to meticulously monitor each student's strengths and deficiencies by connecting assessment data to instruction. Interim Assessments are aligned to both the Edmentum and Achieve 3000 curricula used by SOUL. Whether a student enrolls at the beginning of the school year or mid-year, SOUL teachers will use assessment results to identify strengths and gaps, and tailor instruction to meet the needs of each student. Because MAP tracks individual student growth over time, it can help predict each student's level of proficiency and college readiness. MAP Interim Assessment data will be reviewed twice per year, and be included in mid and year-end student proficiency status reports. Interim Assessments data will measure by grade level student progress toward meeting grade-level standards. A baseline will be established during the 2018-2019 school year to determine reasonable and attainable grade level goals.

To address the curricular gap in math, SOUL will develop an integrated curriculum which incorporates Algebra I, Algebra II, and Geometry standards. All 11th grade students who have not passed algebra I at the beginning of their 11th grade year will be placed into an Integrated Math course to ensure that they will have been introduced to Algebra II standards prior to taking the CAASPP test. Moreover, this course will provide college-bound students with better preparation for post-secondary education by reinforcing previously learned standards in Algebra I and Geometry. Algebra II will be offered to all students who have completed Algebra I and Geometry prior by the end of their 10th grade year.

New Charter Academic Goal 2: Create greater student access to post-secondary opportunities by increasing SOUL's graduation rate.

CDE Graduation Rate

Nearly 95% of students who enroll at SOUL are credit deficient. More than two-thirds of all SOUL students are 11th and 12th graders, and 30% are ages 18 or over. Students are provided ample credit recovery opportunities, intervention resources, as well as academic and social/emotional

support while enrolled at SOUL and working towards graduation. For all seniors, credit recovery is critical to obtaining a high school diploma. In a comparative analysis of credits earned, student achievement was examined from the semester prior to a student enrolling at SOUL to their first semester enrolled at SOUL. It was found that once enrolled at SOUL students earn an average of 31 credits in their first semester versus an average of 13.7 credits in the last semester at their previous school.

The table below depicts SOUL's official State graduation rate, both the 4 year cohort and 5 year cohort for the past five years. Annual Yearly Progress data from the California Department of Education reveals that SOUL has met or exceeded its statewide graduation rate during the past five years. The table below reflects the available graduation rates through the 2015/2016 school year.

Grad Rate	2013	2014	2015	2016	2017
5Y Cohort	33%	44%	44%	41%	Not Available
4Y Cohort	33%	25%	20%	34%	Not Available

Table 19: SOUL's State graduation rates: 2013-2016 (Source: CDE)

Notwithstanding SOUL student increases in credits earned, students who graduate during their fifth or sixth year are not factored into the four-year cohort graduation rate, skewing the actual graduation percentages downward. Thus, the State cohort graduation rate is detrimental to alternative schools who serve fifth, sixth and seventh year seniors, since it does not accurately reflect the actual percentage of graduates. For this reason, the California Department of Education developed the five-year Year Cohort calculation for alternative schools, such as SOUL, which counts the additional graduates who are not in the 4 year cohort but complete credit requirements in their 5th year. Based on the 5 year cohort rate, SOUL met or exceeded the target graduation rate set by the State four years in a row, meeting the AYP Graduation Rate goal.

Internal Graduation Rate

In spite of the State's attempt to more accurately reflect graduation rates through the 5 year cohort calculation, it still fails to take into account the students who graduate in their 6th or 7th year of high school. Students can remain enrolled at SOUL until their 22nd birthday. Due to the fact that 30% SOUL's student population is 18 years old and older, and enroll credit deficient, there is a high number of 12th graders each year who will not be able to graduate within the school year. To more appropriately measure SOUL's graduation rate, an internal calculation was developed. Twelfth grade students who need 70 credits or fewer to complete graduation requirements are deemed "on track" to graduate. If a [twelfth-grade](#) student needs more than 70 credits to complete their 230 credit requirement, they are not counted in this calculation. The list of "on-track" twelfth graders is kept up to date as new students enroll. It is also adjusted at the beginning of the second semester based on the credits earned by the students during the first semester. At the beginning of second semester, it is expected that students will need 40 or fewer credits to still be considered "on track" to graduate. Any student initially on track to graduate upon enrolling at SOUL who becomes credit deficient during the second semester will be counted as a "non-grad" and will count against the internal graduation rate. Most students who are unable to complete their credit requirement by graduation choose to re-enroll during the summer or the following semester for graduation as a 5th or 6th year senior. In addition, those who were not considered "on-track" to graduate during the

given school year can re-enroll the following year. For example, during the 2016/2017 school year, of the 92 twelfth graders enrolled, only 53 were identified as “on-track” to graduate due to the number of credits needed to reach the 230 credit requirement. Of those 53 identified students, one dropped out. Of the remaining 52 students, 50 students successfully completed their credits for graduation. The remaining two students did not earn sufficient credits to graduate, and reenrolled for the 2017/2018 school year. Thus, SOUL’s internal graduation rate was 94%. The table below depicts an 8% increase in the internal graduation rate over the past 5 years.

Year	2013	2014	2015	2016	2017
12 th Grade Enrollment	102	107	100	107	92
“On-Track” to Graduate	44	40	34	52	53
Earned Diploma	38	36	32	49	50
Internal Grad Rate	86%	90%	93%	94%	94%

Table 20: SOUL’s Internal Graduation Rates: 2013-2016 (Source: SOUL Internal Records)

Additional data on the twelfth grade students who need more than 70 credits to graduate during the school year has not been recorded. Approximately 30% do continue their enrollment with SOUL, 25% transfer to an Adult School, and the others withdraw from SOUL for a variety of reasons.

SOUL’s internal graduation rate is used in shaping SOUL’s program in two ways. First, the internal rate provides SOUL an accurate measure the number of students on track to graduate at the beginning of their final year of high school. Second, it is important to monitor these students, who would otherwise have not completed high school and are not counted in any other graduation rate.

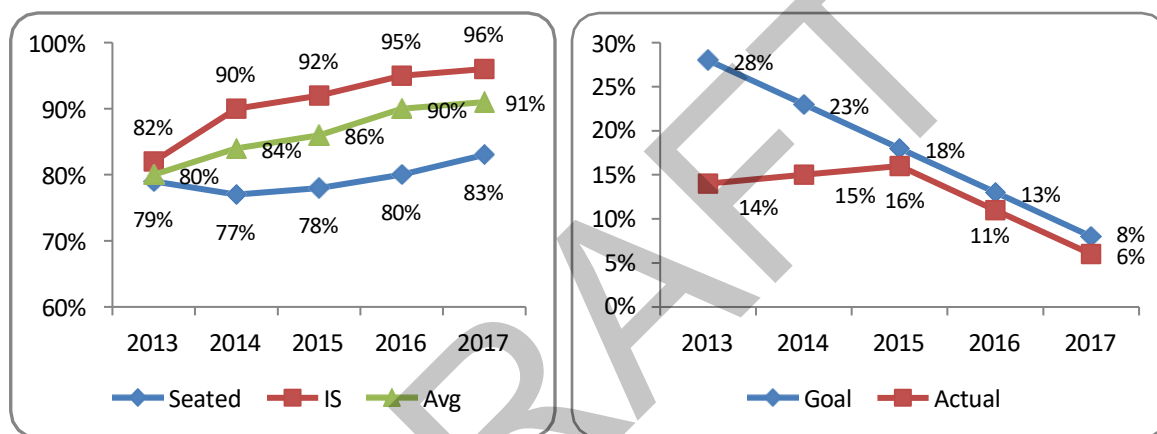
SOUL remains committed to providing alternative educational resources to all credit-deficient 12th graders to allow these potential dropouts a viable opportunity to obtain a high school diploma and prepare them for post-secondary options. In order to accurately measure this goal, the alternative internal graduation rate formula for SOUL has been retained in the new charter petition. Further monitoring of the 12th grade students not on track to graduate will also be considered in an effort to understand the services needed to retain the enrollment of all students to earn a diploma.

New Charter Schoolwide Goal 1: Increase student connectedness and motivation for academic success during and beyond high school through increased student attendance and greater exposure to career education opportunities.

Notwithstanding recent gains in student participation in co-curricular and extra-curricular activities such as sports and leadership groups, SOUL continues to struggle with lower than ADA to enrollment average. Similarly, students who enroll at SOUL have a higher than average history of suspensions from their previous schools. A majority of SOUL students are considered at risk of dropping out of school due to past history of truancy, behavior issues, and poor academic achievement.

Student Attendance and Suspension Rates

To demonstrate increased student connectedness and motivation, SOUL set as an annual schoolwide goal an increased attendance rate in both the classroom-based and Independent Study programs. During the 2011/2012 school year, the average daily attendance rate was 85% for the classroom-based program and 80% for the Independent Study program. Each year for a five-year period ending June 2018, SOUL set as a goal a 90% schoolwide attendance rate. As depicted in the graph below, since the 2012/2013 school year, SOUL's classroom based attendance to enrollment has experienced a four percent increase, up from 79% in 2013 to 83% in 2017. With respect to Independent Study attendance, the percentage of students attending versus total enrollment has experienced a significant 14% increase over the past five years. Overall, schoolwide attendance as compared to enrollment averages have increased by 11% over the past five years, from 80% in 2013 to 91% in 2017.



Graph 1. [Soul Attendance](#) Rate by Program 2013-2017 (Source: SOUL ADA)

Graph 2: SOUL Suspension Rate Percentages: 2013-2017 (Source: CDE)

Consistent with data from SOUL's 2010/2011 School Accountability Report Card, 33% of all SOUL classroom-based students had been suspended one or more times during the school year. SOUL set out to reduce suspensions by five percentage points each year for a five-year period. As depicted in Graph 2 below, SOUL's suspension rate has decreased steadily for the past three years. The implementation of a Restorative Justice Discipline model initiated in 2014 has resulted in decreased suspensions and an increase in alternatives to suspensions, such as mandatory parent/student counseling and parent meetings. As depicted in the graph above, SOUL has drastically reduced its percentage of suspended students from 33% in the Baseline Year to 6% during the 2016/2017 school year. The School of Unlimited Learning works to provide positive corrective measures through its In-school Suspension Community Service Program. Prior to the implementation of more serious disciplinary actions, students are given the opportunity to perform community service as a disciplinary course of action that results in positive community interaction.

It is important to keep in mind that many of the students who enroll at SOUL have had a prior history of defiance and disruption at their previous schools. Some have been expelled from

traditional schools and/or previously incarcerated for offenses such as fighting, theft, possession of illegal substances and weapons, and gang activity.

For the past two years, SOUL has contracted with a local counseling center to provide Success for Life Training to SOUL students. Students and staff meet weekly in a group setting, and in addition, individual coaching sessions are available upon request. Through the year, students and staff learn the power of creating a life vision and explore the dynamics of the action steps necessary to translate vision into action. Students and staff build partnerships with one another while students practice goal-setting by imagining their lives in the short term and begin to build the foundation for their future. The support of partnerships is invaluable for success. Learning how to work as a team helps with developing social skills and communication skills, and has proven to have a positive impact ~~in the classroom~~ on students. The implementation of the Success for Life Program has strongly correlated with a decrease in suspensions.

Expulsions

A student can be expelled for a serious offense or for a series of infractions that are detrimental to the order of the school. Students of the School of Unlimited Learning may be expelled from the charter school for persistent non-compliance with the terms of this charter or the rules, procedures, and policies outlined in the SOUL parent/student handbook.

Most students who violate SOUL's Zero Tolerance Policy may choose to withdraw and transfer to another school in lieu of going through the expulsion process. Thus, SOUL has expelled only two students in the past twenty years. In the case of a serious or violent violation, the expulsion process is non-negotiable.

Career Education Opportunities

If students are to succeed beyond high school, they must see the value in continuing their education, as well as possess the knowledge of career choices for the future. Over the past three years, SOUL has made strides with respect to preparing students to become viable participants in a developing workforce. SOUL students ages 16 and over are offered the opportunity to participate in courses that allow them to explore potential careers. In 2014, SOUL developed a partnership with Bitwise Corporation to incorporate a Coding/Computer Literacy course and formed a partnership with Central California Legal Services which provides students exposure to careers in the legal profession through the Street Law and Mock Trial programs. During the 2015-2016 school year, SOUL expanded its career courses to more actively engage students by providing them access to career training. New courses consisted of website development and video production. SOUL's Youth Mentoring Program, which is part of the Child Care Career Pathway, provides internship hours, a stipend, and scholarship opportunities to students completing the program.

During the 2016/2017 school year, SOUL entered into a partnership with Ideaworks, a neighborhood non-profit trade organization, to provide an innovative, hands-on experience for students in the areas of woodworking, blacksmithing, welding, glass-blowing, ceramics and 3D printing. With a focus on safety, skills, and process, Ideaworks has set a strong foundation in these

trades. It has allowed students to explore and refine their abilities in these potential career areas while earning elective credits toward their high school diploma.

In addition to the numerous extra-curricular opportunities provided at SOUL, there are a variety of co-curricular options that offer students the opportunity to explore skills and interests that could potentially lead to future employment and career choices. Currently, SOUL offers the following programs during afternoon block classes:

- Youth Mentoring—through a partnership with Fresno EOC’s Early Head Start/Head Start Program, students are trained and placed in childcare centers as teacher aides for infants and toddlers.
- Street Law—through a partnership with Central California Legal Services, students are exposed to a variety of careers in the criminal justice system.
- Video Production— through a partnership with CMAC, students create and broadcast monthly videos highlighting school-related events.
- Music—Students are given the opportunity to learn and explore their creativity on guitar, keyboards, drums, and singing as well as stage, sound and lighting.
- Computer Literacy and Graphic Design—Through a partnership with Quiqlabs, students learn basic computer literacy and are exposed to beginning coding skills and basic graphic design.

Since 2014, SOUL has begun aligning its program with the efforts of other Fresno EOC programs in a collaborative fashion aimed at workforce preparation opportunities for SOUL students. During the 2015/2016 school year, over 15 percent of SOUL students participated in the All Youth, One System program through Fresno EOC’s Employment and Training program. Fresno EOC offers paid internships to college-bound SOUL graduates through its Graduate Work Study Program. During the summer of 2017, the paid summer internship program was extended to ten SOUL undergraduates, allowing them to gain invaluable paid work experience to better prepare them for their senior year and beyond. Fresno EOC’s Strategic Initiative for Education recognizes that through collaboration, SOUL can advance quality education and training to empower students and their families. Likewise, Fresno EOC’s Strategic Initiative for Job Readiness calls for collaboration to create an alternative education environment that prepares individuals with job skills for careers aligned with market demands. SOUL’s expanding Career Academy has increased job readiness skills to high school youth by actively engaging them in career preparation and training.

New Charter Schoolwide Goal 2: Increase student success through active parent participation, involvement, and engagement.

SOUL’s revised charter goal calls for increased parent participation, especially among parents of Independent Study students. Typically, parents of at-risk high-school age students do not actively participate in their child’s school activities. In alignment with the school’s Local Control Accountability Plan, SOUL has developed an annual parent involvement plan which encourages parents to attend scheduled meetings and activities throughout the year. Parent attendance data collected from parent meetings, counselor meetings, and schoolwide events in which parents are

requested to attend reveal a high percentage of parents who do not attend school functions, despite frequent parent contact by teachers and staff, as well as occasional home visits.

Parent meetings are scheduled as reflected in SOUL's annual parent involvement plan. A greater percentage of parents participate in scheduled meetings with counselors and case managers throughout the year. Since 2012, 100% of all parents have attended at least one meeting during the school year, since it is mandatory for parents and students to attend an initial orientation upon enrollment. The 2015/2016 parent survey results revealed that parents want increased communication between home and school. This does not mean attending meetings five or six times a year; rather, they want ongoing communication from all school staff, including teachers, on their child's progress.

Home to school communication in both programs is a priority. With the adoption of School Pathways as our Student Information System, parents now have the opportunity to access their child's grades and attendance online. There has been a significant increase in parent contact and dialog between school and parents through the mandatory orientation prior to enrollment. SOUL continues to have more parent attendance at Parent Meetings that are held on a quarterly basis, rather than relying on a group of parents to organize and sustain a PTSA committee. SOUL takes pride in having 100% face to face contact with every parent, as well as hosting school events with up to 60% of parents in attendance. SOUL parents also serve on SOUL's Governing Council and there is a continuous effort to recruit interested parents and alumni parents to serve as representatives on the council.

~~While parent contact has increased for the students in the classroom-based program,~~ SOUL continues to seek ways to increase involvement and participation in regards to the parents of Independent Study students. Despite increased enrollment of Independent Study students, parent participation continues to be marginal at best. A further examination has revealed that Independent Study students are often engaged in additional activities, such as work, raising a child, or caring for an elderly family member. The flexibility of independent studies accomodates their schedule, however the parents do not regard their children as "full-time" students and therefore do not consider their role as a parent to be crucial to their child's academic success. Instead, they perform minimal duties such as reviewing their child's homework and signing off on the required paperwork so that their child successfully completes the program. SOUL makes every effort to include parents of Independent Study students. Despite our efforts, we have not made any significant impact in getting the parents of Independent Study parents to attend school meetings.

Notwithstanding the lack of participation among parents of Independent Study Students at scheduled parent meetings, there has been a significant increase of parent contacts and dialog between school and Independent Study parents. School support services are readily available to Independent Study students and their parents. Crucial services such as tutoring, career counseling, mental health counseling, and referrals to Fresno EOC and outside agencies for a variety of services are available and encouraged. Beginning in 2017, SOUL's Success for Life Coach began meeting with parents as part of SOUL's parent outreach services. This resource will be expanded in the coming years.

SOUL will continue to explore and implement strategies to increase communication with parents of Independent Study students, either in small groups or in larger parent meetings. The addition of mandatory parent/student counseling sessions throughout the year has not only increased parent involvement, but has also resulted in more positive student behavior. In addition to the efforts by the Truancy Prevention/Parent Liaison, SOUL case managers worked closely with the Guidance Dean to hold meetings with parents whose students were at risk of being removed from the program.

During the 2016/2017 school year, 100% of all parents/guardians of SOUL students attended at least one meeting throughout the year. For the 2017/2018 school all subsequent years, 100% of parents/guardians of all SOUL students will have attended one or more parent meetings.

Parents are surveyed in the fall and at the beginning of the second semester. The mid-year survey is due to the increased number of new students that SOUL receives at the beginning of the 2nd semester. The parent surveys focus on parent expectations and provide parent input as to how to increase parent engagement. The surveys provide valuable data to the school in terms of the resources parents need to help their child successfully graduate from high school.

Summary

As stated in the analysis and evaluation of each of the four goals, SOUL will collect, analyze, utilize and report student and school performance data as outlined in each of the goal sections above. SOUL will share performance data with all its stakeholders-parents, students, teachers, members of the Governing Council, and the community.

New Charter Goals 2018- 2023

Pupil Outcomes		Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)																					
Academic Goal One																										
Improve Student Academic Performance and College and Career Readiness by Increasing Reading and Math Levels of all SOUL Students.		CAASPP Language Arts and Assessments (Grade 11)	Annual	Annual increase in CAASPP of 3% percentage points of students meeting or exceeding standard in ELA and	CAASPP ELA and Math																					
		NWEA Measures of Academic Progress (MAP) Interim Assessments			<table><tr><td></td><td>ELA</td><td>Math</td></tr><tr><td>Base</td><td>16%</td><td>2%</td></tr><tr><td>2019</td><td>19%</td><td>5%</td></tr><tr><td>2020</td><td>22%</td><td>8%</td></tr><tr><td>2021</td><td>25%</td><td>11%</td></tr><tr><td>2022</td><td>28%</td><td>14%</td></tr><tr><td>2023</td><td>31%</td><td>17%</td></tr></table>		ELA	Math	Base	16%	2%	2019	19%	5%	2020	22%	8%	2021	25%	11%	2022	28%	14%	2023	31%	17%
	ELA	Math																								
Base	16%	2%																								
2019	19%	5%																								
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2021	25%	11%																								
2022	28%	14%																								
2023	31%	17%																								
		Edmentum Accucess Pre and Post Tests (Grades 9-12)		A minimum of 3% annual increase of students meeting or exceeding grade level in reading and math.	Edmentum Accucess Reading and Math																					
					<table><tr><td></td><td>Acc. Read</td><td>Acc. Math</td></tr><tr><td>Base</td><td>60%</td><td>49%</td></tr><tr><td>2019</td><td>63%</td><td>52%</td></tr><tr><td>2020</td><td>66%</td><td>55%</td></tr><tr><td>2021</td><td>69%</td><td>58%</td></tr><tr><td>2022</td><td>72%</td><td>61%</td></tr><tr><td>2023</td><td>75%</td><td>64%</td></tr></table>		Acc. Read	Acc. Math	Base	60%	49%	2019	63%	52%	2020	66%	55%	2021	69%	58%	2022	72%	61%	2023	75%	64%
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Pupil Outcomes		Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)																														
Academic Goal Two																																			
Create Greater Student Access to Post-Secondary Opportunities by Increasing School Graduation Rate		CDE Annual Minimum Graduation Rate CDE Cohort Dropout Rate School Internal graduation Rate	Annual	Meet or Exceed Target School Graduation Rate set by State of California for five years, ending June 2023 Meet or Exceed Internal Graduation Rate of 95% or above for five years, ending June 2023	<table><tr><td></td><td>CDE Grad Rate</td><td>Internal Grad Rate</td></tr><tr><td>2019</td><td>Meet or Exceed Target</td><td>95% or above</td></tr><tr><td>2020</td><td>Meet or Exceed Target</td><td>95% or above</td></tr><tr><td>2021</td><td>Meet or Exceed Target</td><td>95% or above</td></tr><tr><td>2022</td><td>Meet or Exceed Target</td><td>95% or above</td></tr><tr><td>2023</td><td>Meet or Exceed Target</td><td>95% or above</td></tr></table>		CDE Grad Rate	Internal Grad Rate	2019	Meet or Exceed Target	95% or above	2020	Meet or Exceed Target	95% or above	2021	Meet or Exceed Target	95% or above	2022	Meet or Exceed Target	95% or above	2023	Meet or Exceed Target	95% or above												
	CDE Grad Rate	Internal Grad Rate																																	
2019	Meet or Exceed Target	95% or above																																	
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Pupil Outcomes		Assessment Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)																														
Schoolwide Goal One																																			
SOUL students will demonstrate increased connectedness and motivation for academic success during and beyond their high school experience through increased attendance, higher engagement, and greater exposure to career education opportunities.		ADA To Enrollment SARC Suspension Rate SARC Expulsion Rate Career Education Courses	Annual	Maintain an Annual 92% ADA to Enrollment Rate Decrease the Annual SARC Suspension Rate to 6% or below. Annual SARC Expulsion Rate less than 2% each year At last 50% of all SOUL students will take a CTE course in their 11 th and 12 th grade each year.	<table><tr><td></td><td>ADA to Enroll</td><td>Annual Suspend Rate</td><td>Annual Expel Rate</td><td>Students Enrolled in CTE Courses</td></tr><tr><td>2019</td><td>92% or above</td><td>6% or below</td><td><2%</td><td>50%</td></tr><tr><td>2020</td><td>92% or above</td><td>6% or below</td><td><2%</td><td>50%</td></tr><tr><td>2021</td><td>92% or above</td><td>6% or below</td><td><2%</td><td>50%</td></tr><tr><td>2022</td><td>92% or above</td><td>6% or below</td><td><2%</td><td>50%</td></tr><tr><td>2023</td><td>92% or above</td><td>6% or below</td><td><2%</td><td>50%</td></tr></table>		ADA to Enroll	Annual Suspend Rate	Annual Expel Rate	Students Enrolled in CTE Courses	2019	92% or above	6% or below	<2%	50%	2020	92% or above	6% or below	<2%	50%	2021	92% or above	6% or below	<2%	50%	2022	92% or above	6% or below	<2%	50%	2023	92% or above	6% or below	<2%	50%
	ADA to Enroll	Annual Suspend Rate	Annual Expel Rate	Students Enrolled in CTE Courses																															
2019	92% or above	6% or below	<2%	50%																															
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2021	92% or above	6% or below	<2%	50%																															
2022	92% or above	6% or below	<2%	50%																															
2023	92% or above	6% or below	<2%	50%																															

Pupil Outcomes	Assessments Used	Frequency	Proficiency Goal/Exit Outcomes	Periodic Progress Targets (annually)		
Schoolwide Goal Two						
Increase Student Success through Active Parent Participation, Involvement, and Engagement	Parent Meeting Attendance	Annually	100% of Parents to Attend Two or More Meetings per Year		Parent Attendance- 2 or more meetings per year	Parent Satisfaction Survey
				2019	100%	80% Satisfaction – all subgroups
	Bilingual Advisory Meeting Attendance	Monthly	Bilingual Advisory Committee to meet 6 times per year.	2020	100%	80% Satisfaction – all subgroups
				2021	100%	80% Satisfaction – all subgroups
	Parent Survey	Three times per year	Parents Surveyed three times per year	2022	100%	80% Satisfaction – all subgroups
				2023	100%	80% Satisfaction – all subgroups

Table 21: Proposed Pupil Outcome Table: 2018-2023

Element C: Methods to Assess Pupil Progress Toward Outcomes

"The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card. Education Code Section 47605(~~cb~~)(5)(C)."

The School of Unlimited Learning affirms that its exit outcomes will align to its mission, curriculum, and assessments.

For purposes of this material revision, insofar as the law has changed related to the Charter School's methods of measurement and assessment requirements, pursuant to Education Code Section 47605(c)(5)(C), a reasonably comprehensive description of the Charter School's operative methods of measurement can be found in the Charter School's LCAP and School Accountability Report Card ("SARC"). The current LCAP is on file with the District and the current SARC is on file with the CDE.

Measurable Pupil Outcomes and Learning Goals

This new petition provides a detailed description of SOUL's revised goals, which include annual data analysis, review, and submission of an annual comprehensive report to Fresno EOC Board of Commissioners. Furthermore, each goal bears its own set of performance enhancing tools. These mechanisms allow for consistent monitoring of student academic progress, as well as an effective data-driven approach to decision making regarding curriculum, instruction, and assessment of student performance.

New Charter Academic Goal 1: Improve student academic performance and college and career readiness by increasing reading and math levels of all SOUL students.

LCAP priorities addressed in Academic Goal 1: 2 (Implementation of State Standards); 4 (Pupil Achievement); 7 (Course Access); and 8 (Pupil Outcomes).

Expected Schoolwide Learning Results addressed Academic Goal 1: Academic Achievers, Critical Thinkers and Problem Solvers, Effective Communicators.

Consistent with priorities 2, 4, 7, and 8 of SOUL's LCAP and Goal 1 of SOUL's WASC Action Plan, SOUL will continue to assess student achievement goals to ensure that curriculum and instruction are aligned to student needs, and that all programs are fully supported, staffed, monitored, and evaluated. The school will refine its Common Core curriculum and instructional delivery through an annual professional development plan. All SOUL teachers will continue to receive professional development in Common Core training on an annual basis to ensure that their lessons fully incorporate core, literacy, and ELD standards. All students, including EL students and students with special needs, will have full access to core, literacy, and ELD standards.

Method of Measurement

SOUL will increase the percentage of students meeting or exceeding grade level to 75% in reading and 64% in math by the five-year period ending June 2023 for all subgroups. The 2016/2017 Accuaccess results in reading and math will serve as a baseline for growth for the next five-year period of the charter.

Metrics/ Indicators	2018-19	2019-2020	2020-2021	2021-2022	2022-2023
Accuaccess Reading	63% for all subgroups	66% for all subgroups	69% for all subgroups	72% for all subgroups	75% for all subgroups
Accuaccess Math	52% for all subgroups	55% for all subgroups	58% for all subgroups	61% for all subgroups	64% for all subgroups

Table 1: Projected growth in reading and math percentages 2019-2023

SOUL's CAASPP 2017 ELA and Math results will be used as a baseline to determine growth in ELA and Math for the next five-year period. As depicted in the table below, in an effort to close the proficiency gap, the percentage of students meeting or exceeding the standard at SOUL will increase to 27% in ELA and 17% in Math each year for the five-year period ending 2023. This goal applies schoolwide and to all measurable subgroups.

Metrics/ Indicators	2018-19	2019-2020	2020-2021	2021-2022	2022-2023
CAASPP Language Arts	19% will meet or exceed ELA standard	21% will meet or exceed ELA standard	23% will meet or exceed ELA standard	25% will meet or exceed ELA standard	27% will meet or exceed ELA standard
CAASPP Math	5% will meet or exceed Math standard	8% will meet or exceed Math standard	11% will meet or exceed Math standard	14% will meet or exceed Math standard	17% will meet or exceed Math standard

Table 2: Projected growth in CAASPP ELA and Math Achievement Levels for 2019-2023

Data Analysis and Evaluation

Student performance data will be collected, analyzed and reported each year to SOUL's stakeholder groups, including SOUL staff, the SOUL Governing Council, students, parents, and the Fresno EOC Board of Commissioners. The annual report will measure and depict actual performance rates compared to goals. Intervention strategies will be implemented to increase student achievement if goals are not met.

New Charter Academic Goal 2: Create greater student access to post-secondary opportunities by increasing SOUL's graduation rate.

LCAP priorities addressed in Academic Goal 2: 2 (Implementation of State Standards); 7 (Course Access); and 8 (Pupil Outcomes).

Expected Schoolwide Learning Results addressed in Academic Goal 2: Self-Directed Lifelong Learners, Responsible and Productive Citizens, Information Processors.

SOUL's Academic Goal 2 of increasing the school's graduation rate is in alignment with 2, 7, and 8 of SOUL's Local Control Accountability Plan (LCAP, and address) and Goal 2 of SOUL's WASC Action Plan.

Method of Measurement

Each year for a five-year period ending June 2023, SOUL's graduation rate will meet or exceed SOUL's California cohort graduation rate goal set by the California Department of Education. SOUL's Internal Graduation Rate will meet or exceed 95% each year for the five year period ending June 2023.

Metrics/Indicators	Baseline	2018-19	2019-20	2020-21	2021-22	2022-23
State of California Annual Minimum Graduation Rate for School	School Graduation Rate set by State of California	Meet or Exceed Target School Graduation Rate set by State of California	Meet or Exceed Target School Graduation Rate set by State of California	Meet or Exceed Target School Graduation Rate set by State of California	Meet or Exceed Target School Graduation Rate set by State of California	Meet or Exceed Target School Graduation Rate set by State of California
School Internal Graduation Rate	94%	95% for all subgroups	95% for all subgroups	95% for all subgroups	95% for all subgroups	95% for all subgroups

Table 3: Projected CDE Cohort and Internal Graduation rate goals for 2019-2023

Data Analysis and Evaluation

SOUL will continue to use an internal graduation rate calculation which more appropriately reflects SOUL's graduation rate. Seniors who are "on track" to graduate will be identified by SOUL's guidance counselor at the beginning of each school year. This list will be kept up to date as new students enroll. Students are considered on track for graduation if they need 70 or fewer credits to complete the 230-credit graduation requirement by the end of the school year. This list is kept up to date as new twelfth graders enroll and is adjusted at the beginning of second semester depending on the credits earned by the students during the first semester. At the beginning of the second semester, it is expected that students will need 40 or fewer credits to still be considered on track to graduate. Any student initially on track to graduate upon enrolling at SOUL and who becomes credit deficient in the second semester will be counted as a "non-completer". Data will be collected and reported each year. Findings will be reviewed with SOUL staff, the SOUL Governing Council and the Fresno EOC Board of Commissioners in an annual progress report.

New Charter Schoolwide Goal 1: Increase student connectedness and motivation for academic success during and beyond high school through increased student attendance and greater exposure to career education opportunities.

LCAP priorities addressed in Schoolwide Goal 1: 4 (Pupil Achievement); 5 (Pupil Engagement); 6 (School Climate); and 8 (Pupil Outcomes).

Expected Schoolwide Learning Results Addressed: Self-Directed Lifelong Learners, Responsible and Productive Citizens, and Information Processors.

SOUL's Schoolwide Goal 1, which addresses student connection and motivation through greater attendance and increased access to career education, is in alignment with priorities 4, 5, 6, and 8 of SOUL's Local Control Accountability Plan, and Goal 3 of SOUL's WASC Action Plan.

Method of Measurement

SOUL's 2016/2017 annual ADA to enrollment was 91%, representing an increase of two percent over the previous year. Using the 2016/2017 annual enrollment and ADA data as a baseline, combined student average daily attendance compared to enrollment in both the classroom-based and independent study program will meet or exceed the annual target goal of 92% ADA to total enrollment. The suspension rate reported in the School Climate Report of SOUL's School Accountability Report Card for the 2016/2017 school year was 6%. Using the 6% suspension rate as a baseline, SOUL will set a suspension-rate goal of 6% or less each year for the five-year period ending June 2023. The expulsion rate reported in the School Climate Report of SOUL's School Accountability Report Card for the 2016/2017 school year was zero. The annual target expulsion rate will be less than 2%.

Metrics/Indicators	Baseline	2018-19	2019-20	2020-21	2021-22	2022-23
ADA to Enrollment	90%	92% for all subgroups	92% for all subgroups	92% for all subgroups	92% for all subgroups	92% for all subgroups
Suspension Rate	6%	<6%	<6%	<6%	<6%	<6%
Expulsion Rate	<2%	<2%	<2%	<2%	<2%	<2%

Table 4: Projected Attendance, Suspension and Expulsion Rates, 2019-2023

SOUL will maintain its annual goal that 100% of all SOUL graduating seniors ~~from both classroom and independent study programs~~ will have completed a career assessment. Over the past three years, SOUL has made strides with respect to preparing students to become viable participants in a developing workforce. SOUL will continue to offer 11th and 12th grade students the opportunity to participate in courses that allow them to explore potential careers.

Metrics/ Indicators	Baseline	2018-19	2019-20	2020-21	2021-22	2022-23
11 th and 12 th Grade Student Enrollment in Career Education Courses	45%	50%	50%	50%	50%	50%
Seniors who Complete a Career Assessment	100%	100%	100%	100%	100%	100%

Table 5: Goals for Student Enrollment in CTE Courses and Career Assessment Completion 2019-2023.

Data Analysis and Evaluation

As reflected in the school's Local Control Accountability Plan and WASC Action Plan goals for 2017/2018, SOUL will collect, analyze, and evaluate student discipline and attendance data on an annual basis and make recommendations for program changes to improve attendance and decrease suspensions. Each year, SOUL will collect and report the percentage of students enrolled in CTE courses, as well as the percentage of graduating seniors who complete a career assessment.

New Charter Schoolwide Goal 2: Increase student success through active parent participation, involvement, and engagement.

LCAP priorities addressed in Schoolwide Goal 2: 3 (Parental Involvement); 4 (Pupil Achievement); 5 (Pupil Engagement); 6 (School Climate); and 8 (Pupil Outcomes).

Expected Schoolwide Learning Results addressed: Responsible and Productive Citizens, Self-Directed Life-long learners, Critical thinkers and Problem Solvers, Effective Communicators.

SOUL's revised charter goal calls for increased parent participation, especially among parents of independent study students. SOUL's Schoolwide Goal 2, is in alignment with priorities 3, 4, 5, 6, and 8 of SOUL's Local Control Accountability Plan, and Goal 4 of SOUL's WASC Action Plan.

Typically, parents of at-risk-promise high-school age students do not actively participate in their child's school activities. In alignment with the school's Local Control Accountability Plan, SOUL has developed an annual parent involvement plan which encourages parents to attend scheduled meetings and activities throughout the year. Parent attendance data collected from parent meetings, counselor meetings, and schoolwide events in which parents are requested to attend reveal a high percentage of parents who do not attend school functions, despite frequent parent contact by teachers and staff, as well as occasional home visits.

Parent meetings are scheduled as reflected in SOUL's annual parent involvement plan. A greater percentage of parents participate in scheduled individual meetings with counselors and case managers throughout the year than schoolwide parent meetings and activities. Since 2012, 100% of all parents have attended at least one meeting during the school year, as it is mandatory for parents and students to attend an initial orientation upon enrollment. The 2017/2018 parent survey results revealed that parents want increased communication between home and school. This does not mean attending meetings five or six times a year; rather, they want ongoing communication from all school staff, especially teachers, on their child's progress.

Method of Measurement

During the 2016/2017 school year, 100% of all parents/guardians of SOUL students attended at least one meeting throughout the year. For the 2017/2018 school year all subsequent years of this charter petition, 100% of parents/guardians of all SOUL students will attend one or more parent meetings. Parents are surveyed in the fall and at the beginning of the second semester.

The mid-year survey is due to the increased number of new students that SOUL receives at the beginning of the 2nd semester. The parent surveys focus on parent expectations and provide parent input as to how to increase parent engagement. The surveys provide valuable data to the school in terms of the resources parents need to help their child successfully graduate from high school.

Metrics /Indicators	Baseline	2018-19	2019-20	2020-21	2021-22	2022-23
Parent Meeting Attendance	100% for all subgroups	100% for all subgroups	100% for all subgroups	100% for all subgroups	100% for all subgroups	100% for all subgroups
Parent Survey	80% satisfaction for all subgroups	80% Satisfaction for all subgroups	80% satisfaction for all subgroups	80% satisfaction for all subgroups	80% satisfaction for all subgroups	80% satisfaction for all subgroups

Table 6: Goals for Parent Attendance and Parent Satisfaction: 2019-2023

Data Analysis and Evaluation

Data of parent participation will be collected through case manager logs of parent orientations, sign-in sheets from parent meetings, and logs of meetings by all school personnel, including school counselors, case managers, teachers, the principal and guidance dean, and the Success for Life coach. Parent survey data will be collected, analyzed, and reported on a semi-annual basis. The overall parent satisfaction rate, as determined by the survey, will be set at 80% or above each year for the five-year charter period.

Summary

As stated in the analysis and evaluation of each of the four goals, SOUL will collect, analyze, utilize and report student and school performance data as outlined in each of the new charter academic and schoolwide goals. SOUL will share performance data with all its stakeholders-parents, students, teachers, members of the Governing Council, and the community through mid-year and year-end status reports.

Element D: School Governance

"The governance structure of the [charter](#) school, including, but not limited to, the process to be followed [by the charter school](#) to ensure parental involvement." California Education Code Section 47605(~~bc~~)(5)(D).

Fresno EOC, founded in 1965, is a 501(c).3 non-profit organization, and is one of the nation's largest Community Action agencies. Fresno EOC's Board of Commissioners provides ultimate oversight of the School of Unlimited Learning.

The Fresno County EOC Board of Commissioners meets on the fourth Wednesday of each month except for July and August. All meetings are conducted in accordance with and pursuant to the Ralph M. Brown Act, Education Code Section 47604.1(c), and other applicable open meeting laws.

[The Charter School has adopted a Conflict of Interest Code that complies with the Political Reform Act, Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1, and Corporations Code conflict of interest rules, and which shall be updated with any charter school-specific conflict of interest laws or regulations. As required, the Conflict of Interest Code has been submitted to the County Board of Supervisors for approval.](#)

[Commencing July 1, 2023, and each year thereafter, upon receipt of a petition for student representation that meets the requirements of Education Code Section 47604.2\(b\)\(2\), the Board shall order the inclusion within its membership, in addition to the number of members otherwise prescribed, of at least one student member. A student member of the Board shall have preferential voting rights as defined in Education Code Section 47604.2\(b\)\(4\).](#)

School Site Governing Council

The Governing Council, which also serves as the SOUL's School Site Council is an advisory council which regularly reviews all school operational, programmatic, and fiscal matters, and Council recommendations to the Fresno EOC Board of Commissioners for final approval. The SOUL Governing Council serves as an advisory council, and consists of 15 to 21 members. The Governing Council is comprised of representatives from the following interest groups and organizations

- Parents, students, and staff participating in the School of Unlimited Learning.
- Advisory board members or administrators from Fresno EOC programs focused on children and youth.
- At least one member of the Fresno EOC Board of Commissioners.
- Educators or administrators from Fresno Unified School District, Fresno County Office of Education, Fresno City College, and other school districts in Fresno County with a substantial interest in student achievement.
- Educators, administrators, researchers from public and private universities, with a significant interest in student achievement, school-to-career articulation, or education reform.
- Business and industry employers who are committed to developing a qualified workforce.
- Public officials, volunteers, mentors, or other members of the community with an exemplary interest in student success.

~~Any conflict of interest identified by a council member is resolved through ascertaining the degree of conflict and formulating a resolution acceptable to the Governing Council.~~

The Governing Council is responsible for reviewing the fiscal and programmatic policies and operations of the School of Unlimited Learning and for providing reports and recommendations to the Fresno EOC Board of Commissioners, which retains legal responsibility for the fiscal and programmatic operations of the School of Unlimited Learning.

The Governing Council meets on the second Tuesday of each month from September through May.

School Structure and Organization

The School of Unlimited Learning operates its school year program using the traditional track school calendar of Fresno Unified School District, with the option for students to attend additional summer school days. ~~Separate attendance is recorded and reported for SOUL's classroom-based and Independent Study programs.~~

Parental Involvement:

Parent involvement is essential to student success. Effectively engaging parents in the education of their children has the potential of reforming public education. Parents/guardians are encouraged to participate in the education of their child through a variety of avenues.

In accordance with Federal Title 1 requirements, the School of Unlimited Learning has developed a written Parent Involvement Policy, which describes how SOUL involves parents to improve student academic achievement and school performance. The Parent Involvement Policy includes a variety of ways that parents can become actively involved in their child's educational experience at SOUL. The Parent Involvement Policy is designed to help build the school's and parents' capacity for increased parent involvement. In the spring of each year, SOUL conducts an annual review of the content and effectiveness of the parent involvement policy and uses the findings of the evaluation to design more effective opportunities for parental involvement to increase student academic success.

Parent involvement is crucial to the development of school improvement. Throughout the year, there are several opportunities for parent participation. Regularly scheduled parent meetings, schoolwide assemblies, and Student Study Teams are many of the ways that parents can participate regularly with the school. SOUL makes a concentrated effort to maximize parent involvement, especially parents of EL students.

Parent Involvement Goals

- Parents play a crucial role in the joint development of a plan for continuous school improvement.
- Positive working relationship exists between educators and parents.
- Close communication exists between school and home.
- Strong parent involvement is evident through attendance and participation at school-sponsored events.
- Parents are viewed as a vital component to the academic success of their students.

Rights of Parents

- To expect that their child spends time at school in a safe, wholesome, stimulating atmosphere engaged in productive activity under the care and direction of a dedicated staff.
- To be assured that school personnel at no time preempts parental prerogative.
- To be informed of district policy, school rules, and regulations.
- To review their child's records with a certificated staff member.
- At the beginning of each academic year, schools receiving Title 1 funds must inform parents of their right to request information regarding the professional qualifications of their child's teacher. Also, any school that has been identified for Program Improvement or Corrective Action must promptly notify parents regarding an explanation of the identification as well as other requirements specified in the Act.

Responsibilities of Parents

- To visit the school periodically to participate in conferences with teachers, counselors, or administrators regarding the academic, attendance and behavioral status of their child.
- To support their child by ensuring that he/she receives adequate sleep, nutrition, and appropriate clothing before coming to school.
- To apply and maintain consistent and adequate restraints in regards to their child's overall behavior and to approve of reasonable behavioral guidelines as applied by school personnel.
- To cooperate with the school in bringing about improvements designed to enhance the educational program offered students.
- To provide the school with current information regarding legal address, phone, medical data, and other facts, which may help the school to serve their child.

Parent Involvement Opportunities

SOUL Governing Council

Parent involvement is essential to the success of the School of Unlimited Learning. Parent and student representatives are asked to participate in the School Site Governing Council.

SOUL Parent Advisory Meetings

Parent meetings are held regularly throughout the year. The meeting time and date is determined by the parents completing a questionnaire when enrolling their child or at Back to School Night in September. The meetings focus on information pertinent to parents, such as school improvement efforts, mandated testing, school policies and procedures, etc.

Communication

Parents are kept abreast of school activities, events, and the educational progress of their child. The student's case manager, teachers, school administration, and counseling staff initiate contact with parents through phone, mail, email, and/or personal visits. Communication between

the school and home is regular and meaningful thus providing a foundation of trust and collaboration. As parents and educators successfully correspond, problems are more readily resolved and students make greater academic progress.

Learning

Parents have active participation in selecting placement options with their child. Regular attendance, providing basic clothing and supplies, assisting with homework, and taking a personal interest in the academic advancement of their child are strongly encouraged. Emphasis is given to the family in becoming the primary accountability structure for the success of their student.

Volunteering

Parents can help the school through assisting in [Charter School](#) ~~the classroom, in other~~ learning environments, in co-curricular and extra-curricular activities, volunteering to assist with clerical tasks, sharing special skills or knowledge, or mentoring other youth.

Advocacy

Parents contribute to decisions benefiting the school environment and student instruction through a variety of means: parental representation on the Governing Council; parent leadership on the Bilingual Advisory Committee (which meets September through May); and through the parent surveys.

Assurance of Parental Commitment

Enrollment in the School of Unlimited Learning is an acknowledgement by the parent/guardian that they:

- Are willing to remain/become active in the learning of their child while he/she is enrolled in the school;
- Understand and support the distinctive nature of the school and agree to adhere to the school's policies and procedures.
- Receive and read a Parent/Student/Teacher handbook that includes the policies and procedures as well as graduation requirements and courses offered.

Element E: Qualifications of School Employees

*The qualifications to be met by individuals to be employed by the charter school.
California Education Code Section 47605(cb)(5)(E).*

The Fresno Economic Opportunities Commission is solely responsible for the hiring of all charter school staff, the setting of qualifications consistent with this charter and state/federal education laws, and the establishment and administration of employee compensation scales and benefits. Personnel administration is conducted in accordance with Fresno EOC Personnel Policies and Procedures and any School of Unlimited Learning Administrative Policies and Procedures adopted by the charter school's Governing Council and the Fresno EOC Board of Commissioners in the furtherance of this charter. Fresno EOC is non-sectarian in its hiring and employment practices.

No preference is given to teachers employed by FUSD who seek employment with the Fresno EOC charter school. All personnel hired to teach required subjects hold a valid [Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment pursuant to Education Code Section 47605\(l\)\(1\)](#). The Charter School may also use [local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a district. Teachers employed by charter schools during the 2019-20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment.](#)

~~California teaching credential~~Counselors and administrators hold a valid California credential appropriate to their designation [to the extent required by law](#). Instructors with special subject matter skills may be hired to teach courses not falling within the core academic subjects if credentialed teachers with the skills needed are not available. Instructors of these courses are required to have a college degree with course work in relevant subjects or 3-5 years of professional experience in the subject to be taught. All staff are subject to fingerprint and background checks as required by law.

An administrator, hired by Fresno EOC, performs day-to-day management of the school. Other staff may include case managers, counselors, social workers, job trainers and coaches, and other support staff. Fresno EOC charter school staff are evaluated in accordance with Fresno EOC Personnel Policies and Procedures and other Fresno EOC charter school policies that may be adopted to promote student achievement. Professional development is provided to the staff through several avenues: Fresno EOC Human Resources Department, Fresno EOC Information Technology Department, SOUL administrative staff, contracted professionals, district staff, or state officials.

All credentialed staff have their credentials filed with the Fresno County Office of Education, Fresno EOC Human Resources Department, and the school administrator, hereafter referred to as Principal/Chief Academic Officer (CAO) of the school). The Principal/CAO of the school serves as the advisor for each credentialed staff for credential renewal purposes.

Key qualifications for SOUL staff positions are outlined in specific job descriptions and overseen by Fresno EOC Human Resources Department.

Every employee of the charter school complies with Fresno EOC hiring procedures and those outlined in Section 44237 of the Education Code referencing criminal record summaries. Students with criminal records are handled under current policies of Education Code 49079 requiring notification to teachers about violent students.

Throughout the year, as required by the California Department of Education, SOUL provides employee and student information to the state through the California Longitudinal Pupil Achievement Data System (CALPADS). CALPADS is a longitudinal data system used to maintain individual-level data including student demographics, course data, discipline, assessments, staff assignments, and other data for state and federal reporting. Fresno EOC/SOUL complies with all mandated state and federal reporting.

As required by law, the school prepares an annual School Accountability Report Card to be approved by the Governing Council and the Fresno EOC Board of Commissioners.

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Element F: Health and Safety Procedures

The procedures that the charter school will follow to ensure the health and safety of pupils and staff. These procedures shall require all of the following:

(i) ~~(i)~~ That each employee of the charter school furnish the charter school with a criminal record summary as described in Section 44237.

(ii) For all schools, the development of a school safety plan, which shall include the safety topics listed in subparagraphs (A) to (K), inclusive, of paragraph (2) of subdivision (a) of Section 32282. For schools serving pupils in any of grades 7 to 12, inclusive, the development of a school safety plan shall also include the safety topic listed in subparagraph (L) of paragraph (2) of subdivision (a) of Section 32282.

(iii) That the school safety plan be reviewed and updated by March 1 of every year by the

The School of Unlimited Learning Charter High School provides and maintains a safe learning and working environment for all pupils and employees. All SOUL facilities meet or exceed state and local building codes. SOUL conducts an annual review and submits an updated annual Safe School Plan to Fresno Unified School District. All staff are subject to fingerprints and background checks as required by law.

SOUL staff are alerted to the health and safety needs of students and their families, staff, and volunteers. Policies and procedures are in place to define observation and reporting requirements for staff as well as attendance policies related to students and staff illnesses. Part of the supportive environment for students includes identifying early warning signs of distress so that appropriate interventions may be implemented. Staff are trained in First Aid and parents or guardians are appropriately notified of student illness or injury. Staff call for emergency medical assistance as warranted by the circumstances. Physicals are provided by Fresno EOC's Health Services as needed, and for all students participating in sports.

Students are required to maintain all health and immunization standards, including TB tests, and other records as required by state law. A copy of student immunization records is kept onsite in each student file. Employees maintain all health and immunization standards and other records as required of all regular Fresno EOC employees. All employees must be trained in First Aid, CPR, and mandated reporting laws.

Procedures for Background Checks

Employees and contractors of the Charter School will be required to submit to a criminal background check and to furnish a criminal record summary as required by Education Code Sections 44237 and 45125.1. Applicants for employment must submit two sets of fingerprints to the California Department of Justice for the purpose of obtaining a criminal record summary. The Charter School shall not hire any person, in either a certificated or classified position, who has been convicted of a violent or serious felony except as otherwise provided by law, pursuant to Education Code Sections 44830.1 and 45122.1. The Principal of the Charter School shall monitor compliance with this policy and report to the Charter School Board of Directors on a regular basis. The Board President Chair shall monitor the fingerprinting and background clearance of the Principal. Volunteers who will volunteer outside of the direct supervision of a credentialed employee shall be fingerprinted and receive background clearance prior to volunteering without the direct supervision of a credentialed employee.

Medication in School

The charter School will adhere to Education Code Section 49423 regarding administration of medicine in school. SOUL will adhere to Education Code Section 49414 regarding epinephrine auto-injectors and training for staff members. Per AB 1651, the Charter School shall store emergency epinephrine auto-injectors in an accessible location upon need for emergency use and include that location in annual notices required by law. To the extent the Charter School maintains a stock of albuterol inhalers to respond to respiratory distress in students, the Charter School shall comply with the requirements of Education Code Section 49414.7, including with respect to training, notices, and the stocking of albuterol inhalers.

Tuberculosis Risk Assessment and Examination

Employees, and volunteers who have frequent or prolonged contact with students, will be assessed and examined (if necessary) for tuberculosis prior to commencing employment and working with students, and for employees at least once each four years thereafter, as required by Education Code Section 49406.

Immunization

All immunization and health related issues for both employees and students in the charter school are addressed in accordance with Fresno EOC policy and applicable law (~~Education Code 47605.b.6~~). All enrolled students who engage in in-person learning or activities, e.g., at a resource center, will be required to provide records documenting immunizations as is required at public schools pursuant to Health and Safety Code Sections 120325-120375, and Title 17, California Code of Regulations Sections 6000-6075. All rising 7th grade students must be immunized with a pertussis (whooping cough) vaccine booster.

Suicide Prevention Policy

The Charter School shall maintain a policy on student suicide prevention in accordance with Education Code Section 215. The Charter School shall review, at minimum every fifth year, its policy on pupil suicide prevention and, if necessary, update its policy. Pursuant to AB 58 (2021-22), the Charter School will also review and update its suicide prevention policy by January 1, 2025 to incorporate best practices identified by the California Department of Education's model policy, as revised.

Prevention of Human Trafficking

The Charter School shall identify and implement the most appropriate methods of informing parents and guardians of students in grades 6 through 12 of human trafficking prevention resources.

Menstrual Products

The Charter School shall stock its restrooms at all times with an adequate supply of menstrual products, available and accessible, free of cost, in all women's restrooms and all-gender restrooms, and in at least one men's restroom. The Charter School shall post a notice regarding the requirements of this section in a prominent and conspicuous location in every restroom required to stock menstrual products, available and accessible, free of cost, pursuant to this section. This notice shall include the text of this section and contact information, including an email address and

telephone number, for a designated individual responsible for maintaining the requisite supply of menstrual products.

All Gender Restrooms

On or before July 1, 2026, the Charter School shall provide and maintain at least one all-gender restroom for voluntary student use at any schoolsite it operates that has more than one female restroom and more than one male restroom designated exclusively for student use. The restroom shall have signage identifying the bathroom as being open to all genders, it shall remain unlocked, unobstructed, and easily accessible by any student, and be available during school hours and school functions when students are present. The Charter School shall designate a staff member to serve as a point of contact and to post a notice regarding these requirements.

Nutritionally Adequate Free or Reduced Price Meal

The Charter School shall provide each needy student, as defined in Education Code Section 49552, with one nutritionally adequate free or reduced-price meal, as defined in Education Code Section 49553(a), during each school day. The Charter School shall provide this meal for any eligible student on any school day that the student is scheduled for educational activities, as defined in Education Code Section 49010, lasting two or more hours, at a school site, resource center, meeting space, or other satellite facility operated by the Charter School.

California Healthy Youth Act

The Charter School shall teach sexual health education and human immunodeficiency virus ("HIV") prevention education to students pursuant to the California Healthy Youth Act (Education Code Section 51930, et seq.).

Fire and Earthquake Preparedness

SOUL has developed, implemented, and maintains an earthquake preparedness program as part of its annual Safe School Plan. The charter school has implemented a fire safety program including scheduled fire drills, earthquake drills, and disaster preparedness training for students and staff as delineated in the annual Safe School Plan. The annual Safe School Plan is revised on an annual basis, approved by SOUL's Governing Council, submitted to Fresno Unified School District by March 1 of each year, and reviewed with school staff at the beginning of each school year.

Physical and Sexual Abuse Training

All employees will be mandated child abuse reporters and will follow all applicable reporting laws, the same policies and procedures used by the District. On-going training is provided to all school employees on the identification of physical abuse, sexual abuse, neglect, and the appropriate responses as required by law. Employees are required to report all incidents of child abuse or suspected child abuse. In addition, annual training on bullying is provided to all staff. SOUL shall provide mandated reporter training to all employees annually in accordance with Education Code Section 44691.

School Safety Plan

The Charter School shall adopt a School Safety Plan, to be reviewed and updated by March 1 of every year, which shall include identification of appropriate strategies and programs that will provide or maintain a high level of school safety and address the Charter School's procedures for

complying with applicable laws related to school safety, including the development of all of the following pursuant to Education Code Section 32282(a)(2)(A)-(K):

- child abuse reporting procedures
- routine and emergency disaster procedures
- policies for students who committed an act under Education Code Section 48915 and other Charter School-designated serious acts leading to suspension, expulsion, or mandatory expulsion recommendations
- procedures to notify teachers of dangerous students pursuant to Education Code Section 49079
- a discrimination and harassment policy consistent with Education Code Section 200
- provisions of any schoolwide dress code that prohibits students from wearing "gang-related apparel," if applicable
- procedures for safe ingress and egress of pupils, parents, and employees to and from the Charter School
- a safe and orderly environment conducive to learning
- the rules and procedures on school discipline adopted pursuant to Education Code Sections 35291, 35291.5, 47605
- Procedures to assess and respond to reports of any dangerous, violent, or unlawful activity that is being conducted or threatened to be conducted at the school, at an activity sponsored by the school, or on a schoolbus serving the school
- procedures for conducting tactical responses to criminal incidents
- a protocol in the event a pupil is suffering or is reasonably believed to be suffering from an opioid overdose

The School Safety Plan shall be drafted specifically to the needs of the facility in conjunction with law enforcement and the Fire Marshal. Staff shall receive training in emergency response, including appropriate "first responder" training or its equivalent.

Disaster procedures included in the School Safety Plan shall address and include adaptations for students with disabilities. To the extent an employee, parent/guardian, educational rights holder, or student brings concerns regarding the procedures to the principal and, if there is merit to the concern, the principal shall direct the School Safety Plan to be modified accordingly.

Workplace Violence Prevention Plan

As of July 1, 2024, the Charter School shall establish, implement, and maintain, at all times in all work areas, an effective workplace violence prevention plan consistent with the requirements of Labor Code Section 6401.9.

Bloodborne Pathogens

The Charter School shall meet state and federal standards for dealing with bloodborne pathogens and other potentially infectious materials in the work place. The Board shall establish a written infectious control plan designed to protect employees and students from possible infection due to contact with bloodborne viruses, including hepatitis B virus ("HBV"). Whenever exposed to blood or other bodily fluids through injury or accident, staff and students shall follow the latest medical protocol for disinfecting procedures.

Drug-, Alcohol-, and Smoke-Free Environment

The Charter School shall function as a drug-, alcohol-, and smoke-free environment.

Facility Safety

The Charter School shall comply with Education Code Section 47610 by utilizing facilities that are either compliant with the Field Act or facilities that are compliant with the California Building Standards Code. The Charter School agrees to test sprinkler systems, fire extinguishers, and fire alarms annually at its facilities to ensure that they are maintained in an operable condition at all times. The Charter School shall conduct fire drills as required under Education Code Section 32001.

Comprehensive Anti-Discrimination and Harassment Policies and Procedures

The Charter School is committed to providing a school that is free from discrimination and sexual harassment, as well as any harassment based upon the actual or perceived characteristics of race, religion, creed, color, gender, gender identity, gender expression, nationality, national origin, ancestry, ethnic group identification, genetic information, age, medical condition, marital status, sexual orientation, sex and pregnancy, physical or mental disability, childbirth or related medical conditions, military and veteran status, denial of family and medical care leave, or on the basis of a person's association with a person or group with one or more of these actual or perceived characteristics, or any other basis protected by federal, state, local law, ordinance or regulation. The Charter School shall develop a comprehensive policy to prevent and immediately remediate any concerns about discrimination or harassment at the Charter School (including employee to employee, employee to student, and student to employee misconduct). Misconduct of this nature is very serious and will be addressed in accordance with the Charter School's anti-discrimination and harassment policies.

A copy of the policy shall be provided as part of any orientation program conducted for new and continuing pupils at the beginning of each quarter, semester, or summer session, as applicable, and to each faculty member, all members of the administrative staff, and all members of the support staff at the beginning of the first quarter or semester of the school year, or at the time that there is a new employee hired. The Charter School shall create a poster that notifies students of the applicable policy on sexual harassment in accordance with Education Code Section 231.6, and shall prominently and conspicuously display the poster in each bathroom and locker room at the schoolsite and in public areas at the schoolsite that are accessible to, and commonly frequented by, pupils.

Bullying Prevention

The Charter School shall adopt procedures for preventing acts of bullying, including cyberbullying. The Charter School shall annually make available the online training module developed by the CDE pursuant to Education Code Section 32283.5(a) to certificated schoolsite employees and all other schoolsite employees who have regular interaction with children.

Supporting LGBTQ Students

Commencing with the 2025-26 school year and ending with completion of the 2029-30 school year, the charter school shall use an online training delivery platform and curriculum to provide at least

1 hour of required LGBTQ cultural competency training annually to teachers and other certificated employees and maintain records of such training as required by Education Code Section 218.

Homicide Threats

The Charter School shall comply with all requirements under Education Code Sections 49390-49395 regarding mandatory reporting in response to homicidal threats. All employees and Board members who are alerted to or who observe any threat or perceived threat in writing or through an action of a student that creates a reasonable suspicion that the student is preparing to commit a homicidal act related to school or a school activity shall make a report to law enforcement.

Gun Safety Notice

Beginning in the 2023-24 school year, at the beginning of the first semester, the Charter School shall distribute a notice to the parents/guardians of each student addressing California's child gun access prevention laws and laws related to firearm safety utilizing the most updated model language published by the California Department of Education.

Athletic Programs

To the extent the Charter School operates athletic programs, the Charter School shall comply with all applicable laws related to health and safety policies and procedures surrounding athletic programs at charter schools, including but not limited to providing information to athletes regarding sudden cardiac arrest and annually providing each athlete an Opioid Factsheet for Patients. In the event the Charter School participates in any interscholastic athletic programs, it shall comply with all applicable requirements, including, but not limited to, adopting a written emergency action plan for sudden cardiac arrest or other medical emergencies related to athletic programs, and acquiring at least one automated external defibrillator. Further, the Charter School's emergency action plan shall describe the location of emergency medical equipment and include a description of the manner and frequency at which the procedures to be followed in the event of sudden cardiac arrest and other medical emergencies, including concussion and heat illness will be rehearsed. By July 1, 2024, coach training shall include recognition of the signs and symptoms of and responding to concussions, heat illness, and cardiac arrest.

In the event the Charter School participates in the California Interscholastic Federation it shall, on or before April 1, 2025, post on its website a standardized incident form as developed by the CDE to receive complaints of racial discrimination, harassment, or hazing alleged to occur at high school sporting games or sporting event and shall include instructions on how to submit a completed incident form consistent with Education Code Section 33353.

Transportation Services.

Effective July 1, 2025, the Charter School shall comply with the requirements of Education Code Section 39875(c), if applicable, relating to background checks and testing for individuals providing transportation services for students."

Element G: ~~Means to Achieve a Racial and Ethnic~~Student Population Balance

"The means by which the charter school will achieve a balance of racial and ethnic ~~balance among its pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils, as defined by the evaluation rubrics in Section 52064.5,~~ that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. Upon renewal, for a charter school not deemed to be a local educational agency for purposes of special education pursuant to Section 47641, the chartering authority may consider the effect of school placements made by the chartering authority in providing a free and appropriate public education as required by the federal Individuals with Disabilities Education Act (Public Law 101-476), on the balance of pupils with disabilities at the charter school." California Education Code Section 47605(~~cb~~)(5)(G).

The School of Unlimited Learning continues to strive to maintain a balance of racial and ethnic ~~balance among its pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils~~ that is reflective of the general population within the city of Fresno District through SOUL's open enrollment policy.

The School of Unlimited Learning conducts outreach designed to achieve and maintain this balance in a variety of ways. SOUL's programs are listed on the Fresno EOC's website and are designed to target and relate to the students who are the subject of Education Code Section 47605(c)(5)(G). SOUL receives several referrals from many of the programs operated by Fresno EOC, such as Employment and Training, Early Head Start, Fresno EOC Health Clinics, Fresno EOC Sanctuary/Youth Shelter, Fresno EOC Street Outreach, and the WIC program. On a regular basis, SOUL provides updated information to other high schools regarding enrollment, admissions, etc., including SOUL's capacity to well serve a racially and ethnically diverse student population, as well as special education students and English learners. Over the past several years, SOUL has created close working relationships with such agencies as Fresno County Probation, the Juvenile Justice System, Kaiser Mental Health, and a variety of foster care facilities from which SOUL receives numerous referrals, and which serve students of diverse racial and ethnic backgrounds, students who qualify for special education services, and English learners. In addition, SOUL staff is invited on occasion to describe its educational programs and services on local Spanish radio and television, supporting SOUL's outreach efforts to racial and ethnic students and English learners. Flyers describing school program and services are made available in Spanish. Through these broad outreach activities and referral channels across the jurisdiction of the District, SOUL is able to recruit racial and ethnic pupils, special education students, and English learners representative of the District's population, and SOUL will continue to develop, implement, and revise outreach strategies as necessary to achieve the student population balance identified in this element.

Element H: Admissions ~~Requirements~~ Policies and Procedures

"Admission ~~requirements, if applicable~~ policies and procedures, consistent with [Education Code Section 47605] subdivision (e)." California Education Code Section 47605(~~cb~~)(5)(H).

Charter schools are schools of choice. The charter school admits all pupils who wish to attend the school. For all students, the following apply:

Consistent with California Education Code, Section 47605-~~(e)d~~, the School of Unlimited Learning develops and adopts its own procedures for student enrollment. The School of Unlimited Learning has an open enrollment and open exit policy. Enrollment shall be voluntary and no tuition is charged. The School of Unlimited Learning is non-sectarian in its admission policies and its programs and shall not discriminate against any student on the basis of race, ethnicity, national origin, gender, sexual orientation, religion, or disability, or any of the characteristics listed in Education Code Section 220, and follows federal laws concerning discrimination.

In accordance with Education Code Sections 49011 and 47605(e)(2)(B)(iv), admission preferences shall not require mandatory parental volunteer hours as a criterion for admission or continued enrollment.

In accordance with Education Code Section 47605(e)(4)(A), the Charter School shall not discourage a pupil from enrolling or seeking to enroll in the charter school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), including pupils with disabilities, academically low-achieving pupils, English Learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation. Similarly, in accordance with Section 47605(e)(4)(C), the Charter School shall not encourage a pupil currently attending the Charter School to disenroll from the Charter School or transfer to another school for any reason, including, but not limited to, the academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), as listed above.

Pursuant to Education Code Section 47605(e)(4)(D), the Charter School shall post a notice developed by CDE on the Charter Schools website, outlining the requirements of Section 47605(e)(4), and make this notice available to parents (i) when a parent, guardian, or pupil inquires about enrollment; (ii) before conducting an enrollment lottery; (iii) before disenrollment of a pupil.-

In the event there are too many eligible applicants for the space available, ~~a waiting list is used. When space becomes available, the school uses this list to fill the vacancies by a public random drawing~~SOUL will conduct a random public drawing consistent with the procedures below. Consistent with California Education Code 47605-~~(e)d(-2)-~~(B), preference is extended to pupils currently attending the charter school and pupils who reside in the Fresno Unified School District. In order to attain SOUL's vision of a racially, economically, and geographically diverse population,

SOUL had developed an admissions process designed to reach out to all families and to enable the school to have a balanced and diverse student body.

Educationally disadvantaged students are targeted. Research on the progress of charter schools in meeting the needs of the educationally disadvantaged shows that charter schools can indeed serve all students. Surveys of California's charter schools have demonstrated that these schools are educating a higher percentage of educationally disadvantaged students and below-grade-level students than their counterpart district schools.

If a student has been expelled from another school district, the School of Unlimited Learning reserves the right to review the student expulsion data to determine feasibility of appropriate placement.

The School of Unlimited Learning complies with all state and federal laws relating to the provision of special education services for public school pupils. No student otherwise eligible to enroll in the charter school will be denied enrollment due to a disability or the charter school's inability to provide necessary services.

In accordance with Education Code Section 47605(e)(4)(B), the Charter School shall not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the Charter School before enrollment.

The principal/designee meets regularly with onsite special education personnel. Special education personnel onsite at a charter school should always be working as a team with the school staff. The Principal holds special education personnel accountable for how IEP goals and objectives are communicated to teachers, aides, and parents. Persons hired to provide special education services, if not credentialed, receive the specialized training to provide the appropriate services to special education students.

Specific services pertaining to special education students and English Language Learners are specifically outlined in this charter document under Element A: Description of the School's Educational Program.

Public Random Drawing

Applications will be accepted during publicly advertised open enrollment periods(s) each year for enrollment in the following or current school year. Following the open enrollment period(s) each year, applications shall be counted to determine whether any grade level has received more applications than availability. In the event that this happens, the Charter School will hold a public random drawing (or "lottery") to determine admission for the impacted grade level, with the exception of existing students, who are guaranteed admission in the following school year. Admission preferences in the case of a public random drawing shall be given to the following students in the following order:

1. Siblings of students admitted to or attending the Charter School

2. Children of Charter School teachers, staff, and board members
3. Residents of the District
4. All other applicants

The Charter School agrees to adhere to the requirements related to admission preferences as set forth in Education Code Section 47605(e)(2)(B)(i)-(iv).

The Board of Directors will take all necessary efforts to ensure lottery procedures are fairly executed. Lottery spaces are pulled in order of grade level by the designated lottery official (appointed by the Chief Executive Officer). Separate lotteries shall be conducted for each grade in which there are fewer vacancies than pupils interested in attending. All lotteries shall take place on the same day in a single location. Lotteries will be conducted in ascending order beginning with the lowest applicable grade level. There is no weighted priority assigned to the preference categories; rather, within each grade level, students will be drawn from pools beginning with all applicants who qualify for the first preference category, and shall continue with that preference category until all vacancies within that grade level have been filled. If there are more students in a preference category than there are spaces available, a random drawing will be held from within that preference category until all available spaces are filled. If all students from the preference category have been selected and there are remaining spaces available in that grade level, students from the second preference category will be drawn in the lottery, and the drawing shall continue until all spaces are filled and preference categories are exhausted in the order provided above.

At the conclusion of the public random drawing, all students who were not granted admission due to capacity shall be given the option to put their name on a wait list according to their draw in the lottery. This wait list will allow students the option of enrollment in the case of an opening during the current school year. In no circumstance will a wait list carry over to the following school year.

Public random drawing rules, deadlines, dates and times will be communicated in the application form and on the Charter School's website. Public notice for the date and time of the public random drawing will also be posted once the application deadline has passed. The Charter School will also inform all applicants and interested parties of the rules to be followed during the public random drawing process via mail or email at least two weeks prior to the lottery date.

The Charter School will conduct the lottery in the spring for enrollment in fall of that year, and at periodic intervals during the then-current school year as necessary. In the event that an opening arises or exists during the school year and the Charter School has exhausted its wait list from the preceding lottery, or there was no prior lottery and wait list, the Charter School will conduct a random public drawing according to the procedures above at specified open enrollment intervals during the school year.

Element I: Financial (and Programmatic) Audit

“The manner in which annual, independent, financial audits shall be conducted , which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.” Education Code Section 47605(~~bc~~)(5)(l).

As a 501.c.3 nonprofit organization, Fresno EOC conforms to existing law that governs non-profit organizations and has established a “financially independent charter school”. This term was recommended by the California Department of Education in October 1997 to distinguish such programs from those operating under the fiscal accountability framework (AB 1200) of the chartering entity. Fresno EOC maintains financial records relating to the operation of the charter school in accordance with generally accepted accounting standards of fiscal management. Fresno EOC conducts, at its own expense, an annual audit of the financial and programmatic operations of the Fresno EOC charter school, as required by Education Code Sections 47605(c)(5)(l) and 47605(m).

The financial audit is conducted as part of the annual overall agency audit, which is performed by an independent auditing firm of certified public accountants who have experience in education finance. A copy of the audit report, including an audit report on the distinct fiscal operations of the school, is submitted to FUSD within 30-days of its completion, which is on or before December 15th. Pending completion of annual audit reports, financial statements are provided to meet other FUSD financial reporting needs.

FUSD’s oversight and monitoring obligations are clearly delineated under Section D, titled “Fiscal Relationship, of the Memorandum of Understanding between Fresno EOC’s SOUL Charter School and Fresno Unified School District”.

Failure to provide an annual audit or resolve material audit exceptions may lead to automatic reconsideration of the charter agreement subject to the procedures under Education Code Section 47607(f)-(h). To continue operation of the charter school under such circumstances ~~requires approval of the FUSD Board of Trustees~~ subject to the procedures under Education Code Section 47607(f)-(h).

Fresno Unified School District, as the chartering agency, is not liable for the debts or obligations of the charter school. (Education Code 47604-~~(d)~~-e).

Element J: Pupil Suspension and Expulsion Policy and Procedures

"The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that are consistent with all of the following:

(i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the pupil and, if the pupil denies the charges, an explanation of the evidence that supports the charges and an opportunity for the pupil to present the pupil's side of the story.

(ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:

(I) Provide timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.

(II) Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate.

(iii) Contain a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five school days before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parent or guardian, or, if the pupil is a homeless child or youth, or a foster child or youth, in the native language of the homeless or foster child's educational rights holder. In the case of a foster child or youth, the written notice shall also be provided to the foster child's attorney and county social worker. If the pupil is an Indian child, as defined in Section 224.1 of the Welfare and Institutions Code, the written notice shall also be provided to the Indian child's tribal social worker and, if applicable, county social worker. The written notice shall inform the pupil, the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, and county social worker, or the Indian child's tribal social worker and, if applicable, county social worker of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, or county social worker, or the Indian child's tribal social worker or, if applicable, county social worker initiates the procedures specified in clause (ii), the pupil shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii).

(iv) A foster child's educational rights holder, attorney, and county social worker and an Indian child's tribal social worker and, if applicable, county social worker shall have the same rights a

parent or guardian of a child has to receive a suspension notice, expulsion notice, manifestation determination notice, involuntary transfer notice, and other documents and related information.”
California Education Code Section 47605(b)(5)(J).

Student Suspension and Expulsion

Pursuant to California Education Code, Sections 48900 through 48927, students of the School of Unlimited Learning may be expelled from the charter school for persistent non-compliance with the terms of this charter and the rules, procedures, and policies outlined in the SOUL parent/student handbook. SOUL maintains a comprehensive set of student discipline policies. These policies are distributed as part of the school's parent/student handbook and clearly describe the school's expectations regarding attendance, mutual respect, substance abuse, violence, safety, work habits, and acceptable behavior.

Suspension, the temporary removal of the student from the student body, is a serious disciplinary sanction. A student is suspended for repeated major behavioral violations or for serious misconduct after having been placed on a student contract. A suspended student is removed from all extra-curricular and co-curricular activities for a designated period of time.

No student shall be involuntarily removed by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to remove the student no less than five (5) school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian and shall inform the student, and the student's parent/guardian of the basis for which the student is being involuntarily removed, and the student's parent/guardians right to request a hearing to challenge the involuntary removal. If a student's parent, guardian requests a hearing, the Charter School shall utilize the same hearing procedures specified below for expulsions, before the effective date of the action to involuntarily remove the student. If the student's parent/guardian requests a hearing, , the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as enumerated below. Students may be involuntarily removed for reasons including, but not limited to, failure to comply with the terms of the student's independent study Master Agreement pursuant to Education Code Section 51747(c)(4).

Homework Assignments During Suspension

In accordance with Education Code Section 47606.2(a), upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the student, or the affected student, a teacher shall provide to a student in any of grades 9 to 12, inclusive, who has been suspended from school for two (2) or more school days, the homework that the student would otherwise have been assigned. In accordance with Education Code Section 47606.2(b), if a homework assignment that is requested pursuant to Section 47606.2(a) and turned into the teacher by the student either upon the student's return to school from suspension or within the timeframe originally prescribed by the teacher, whichever is later, is not graded before the end of the academic term, that assignment shall not be included in the calculation of the student's overall grade in the class.

Notice to Teachers

The Charter School shall notify teachers of each student who has engaged in or is reasonably suspected to have engaged in any of the acts listed in Education Code Section 49079 and the corresponding enumerated offenses set forth below.

Withdrawal/Removal from Program

In lieu of expulsion and under applicable circumstances, SOUL reserves the right to involuntarily remove a student from the program subject to the requirements of Education Code Section 47605(c)(5)(J). Upon recommendation by the Guidance Dean, the Principal pursues a student's expulsion and/or permanent-involuntary removal from the school. A student may be expelled for continual or serious misconduct (violation of Zero Tolerance Policy), or for a serious offense or for a series of infractions detrimental to the order of the school.

SOUL's procedures for handling student discipline, suspension, and expulsion from the program follow the procedures identified in California Education Code, Section 48900. Prior to enrollment, each student and his/her parent/guardian are required to verify that they have reviewed and understand the school policies. Students that have either violated the school's discipline policies, who have caused a serious disruption to the educational process, and/or who present a safety threat may be suspended for up to 5 school days. The school notifies and confers with the student's parent/guardian as soon as possible regarding the suspension. If the violation of the discipline policy constitutes a serious offense, and/or if the student presents an ongoing threat to the safety of the school in general, school administration may take action to expel the student from the school. In such cases, the school sends a written notice of the facts, allegations, and student/parent rights to the parent/guardian and a committee designated by administration holds a hearing regarding the offense. The committee may recommend that the student be expelled or offered reinstatement, as appropriate. These processes are amended as required by law to protect the rights of students with disabilities or exceptional needs.

Grounds for Suspension and Expulsion of Students

Education Code 48900 – Conditions for Suspension/Expulsion

A pupil shall not be suspended from school or recommended for expulsion unless the superintendent or the principal of the school in which the pupil is enrolled determines that the pupil has violated section 48900, section 48900.2, section 48900.3, or section 48900.4 of the California Education Code: (1) While open school grounds; (2) While going to or coming from school; (3) During the lunch period whether on or off campus or (4) During, or while going to or coming from a school sponsored activity or under the supervision of school staff.

A student may be suspended or expelled for any of the following acts when it is determined the pupil:

- (a) Caused, attempted to cause, or threatened to cause physical injury to another person or willfully used force or violence upon the person of another except in self-defense.
- (b) Possessed sold, or otherwise furnished any firearm, knife, explosive, mace/pepper spray or other dangerous object unless, in the case of possession of any object of this type the pupil had obtained written permission to possess the item from a certificated school employee, which is concurred by the principal or the designee of the principal.
- (c) Unlawfully possessed, used sold, or otherwise furnished, or been under the influence of,

any controlled substance listed in Chapter 2 (commencing with Section 11053) of Division 10 of the Health and Safety Code, an alcoholic beverage, or an intoxicant of any kind.

(d) Unlawfully offered, arranged or negotiated to sell any controlled substance listed in Chapter 2 (commencing with Section 11053) Of Division 10 of the Health and Safety Code, an alcoholic beverage, or an intoxicant of any kind, and then either sold, delivered, or otherwise furnished to any person another liquid, substance, or material and represented the liquid, substance, or material as a controlled substance, alcoholic beverage, or intoxicant.

(e) Committed or attempted to commit robbery or extortion.

(f) Caused or attempted to cause damage to school property or private property.

(g) Stolen or attempted to steal school property or private property.

(h) Possessed or used tobacco, or any products containing tobacco or nicotine products, including, but not limited to, cigarettes cigars, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. However this section does not prohibit use or possession by a pupil of his or her own prescription products.

(i) Committed an obscene act or engaged in habitual profanity or vulgarity.

(j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Section 11014.5 of the Health and Safety Code.

~~(k) Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties.~~

(l) Engaged in hazing, or malicious defamation of other pupils or school personnel.

(m) Committed an act in violation of the Dress Code, Closed Campus or any other SOUL Governing Council Policy and or school regulation.

(n) Engaged in a gang-related activity.

(o) Knowingly received stolen school property or private property.

(p) Possession of an imitation firearm. As used in this section, "imitation firearm" means a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude the replica is a firearm.

(q) Committed or attempted to commit a sexual assault as defined in Section 261. 266c. 286., 287, 288., 288a. or 289 of, or former section 288a of, the Penal Code or committed a sexual battery as defined in Section 243.4 of the Penal Code.

(r) Harassed threatened, or intimidated a pupil who is a complaining witness or witness in a school disciplinary proceeding for the purpose of either preventing that pupil from being a witness or retaliating against that pupil for being a witness, or both.

(s) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.

(t) Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, "hazing" means a method of initiation or pre-initiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.

(u) Made terrorist threats against school officials and/or school property. For purposes of this section, "terroristic threat" includes any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, or the personal property of the person threatened

or his or her immediate family.

(v) Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section applies to pupils in any of grades 4 to 12, inclusive.

(w) Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section applies to pupils in any of grades 4 to 12, inclusive.

(x) Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. This section applies to pupils in any of grades 4 to 12, inclusive.

(y) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act (defined as the transmission of a communication, including, but not limited to, a message, text, sound, or image, or a post on a social network Internet Web site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone or other wireless communication device, computer, or pager) directed specifically toward a pupil or school personnel. "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including acts one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:

1. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
2. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
3. Causing a reasonable student to experience substantial interference with his or her academic performance.
4. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School

(z) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury are subject to discipline pursuant to subdivision (a4). ~~(a4) Caused, attempted to cause, or threatened to cause physical injury to another person.~~

(aa) A pupil who, within the meaning of Education Code Section 48900(.2), commits Sexual Harassment, as defined in Section 212.5, (grades 4-12).

(bb) A pupil who, within the meaning of Education Code Section 48900(.3) attempted, threatened, caused, or participated in an act of hate violence, (grades 4-12). In addition to the reasons specified in Sections 48900 and 48900.2, a pupil in any of grades 4 to 12, inclusive, may be suspended from school or recommended for expulsion from the program if the principal of the school in which the pupil has caused, attempted to cause, threatened to cause, or participated in an act of hate violence as defined in subdivision (e) of Section 33032.5. Hate Violence Defined EC (e) aAs used in the

section, "hate violence" means any act punishable under Section 422.6 or 422.75 of the penal code.

(cc) A pupil who, within the meaning of Education Code Section 48900(-4)-i-Intentionally engaged in harassment, threats, or intimidation against a pupil or group of —pupils, grades 4-12.

(dd) A pupil who, within the meaning of Education Code Section 48900(-7) m-Made terrorist threats against school officials or school property, or both.

Education Code 48915

1. Mandatory Recommendation for Expulsion: (1) causing serious physical injury to another person, except in self-defense; (2) possession of any knife, explosive, or other dangerous object of no reasonable use to the pupil at school; (3) unlawful possession of any controlled substance except for the first offense for the possession of not more than one avoirdupois ounce of marijuana other than concentrated cannabis; (4) robbery or extortion; and (5) assault or battery upon a school employee.
2. Mandatory Expulsion Requirements: (1) Possessing, selling, or otherwise furnishing a firearm verified by an employee of a school district); (2) brandishing a knife at another person; (3) unlawfully selling a controlled substance; and (4) committing or attempting to commit a sexual assault as defined in subdivision (n) of Section 48900 or committing a sexual battery as defined in subsection (n) of Section 48900.

This policy will apply to students in grades 9-12. Hereafter, all students who possess and/or commit the actions listed under the Zero Tolerance Policy are immediately suspended and recommended for expulsion, unless the particular circumstances of the case show that expulsion is inappropriate. No exceptions are made in the case of possession of a loaded or unloaded firearm.

Enforcement of Discipline

A pupil may not be suspended or expelled from the program, for any of the acts enumerated unless that act is related to SOUL School academia, activities and/or attendance under the jurisdiction of the Fresno Economic Opportunities Commission. A pupil may be suspended or expelled for acts which are enumerated in the Education Code and are related to school academics, activities, or attendance that occur anytime, including but not limited to, any of the following: while on school grounds, while going to or coming from school, during the lunch period (whether on or off the campus), during, or while going to or coming from a school sponsored activity.

The principal or designee takes appropriate action to eliminate possession, use, or sale of alcohol and other drugs and related paraphernalia on school grounds, at school events, or in any situation in which the school is responsible for the conduct and wellbeing of students. Student possession, sales, and/or use of drugs or alcohol, and the results thereof, are subject to disciplinary procedure that results in suspension and/or expulsion.

Upon recommendation by the Guidance Dean, the Principal will pursue the student's expulsion and/or permanent removal from the school. A student may be expelled for continual or serious misconduct (violation of Zero Tolerance Policy outlined in the SOUL parent/student handbook and consistent with California Education Code, § 48900). A student can be expelled for a serious offense, or for a series of infractions detrimental to the order of the school.

All acts of violence committed and instances of possession of weapons are recorded per pupil, on their record. In every case, students who violate applicable Education and Penal Codes referenced by this policy are referred to the appropriate law enforcement authorities. Parents/guardians acknowledge receipt of the Zero Tolerance Letter of Notification by their signature.

Suspension Procedure

Suspensions shall be initiated according to the following procedures:

1. Conference

Suspension shall be preceded, if possible, by a conference conducted by the Principal or designee with the student and the student's parent/guardian and, whenever practical, the teacher, supervisor or Charter School employee who referred the student to the Principal or designee.

The conference may be omitted if the Principal or designee determines that an emergency situation exists. An "emergency situation" involves a clear and present danger to the lives, safety or health of students or Charter School personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the student shall be informed of the reason for the disciplinary action and the evidence against the student and shall be given the opportunity to present their version and evidence in their defense, in accordance with Education Code Section 47605(c)(5)(J)(i). This conference shall be held within two (2) school days, unless the student waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization. No penalties may be imposed on a student for failure of the student's parent or guardian to attend a conference with Charter School officials. Reinstatement of the suspended student shall not be contingent upon attendance by the student's parent/guardian at the conference.

2. Notice to Parents/Guardians

At the time of the suspension, an administrator or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date of return following suspension. This notice shall state the specific offense(s) committed by the student as well as the date the student may return to school following the suspension. In addition, the notice may also state the time when the student may return to school. If Charter School officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

3. Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension. Upon a recommendation of expulsion by the Principal or designee, the student and the student's parent/guardian or representative will be invited to a conference to determine if the suspension for the student should be extended pending an expulsion hearing. In such instances when the Charter School has determined a suspension period shall be extended, such extension shall be made only after a conference is held with the student or the

student's parent/guardian, unless the student and the student's parent/guardian fail to attend the conference.

This determination will be made by the Principal or designee upon either of the following: 1) the student's presence will be disruptive to the education process; or 2) the student poses a threat or danger to others. Upon either determination, the student's suspension will be extended pending the results of an expulsion hearing.

Authority to Expel

As required by Education Code Section 47605(c)(5)(J)(ii), students recommended for expulsion are entitled to a hearing adjudicated by a neutral officer to determine whether the student should be expelled. The procedures herein provide for such a hearing and the notice of said hearing, as required by law.

A student may be expelled either by the neutral and impartial Charter School Board of Directors following a hearing before it or by the Charter School Board of Directors upon the recommendation of a neutral and impartial Administrative Panel, to be assigned by the Board of Directors as needed. The Administrative Panel shall consist of at least three (3) members who are certificated and neither a teacher of the student nor a member of the Charter School Board of Directors. Each entity shall be presided over by a designated neutral hearing chairperson. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense, and the Board of Directors shall make the final determination.

Expulsion Procedures

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Principal or designee determines that the student has committed an expellable offense and recommends the student for expulsion.

In the event an Administrative Panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session (complying with all student confidentiality rules under the Family Educational Rights and Privacy Act ("FERPA")) unless the student makes a written request for a public hearing in open session three (3) days prior to the date of the scheduled hearing.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the student. The notice shall include:

1. The date and place of the expulsion hearing;
2. A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;
3. A copy of the Charter School's disciplinary rules which relate to the alleged violation;
4. Notification of the student's or parent/guardian's obligation to provide information about the student's status at the Charter School to any other school district or school to which the student seeks enrollment;
5. The opportunity for the student and/or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non-attorney advisor;

6. The right to inspect and obtain copies of all documents to be used at the hearing;
7. The opportunity to confront and question all witnesses who testify at the hearing;
4. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

Services During Suspension

Students suspended for more than ten (10) school days in a school year continue to receive services so as to enable the student to:

- Continue to participate in the general education curriculum, although in another setting.
- To make progress toward the goals set out in the child's IEP, and receive a functional behavioral assessment or functional analysis.
- Receive behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur. These services may be provided on an interim basis in an alternative, educational setting.

Procedural Safeguards/Manifestation Determination

Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability because of a violation of a code of student conduct, SOUL staff, the parent, and relevant members of the IEP Team reviews all relevant information in the student's file, including the child's IEP, any teacher observations, and any relevant information provided by the parents to determine:

- a) If the conduct in question was caused by, or had a direct and substantial relationship to the child's disability.
- b) If the conduct in question was the direct result of the local educational agency's failure to implement the IEP.

If the Charter School, the parent, and relevant members of the IEP Team determine that either of the above is applicable for the child, the conduct is determined to be a manifestation of the child's disability.

If the Charter School, the parent, and relevant members of the IEP Team make the determination that the conduct was a manifestation of the child's disability, the IEP Team does the following:

- a) Conducts a functional behavioral assessment or a functional analysis assessment, and implements a behavioral intervention plan for said child, provided that the Charter School had not conducted such an assessment prior to the behavior that resulted in a change of placement;
- b) Reviews the child's behavioral intervention plan if the child already has such a plan (or develop one if necessary) and discuss what, if any, modifications would be necessary to address the behavior.
- c) Returns the child to the placement from which the child was removed, unless the parent and the Charter School agree to a change of placement as part of the modification of the behavioral intervention plan.

If the Charter School, the parent, and relevant members of the IEP team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a result of the failure to implement the IEP, then the Charter School may apply the relevant disciplinary procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

Disciplinary Records

The Charter School maintains records of all student suspensions at the Charter School.

Expelled Pupils

Pupils who are expelled for misconduct or violation of the California Education Code are responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence. SOUL staff work cooperatively with parents/guardians as requested by parents/guardians or by the school district of residence to assist with locating alternative placement.

Admission/Readmission Previously Expelled Student

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school is up to the sole discretion of the SOUL administrative staff as to whether the pupil poses a threat to others or is disruptive to the school environment.

SOUL's discipline policies and procedures are reviewed annually and, when necessary, modified to reflect changes in California Education Code, EOC Board Policy and charter law. SOUL recognizes the need for increased flexibility in dealing with safety issues, as well as due process protections for students identified with special needs. Special education records are used, in addition to discipline records, in making final decisions in regards to disciplinary action. The rights of students with disabilities will be upheld according to the federal and state rules and regulations that govern services to students with disabilities.

Element K: Staff Retirement System

"The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security." Education Code Section 47605(c)(5)(K).

All certificated and classified SOUL school staff are employees of Fresno EOC and are eligible for Fresno EOC benefits on the same basis as other Fresno EOC employees. Specifically, the Human Resources Department of Fresno EOC is responsible for the oversight of all coverage and payments, including Federal Social Security and an employer-supported pension plan.

FRESNO EOC POLICY 3050 PENSION PLAN

PURPOSE: To provide eligible employees with pension benefits in addition to basic social security benefits.

POLICY: It is the policy of Fresno EOC to provide a defined contribution pension plan funded by contributions made by Fresno EOC and voluntary contributions from employees. All benefits provided in the pension plan are described in the plan document which is available for examination in the Human Resources Office. This document is available for examination by any plan participant or beneficiary.

REFERENCE: Pension Plan of Fresno EOC as amended; Internal Revenue Code § 415; Employee Retirement Income Security Act of 1974; 1991 Omnibus Bill.

PROCEDURES:

I. CONTRIBUTIONS

On December 30, 1980, the Fresno Economic Opportunities Commission adopted a defined contribution plan. The benefits provided by the Plan are funded by contributions made by Fresno EOC plus the income derived from the investment of such contributions. Fresno EOC contributes an amount equal to five percent (5%) of each employee's compensation during the Plan year. Employees may, but are not required to, make voluntary contributions to the Plan in an amount not to exceed ten percent (10%) of their compensation during the Plan year. All amounts contributed may not exceed the limitations set forth in Section 415 of the Internal Revenue Code.

Accrued benefits derived from contributions made by Fresno EOC are immediately vested and non-forfeitable at all times. Employee accounts will be increased by investment earnings and decreased by any investment losses.

II. ELIGIBILITY

Employees become eligible to participate in the Pension Plan after they have completed two (2) years of service without an intervening break in service and have attained twenty-one (21) years of age. For purposes of determining eligibility for participation in the Plan, a "year of service" shall mean a consecutive twelve (12) month period commencing on the date on which the employee is employed and during which the employee completes not less than one thousand (1,000) hours of service.

III. ENROLLMENT IN THE PLAN

Employees who are eligible will be notified of their eligibility and will automatically be enrolled in the Plan. At this time employees may sign up to have voluntary contributions made to the Plan. Employees are required to complete a Beneficiary Designation form.

IV. DISTRIBUTION OF FUNDS

An employee may request distribution of funds within thirty (30) days (or ninety (90) days after the end of the plan year to receive income earned for the previous year) when either of the following events occur: (1) retirement, (2) termination of employment, or (3) permanent and total disability.

Terminating employees may elect to stay in the plan if their benefits are in excess of \$3,500, or they may elect to have a rollover made into a qualified plan which will accept a rollover.

V. RETIREMENT BENEFITS

Retired participants age sixty-five (65) or older may elect to receive a monthly, quarterly, or annual installment. Distribution of benefits must commence no later than April 1 of the calendar year following the calendar year in which a participant attains age seventy and one-half (70½).

VI. AMENDMENTS/TERMINATION OF THE PLAN

Fresno EOC reserves the right to amend the Pension Plan. No Plan amendment can reduce a participant's interest in the vested account balance, nor divert any portion of Plan assets to any purpose other than the payment of retirement benefits or defraying reasonable trust expenses. The Board of Commissioners of Fresno Economic Opportunities Commission has the authority to terminate the Plan by appropriate resolution and amendment. In the event of a Plan termination, a participant's interest in the Plan remains one hundred percent (100%) vested and non-forfeitable, and the participant's interest will be distributed as if the participant had terminated employment prior to retirement.

Element L: Attendance Alternatives

“The public school attendance alternatives for pupils residing within the school district ~~that~~ who choose not to attend charter schools.” Education Code Section 47605(~~cb~~)(5)(L).

Requiring students to attend a charter school is prohibited by State law; therefore, enrollment in the School of Unlimited Learning is voluntary.

The public school attendance alternatives for pupils not choosing to participate in the charter school are:

- The nearest district public school.
- Other public schools within the district through intra-district transfer.
- Other public schools outside the district through inter-district transfer.

Students have no right to admission in a particular school of a local education agency as a consequence of enrollment in the School of Unlimited Learning, except to the extent that such a right is extended by the local education agency.

Element M: Rights of Employees

~~"A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school".~~ California Education Code Section 47605(~~cb~~)(5)(M).

The Fresno Economic Opportunities Commission is solely responsible for the hiring of all charter school staff, the setting of qualifications consistent with this charter, and the establishment and administration of employee compensation scales and benefits. Any Fresno Unified employee who leaves employment to work at the charter school will not have return rights to Fresno Unified School District.

Element N: Dispute Resolution

"The procedures to be followed by the charter school and the ~~entity granting the charter~~ chartering authority to resolve disputes relating to the provisions of the charter." California Education Code Section 47605(~~bc~~)(5)(N)

If a conflict or dispute arises out of or relating to this charter and if the dispute cannot be settled through direct discussions, the parties agree to first endeavor to settle the dispute in an amicable manner by mediation. In the event that agreement cannot be reached through mediation, the matter is settled by arbitration administered by the American Arbitration Association and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof. The mediation filing fee and expenses of the American Arbitration Association and the mediator be borne equally or as otherwise agreed by the parties.

Fresno EOC/SOUL and the District are encouraged to attempt to resolve any disputes amicably and reasonably without resorting to formal procedures. All Charter School disputes other than disputes between the District and Fresno EOC/SOUL are handled in accordance with the Charter School's own internal policies.

In the event of a dispute between Fresno EOC/SOUL and the District, Fresno EOC/SOUL staff, employees and Board members of the Fresno EOC and the District agree to first frame the issue in written format ("dispute statement") and to refer the issue to the District Superintendent and Chief Executive Officer of Fresno EOC or an appointed designee. In the event that the District Board of Trustees believes that the dispute relates to an issue that could lead to revocation of the charter in accordance with Education Code Section 47607, Fresno EOC/SOUL requests that this is noted in the written dispute statement, although it recognizes it cannot legally bind the District to do so. However, participation in the dispute resolution procedures outlined in this section are not interpreted to impede or act as a pre-requisite to the District's ability to proceed with revocation in accordance with Education Code Section 47607. It is expressly acknowledged that the District's rights pursuant to Education Code Section 47607 supersede this dispute resolution process.

Fresno EOC and Fresno Unified School District designees shall informally meet and confer in a timely fashion to attempt to resolve the dispute, not later than 5 business days from receipt of the dispute statement. In the event that this informal meeting fails to resolve the dispute, both parties will identify two Board members from their respective boards who shall jointly meet with the Superintendent and the Executive Director of Fresno EOC and attempt to resolve the dispute within 15 business days from receipt of the dispute statement.

If this joint meeting fails to resolve the dispute, Fresno EOC and Fresno Unified School District designees shall meet to jointly identify a neutral third party mediator to engage the Parties in a mediation session designed to facilitate resolution of the dispute. The format of the mediation session shall be developed jointly by Fresno EOC and Fresno Unified School District designees. Mediation shall be held within sixty business days of receipt of the dispute statement. The costs of the mediator shall be split equally between the District and Fresno EOC/SOUL. If mediation does not resolve the dispute either party may pursue any other remedy available under the law. All timelines and procedures in this section may be revised upon mutual written agreement of the District and the Fresno EOC/SOUL.

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Element O: School Closure Procedures

~~"A description of T~~the procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of pupil records. If the charter school leases or rents its facility from a related party or subsidiary, as identified in its audited financial statements according to generally accepted accounting principles in the United States, or owns its facility, the charter school shall include a statement describing its plans for the use of the facility in its final audit." California – Education Code Section 47605(cb)(5)(PO)

The following are closing procedures that abide by California Education Code section 47605(cb)(5)(PO), should the School of Unlimited Learning close for any reason. The decision to close the School of Unlimited Learning either by the Fresno Economic Opportunities Commission's (hereafter referred to as Fresno EOC) Board of Commissioners or by the Fresno Unified School District Board will be documented in a closure action. The closure action shall be deemed to have been automatically made when any of the following occurs: the charter is revoked or not renewed by the FUSD Board of Education; Fresno EOC Board of Commissioners votes to close the School of Unlimited Learning; or the charter lapses. In the event of a closure, the following steps are to be implemented:

1. The School of Unlimited Learning and the Fresno EOC Board of Commissioners shall cooperate and assist the District in all matters pertaining to the closure of the School of Unlimited Learning, including, without limitation, working with the District in creating and implementing a Charter School Closure Agreement, attending meetings with the District, Fresno County Office of Education, and/or the State Department of Education, preparing a schedule of closing tasks with dates, obtaining and providing additional information and documentation, and interpreting and explaining any ambiguous records or information.
2. Closure of the School of Unlimited Learning will be documented by official action of the Fresno EOC Board of Commissioners or the Fresno Unified School District Board. The action will identify the reason for closure. The official action will also identify an entity and person or persons responsible for closure-related activities.
3. Fresno EOC/School of Unlimited Learning Board of Commissioners will promptly issue written notification by registered mail to parents/guardians and students of the Charter School, the District, the Fresno County Office of Education, and the California Department of Education of the closure as well as the effective date of the closure. This notice will also include the name(s) of and contact information for the person(s) to whom reasonable inquiries may be made regarding the closure; the pupils' school districts of residence; and the manner in which parents/guardians may obtain copies of pupil records, including specific information on completed courses and credits that meet graduation requirements.

4. Fresno EOC/School of Unlimited Learning will ensure that the written notification to the parents/guardians and students of the Charter School of the closure provides information to assist parents/guardians and students in locating suitable alternative programs. The written notification will also include information on assistance in transferring each student to another appropriate school, and a process for the transfer of all student records.
5. Fresno EOC/School of Unlimited Learning will also develop a list of pupils in each grade level and the classes they have completed, together with information on the pupils' districts of residence, which they will provide to the entity responsible for closure-related activities.
6. Fresno EOC/School of Unlimited Learning shall provide written notification to FUSD of the list of returning students and their home schools, to be made promptly upon the closure action.
7. Fresno EOC/School of Unlimited Learning shall allow the District access, inspection and copying of all school records, including school financial and attendance records, upon written request by FUSD.
8. As applicable, Fresno EOC/School of Unlimited Learning will provide parents/guardians, students and the District with copies of all appropriate student records, including grade reports, discipline records, immunization records, completed coursework, and credits that meet graduation requirements, and will otherwise assist students in transferring to their next school. The process for transferring student records to the receiving schools shall be in accordance with FUSD procedures for students moving from one school to another. Fresno EOC/School of Unlimited Learning shall transfer student records to the receiving schools, within seven calendar days from the determination of an action to close or when parents notify the School of Unlimited Learning of the receiving school. Records of students who have not notified the School of Unlimited Learning in writing of a receiving school will be sent to the student's school of residence. All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act ("FERPA") 20 U.S.C. § 1232g. Fresno EOC/School of Unlimited Learning will ask the District to store and maintain original records of Charter School students. All records of the School of Unlimited Learning shall be transferred to the District upon the School of Unlimited Learning's closure. If the District will not or cannot store the records, Fresno EOC/School of Unlimited Learning shall work with the County Office of Education to determine a suitable alternate location for storage.
9. All state assessment results and special education records will be transferred to and maintained by the entity responsible for closure-related activities in accordance with applicable law.

10. As soon as reasonably practical, Fresno EOC/School of Unlimited Learning will prepare final financial records. Fresno EOC/School of Unlimited Learning will also have an independent audit completed within six months after the School of Unlimited Learning's closure. Fresno EOC/School of Unlimited Learning will pay for the final audit. This final audit can also function as the annual audit. The audit will be prepared by a qualified Certified Public Accountant selected by Fresno EOC. The audit will be conducted using Accounting Principles generally accepted in the United States of America. The audit will be provided to the District promptly upon its completion. The final audit will include an accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value, an accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation, and an assessment of the disposition of any restricted funds received by or due to Fresno EOC/School of Unlimited Learning. To the extent the Charter School leases or rents its facility from a related party or subsidiary, as identified in its audited financial statements according to generally accepted accounting principles in the United States, or owns its facility, the Charter School shall include a statement describing its plans for the use of the facility in its final audit.
11. Fresno EOC/School of Unlimited Learning will complete and file any annual reports required pursuant to Education Code section 47604.33.
12. On closure of the charter school, Fresno EOC/School of Unlimited Learning shall dispose of any and all net assets of the School of Unlimited Learning remaining after all liabilities of the charter school have been paid or otherwise addressed in accordance with the provisions of this section. The disposition of the School of Unlimited Learning's assets shall include, but not be limited to, the following dispositions:
 - All assets of the School, including but not limited to leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by students attending the School, remain the sole property of the Fresno Economic Opportunities Commission and shall be distributed in accordance with the Articles of Incorporation or Bylaws upon the dissolution of the non-profit public benefit corporation.
 - Any liability or debt incurred by the School of Unlimited Learning will be the responsibility of the Fresno Economic Opportunities Commission and not the District. The School of Unlimited Learning understands and acknowledges that the Fresno EOC/School of Unlimited Learning will cover the outstanding debts or liabilities of the Charter School. Fresno EOC/School of Unlimited Learning understands and acknowledges that only unrestricted funds will be used to pay creditors.

- Any assets originally acquired from the District or District property will be promptly returned upon the School of Unlimited Learning's closure to the District.
 - The return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports.
 - The return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.
13. On closure, Fresno EOC/School of Unlimited Learning shall remain solely responsible for all liabilities arising from the operation of the Charter School. The District shall not assume, in any way, responsibility or liability for any debts, obligations, or liabilities of the School of Unlimited Learning, including, without limitation, liability for any and all claims, damages, losses, causes of action and demands, including reasonable attorneys' fees and costs, liability for claims of any employees for unpaid wages or other damages, liability for "start-up" loans received by the School of Unlimited Learning, "bridge" loans received by the School of Unlimited Learning, liability for personal injury or property damage, or liability to any vendors, lessors, creditors, or parents.
 14. As the School is operated by a non-profit public benefit corporation, should the corporation dissolve with the closure of the School, the Board will follow the procedures in the non-profit public benefit corporations Bylaws and as set forth in the California Corporations Code for the dissolution of a non-profit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.
 15. For six calendar months from the closure action or until budget allows, whichever comes first, sufficient staff as deemed appropriate by Fresno EOC Board of Commissioners will retain employment to take care of all necessary tasks and procedures required for a smooth closing of the school and student transfers.

This Element O shall survive the revocation, expiration, termination, or cancellation of this charter or any other act or event that would end the School of Unlimited Learning's right to operate as a charter school or cause the Charter School to cease operation. Fresno EOC/School of Unlimited Learning and District agree that, due to the nature of the property and activities that are the subject of this petition, the District and public shall suffer irreparable harm should charter school breach any obligation under this Element O. The District, therefore, shall have the right to seek equitable relief to enforce any right arising under this Element O or any provision of this Element O or to prevent or cure any breach of any obligation undertaken, without in any way prejudicing any other legal remedy available to the District. Such legal relief shall include, without limitation, the seeking of a

temporary or permanent injunction, restraining order, or order for specific performance, and may be sought in any appropriate court.

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V. ADDITIONAL PROVISIONS

Financial Planning, Reporting, and Accountability

Governing Law: The petitioner or petitioners also shall ~~also~~ be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cash-flow and financial projections for the first three years of operation. Education Code Section 47605.6(h)

Attached, as Appendix A, please find a detailed five-year budget that includes revenue and expense projections, plus monthly cash-flows for one year, and an explanation of the assumptions used in preparing the budget. These documents are based upon the best data available to the Petitioners at this time.

The Charter School shall provide reports to the authorizer as follows, and may provide additional fiscal reports as requested by the authorizer:

- By July 1, ~~an annual update required~~ a local control and accountability plan pursuant to Education Code Section 47606.5.
- By December 15, an interim financial report for the current fiscal year reflecting changes through October 31. Additionally, on December 15, a copy of the Charter School's annual, independent financial audit report for the preceding fiscal year shall be delivered to the chartering ~~authorizer~~, County, State Controller, California Department of Education and County Superintendent of Schools.
- By March 15, a second interim financial report for the current fiscal year reflecting changes through January 31.
- By September 15, a final unaudited report for the full prior year. The report submitted to the authorizer shall include an annual statement of all the Charter School's receipts and expenditures for the preceding fiscal year.

Impact Statement Operation and Civil Liability Effects of Charter School/Facilities

Governing Law: ~~The county board of education shall require that the petitioner or petitioners provide information regarding P~~potential civil liability effects, if any, upon the charter school, any school district where the charter school may operate and upon the ~~county board of education~~ school district. Education Code Section 47605.6(h)

The School of Unlimited Learning (SOUL) is operated by Fresno Economic Opportunities Commission (Fresno EOC) a large non-profit community action program within the meaning of Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701(d).

Pursuant to Education Code Section 47604(de), an entity that grants a charter to a charter school operated by or as a non-profit public benefit corporation shall not be liable for the debts or obligations of the charter school or for claims arising from the performance of acts, errors or omissions by the charter school if the authority has complied with all oversight responsibilities required by law. Fresno EOC/ SOUL shall work diligently to assist the authorizer in meeting any and all oversight obligations under the law, including monthly meetings, reporting, or other authorizer-requested protocol to ensure the authorizer shall not be liable for the operation of the Charter School.

Further, the Charter School and the authorizer may enter into a memorandum of understanding, wherein the Charter School shall indemnify the authorizer for the actions of the Charter School under this charter.

The bylaws of Fresno EOC/SOUL Charter School shall provide for indemnification of the Charter School's Board, officers, agents, and employees, and the Charter School has purchased general liability insurance, Board Members and Officers insurance, and fidelity bonding to secure against financial risks. As stated above, insurance amounts will be determined by the recommendation of the insurance company of the Fresno Economic Opportunities Commission.

The Fresno EOC Board of Commissioners has instituted appropriate agencywide risk management practices as discussed herein, including screening of employees, establishing codes of conduct for students, and dispute resolution.

Facilities

Governing Law: "The facilities to be used by the charter school. The description of the facilities to be used by the charter school shall specify where the charter school intends to locate." Education Code Section 47605(h)

The School of Unlimited Learning is located in at 2336 Calaveras St. This facility is leased from the Fresno EOC Sanctuary and includes approximately 15,000 square feet of indoor space. There are six classrooms, seven offices, one cafeteria and a theater/auditorium. SOUL's lease is renewed annually.

Special Education Local Plan Area (SELPA)

As outlined in Element A, "Serving Students with Disabilities" SOUL is compliant with all applicable state and federal laws in providing services to students with disabilities, including Section 504 of the Rehabilitation Act, the Americans with Disabilities Act (ADA), the Individuals with Disabilities in Education Improvement Act (IDEIA) and all other civil rights enforced by the U.S. Department of Education Office of Civil Rights. Furthermore, SOUL complies with all the provisions of AB 602, applicable SELPA guidelines, and additional federal and state laws that apply to it pertaining special education students. SOUL functions as a public school of the District for purposes of

providing special education and related services pursuant to Education Code Section 47641(b). It complies with all state and federal laws related to the provision of special education instruction and services and all SELPA policies and procedures, and utilize appropriate SELPA forms. SOUL is solely responsible for its compliance with Section 504 and the ADA. The SOUL campus is accessible for all students with disabilities. Students with disabilities who enroll in SOUL shall be provided services as outlined in the MOU with the Fresno Unified School District. As its own LEA and member of Fresno Unified's SELPA, SOUL works in cooperation with all local and state agencies to ensure that a free and appropriate education is provided to all students with exceptional needs.

Per federal law, all students with disabilities are fully integrated into the programs of SOUL, with the necessary materials, mandated services, and equipment to support their learning. SOUL meets all the requirements mandated within a student's Individual Education Plan (IEP). SOUL includes all special needs students with non-disabled peers to the maximum extent appropriate according to their IEPs.

Administrative Services

Governing Law: ~~The county board of education shall require that the petitioner or petitioners provide information regarding t~~The manner in which administrative services of the charter school are to be provided. Education Code Section 47605-6(h)

SOUL receives all of its administrative services including, but not limited to, financial management, human resources, payroll, etc., through Fresno County Economic Opportunities Commissions doing business as Fresno Economic Opportunities Commission.

Insurance

As a program of Fresno Economic Opportunities Commission, SOUL has general liability, workers compensation, excess liability, and other necessary insurance of the types and in the amounts required for a county-wide agency of similar purpose and circumstance.

Coverage amounts are based on recommendations provided by the Agency's third party insurance broker which are then approved by the CEO and Board of Commissioners.

VI: Required Appendices:

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**2018-2023
SCHOOL OF UNLIMITED LEARNING
Multi-Year Projection**

CHARTER NAME: School of Unlimited Learning

CHARTERING AUTHORITY: (if applicable) Fresno Unified School District

UNRESTRICTED (Resources 0000-1999)

REVENUES AND OTHER FINANCING SOURCES

		2018/2019	2019/2020	2020/2021
Revenue Limit Sources	8010-8099	2,294,218	2,435,702	2,569,593
Federal Revenues	8100-8299	27,300	0	0
Other State Revenues	8300-8599	27,360	27,360	24,519
Other Local Revenues	8600-8799	7,000	7,000	7,000
Other Financing Sources	8910-8999	0	0	0
Total, Revenues		2,355,916	2,470,062	2,601,112

EXPENDITURES AND OTHER FINANCING USES

Certificated Salaries	1000-1999	983,519	1,055,625	978,265
Classified Salaries	2000-2999	344,388	352,986	361,050
Employees Benefits	3000-3999	390,675	400,650	401,426
Books and Supplies	4000-4999	39,550	43,527	70,756
Services, Other Operating Expenses	5000-5999	107,784	757,274	834,815
Capital Outlay	6000-6999	0	0	0
Other Outgo (excl. Direct Support/Indirect Costs)	7000-7999	0	0	0
Direct Support/Indirect Costs	7300-7399	0	0	0
Other Financing Uses	7610-7699	0	0	0
Total, Expenditures		2,356,916	2,470,062	2,601,112
Net Increases/(Decreases) in Fund Balance		0	0	0

FUND BALANCE

Net Beginning Fund Balance	9791	616,343	516,313	516,343
TOTAL, Ending Fund Balance	9790	616,343	616,313	616,343

DISTRICT BUDGET ASSUMPTIONS:

Revenue Assumptions:

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Expense Assumptions:

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**2018-2023
SCHOOL OF UNLIMITED LEARNING
Multi-Year Projection**

RESTRICTED (Resources 2000-9999)		2018/2019	2019/2020	2020/2021
REVENUES AND OTHER FINANCING SOURCES				
Revenue Limit Sources	8010-8099	-	0	-
Federal Revenues	8100-8299	67,500	67,500	67,500
Other State Revenues	8300-8599	40,000	40,000	42,841
Other Local Revenues	8600-8799	-	-	-
Other Financing Sources	8900-8999	-	-	-
<i>Total, Revenues</i>		<i>107,500</i>	<i>107,500</i>	<i>110,341</i>
EXPENDITURES AND OTHER FINANCING USES				
Certificated salaries	1000-1999	-	-	-
Classified Salaries	2000-2999	48,243	49,445	50,082
Employees Benefits	3000-3999	4,884	15,051	15,223
Supplies	4000-4999	30,000	30,000	30,000
Services, Other, Operating Expenses	5000-5999	14,373	1,004	14,436
Capital Outlay	6000-6999	0	0	-
Other Outgo (excl Direct Support/Indirect Costs)	7100-7299, 7300-7399, 7400-7499	0	0	-
Direct Support/Indirect Costs	7300-7399	0	0	-
Other Financing Uses	7600-7699	0	0	-
<i>Total, Expenditures</i>		<i>107,500</i>	<i>107,500</i>	<i>110,341.00</i>
<i>Net Increases/(Decreases) /ft Fund Balance</i>		<i>0</i>	<i>0</i>	<i>-</i>
FUND BALANCE				
Beginning Fund Balance	9791	0	0	0
TOTAL, f.11d in Fund Balance	9790	0	0	0

DISTRICT BUDGET ASSUMPTIONS:

Revenue Assumptions:

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Expense Assumptions:

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2018-2023
SCHOOL OF UNLIMITED LEARNING
Multi-Year Projection

UNRESTRICTED		2018	2019	2020
REVENUES AND OTHER FINANCING SOURCES		2018	2019	2020
Revenue Limit Sources	8010-8099	2,294,256	2,435,702	2,569,593
Federal Revenues	8100-8299	94,800	0	67,500
Other State Revenues	8300-8599	67,360	07,300	67,300
Other Local Revenues	8600-8799	7,000	7,000	7,100
Other Financing Sources	8910-8999	0	0	0
Total, Revenues		2,463,416	2,577,562	2,711,453
EXPENDITURES AND OTHER FINANCING USES		2018	2019	2020
Certificated Salaries	1000-1999	883,519	905,625	923,265
Classified Salaries	2000-2999	392,631	402,431	412,532
Employees Benefits	3000-3999	405,509	415,701	420,649
Books and Supplies	4000-4999	69,550	73,527	100,756
Services, Other Operating Expenses	5000-5999	712,157	1,802,771	849,251
Capital Outlay	6000-6999	0	0	0
Other Outgo (excl. Direct Support/Indirect Costs)	7100-7299	0	0	0
Direct Support/Indirect Costs	7300-7399	0	0	0
Other Financing Uses	7610-7699	0	0	0
Total, Expenditures		2,463,416	2,577,562	2,711,453
Net Increases/(Decreases) in Fund Balance		0	0	0
FUND BALANCE				
Net Beginning Fund Balance	9791	616,343	616,343	616,343
TOTAL, Ending Fund Balance		616,343	616,343	616,343
COMPONENTS OF ENDING FUND BALANCE:				
Reserve for Revolving Cash	9711	0.00	0.00	0.00
Stores	9712	0.00	0.00	0.00
Prepaid Expenditures	9713	0.00	0.00	0.00
Designated for Economic Uncertainties	9770	0.00	0.00	0.00
Other Designations	9710	0.00	0.00	0.00
Undesignated Amount	9791	0	0	0
Components of Ending Fund Balance		0	0	0

Request for Board Member Information

DRAFT

Fresno Unified School District Request for Board Member Information

Personal Information

Name (First/Initial/Last): Jeff Davis Jr.			
Other Names Used (i.e. Maiden/Former Married): N/A			
Current address: 578 Gateway Ave.			
City: Clovis	State: CA.	Zip Code: 93612	
Daytime Phone: (559) 263-1106	Cell (559) 994-0182	Fax: N/A	
Email: I	Address: Jeff.davis@fresnoroc.org		

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school, you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board members will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school? ☐ Yes ☐ No

Please submit typed responses to the inquiries below:

1. Indicate how you became aware of the charter school and the opportunity to serve as a member of its board, including who invited you to sit on the board.

I became aware of the Advisory Committee through the School Administrator as result of collaborative efforts to expand job readiness/career preparation services and resources for students on the SOUL campus. As a result of these successful efforts, the Administrator submitted my name to the selection committee.

2. Explain why you wish to serve on the board.

I believe that I can assist SOUL and its students with success in navigating their personal, academic and career goals. Additionally, I believe that I can assist the school, Advisory Committee and school staff with school accountability while identifying additional resources necessary to vocational and post-secondary instructional integration into overall school course work.

3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience.

I currently am a member of the School of Unlimited Learning (SOUL) Advisory Committee and have served on this committee for the past 3 years. Additionally, I have routinely served as staff supporting the efforts and mission of additional non-profit boards and committees (Fresno Regional Workforce Development Board and Youth Council).

4. Describe your understanding of the appropriate role of a public charter school board member.

The role of a public charter school board member includes ensuring the fiscal solvency of the school, evaluating the effectiveness of instruction provided to students, ensuring that all state educational codes and policies are adhered to and reviewing and approving school strategic plans associated with quality and content of instructional structure and services.

5. Indicate specifically the knowledge and experience that you would bring to the board.

I have involved in the provision of educational and employment related programs and services for the past 38 years. My experience includes being the Project Director and Director of Employment and Training Services at Fresno EOC for the past 16 years. During that time I have designed programs and elements to facilitate educational and career focused growth of students served, have carried out oversight responsibilities including budget development and management, facilitated staff development and managed overall program performance and accountability.

6. Please provide a forecast of where you see the school in one year and then again in five years.

I envision in one year's time the school will implement a broader approach of designing a school curriculum, with competitive career paths that will attract a greater range of students from diverse socioeconomic backgrounds and geographic areas. Linking curriculum with a particular career pathway focused on local demand areas will provide greater opportunities for our high school youth and, in the end, achieve the greatest results.

Within the next five years I envision that SOUL's mission will shift from a credit recovery school for at-risk students to a career academy that prepares high school students for post-secondary training and employment in high demand jobs. During this expansion SOUL will provide a non-traditional educational setting where students can learn relevant job skills and apply what they have learned in school to the workplace.

7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)?

I would share my belief and reasons for this belief with the Board Chair and School Administrator and request an investigation to determine the validity of my belief.

Conflict of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship. N/A
9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship. N/A
10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business. N/A

11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, owners.

or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship. NIA

12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider. NIA
13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship. NIA
14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts. NIA

Educational Philosophy

15. Please describe your understanding of the school's mission and/or philosophy.

SOUL's mission and philosophy includes being the catalyst to align education with market demand skills and intra agency resources that will prepare high school students for success in today's evolving workforce.

16. Please indicate your level of familiarity with the educational program that the school utilizes.

The School of Unlimited Learning serves at-risk students ages 1-1 through 22, and grades 9 through 12, who have not yet received a high school diploma, many of whom are at high risk of dropping out of school. The majority of SOUL students reside in economically depressed areas within the Fresno metropolitan area. In addition, many of these young men and women arrive at SOUL bearing a history of school transiency, limited connectedness to school, and a lack of educational and career goals. A review of their scholastic career typically indicates a failure to benefit from available support services in a traditional school system, and the need for more comprehensive social services. SOUL offers the presence and support of case managers and trilingual prevention personnel in the classroom-based program, in combination with the individualized learning opportunities offered in the independent study program, which help the students and their families address their social and emotional needs, thus bringing the students to a point where they are better prepared and focused to learn.

17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful?

I believe that the key characteristics of a successful school include a competent and innovative staff, strong leadership, solid school structure including policies and procedures and all necessary resources to address student deficiencies and barriers. I believe the steps necessary to ensuring that the school is successful should include ongoing review of student academic achievement reports, periodic review of student demographics identification of additional resources to support student achievement and direct involvement in the hiring of administrative staff.

Background Information- insert resume here
Include the following information in resume:

- Education History
- Employment History- If applicable, include previous experience with Charter Schools
- Professional Licenses/Credentials
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- fictitious Business Name Affiliations
- Professional References
- If applicable - Arrests and/or Convictions

Authorization to release Information

My signature affirms that all information on this application is true to the best of my knowledge. Further, I authorize all employers, institutions, government agencies and persons named as references to release information for use in establishing my qualifications and credentials for this position: This authorization:

- Remove all liability from those who provide information and verification in response to any information I have stated, in applying on behalf of the above referenced Charter School.
- Releases Fresno Unified School District and any agent acting on its behalf from any and all liability of whatever nature, in releasing or using such information to assess my candidacy on behalf of the above referenced Charter School.
- Is valid during my entire candidacy and during any resulting period of employment with the above referenced Charter School.
- Is an indication of my knowledge and understanding that the information provided in this application will be used to examine my background and my knowing and voluntary agreement to the background information being publicly disclosed as part of the charter petition review and renewal process.
- Is an indication of my understanding that any responses generated by this District will not be confidential and my knowing and voluntary agreement to an open and confidential review.

Signature: 

Name: Jeff Davis Jr.

Position with School Development Team:

Date: 2/13/18

JEFF DAVIS JR.

578 Gateway Ave. | Clovis, Ca. 93612 | (559) 765-4841

SKILLS PROFILE

- ❖ Extensive Planning /Management/Supervisory Skills
- ❖ Proficient Knowledge of Department of Labor Regulations
- ❖ Detailed Budget Preparation and Analysis Skills
- ❖ Good Grant Writing Background
- ❖ Efficient Computer Skills
- ❖ Effective Oral/Written Communication Skills

EMPLOYMENT HISTORY

Fresno Economic Opportunities Commission

2002 - Present

Employment and Training Services Department Project Director/Director

- ❖ Responsible for Division oversight, planning, development and program implementation
- ❖ Regularly develop budgets
- ❖ Review the expenditure of program funds; program performance including outcomes achieved, and any corrective action necessary
- ❖ Responsible for the submission of any required reports
- ❖ Conducting Board/Committee presentations
- ❖ Development and submission of grant funding application/proposals
- ❖ Ensuring adequate and ongoing training of all program staff

Fresno Workforce Development Board

1999- 2002

Youth Services Consultant

- ❖ Responsible for the development of youth service program strategies, systems and resources.
- ❖ Responsible for providing guidance and program oversight to existing youth programs funded under the Workforce Investment Act (WIA)
- ❖ Developed Request For Proposal Competitive Procurement Documents.
- ❖ Developed and maintained youth services provider contracts.

Fresno Economic Opportunities Commission

1980 - 1999

Coordinator/Vocational Counselor

- ❖ Responsible for insuring all program performance standards are met
- ❖ Responsible for provision of services to all participants are adequate
- ❖ Responsible for the timely and appropriate expenditure of all funds associated with the program
- ❖ Career counseling: assessment of participant barriers
- ❖ Enrollment and monitoring of participant in various services
- ❖ Provision of assistance and guidance to other Vocational Counselors

EDUCATION

- ❖ Attended Fresno City College, General Studies
- ❖ Attended California State University of Fresno, Majoring in Social Science

PROFESSIONAL AFFILIATIONS

- ❖ Member of American Legion Post 511
- ❖ Past Member of County of Fresno Court School PTA
- ❖ Member of the Soul Governing Council

PROFESSIONAL REFERENCES

- ❖ Naomi Quijano Mizlino, Fresno EOC Chief Programs Officer
- ❖ Dr. Mark Wilson, Ed.D., Principal, School of Unlimited Learning Charter High School

**Fresno Unified School District
Request for Board Member Information**

Personal Information

Michiel Petrovich, Ph.D.

n/a

3715 W. Fir Ave

Fresno, Ca. 91711

559-974-0730

rx:tm\idimichael!9ti@mna.it.com

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school, you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board members will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school,;,. Yes

Please submit typed responses to the inquiries below.

1. Indicate how you became aware of the charter school and the opportunity to serve as a member of its board, including who invited you to sit on the board. A co-worker at Kaiser Permanente told me about it. We established a relationship with the school principal and case manager to allow psychology interns from Kaiser to do volunteer work at SOUL. I was invited to join the board shortly thereafter. This was about 20 years ago and the internship program with Kaiser and SOUL continues.
2. Explain why you wish to serve on the board. I value the opportunity to participate in supporting the staff's service to the students and parents of SOUL school. These students are often not able to do well in large school systems and benefit from the individualized approach at SOUL. They are often the first to graduate from high school in their family, which is very exciting to witness.
3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience. No, the SOUL Board is the only board I have served on.
4. Describe your understanding of the appropriate role of a public charter school board member. Review the budget, staffing, programming, marketing of the program, and offer feedback to the School and EOC administration on the strengths and weaknesses of the program, so the educational needs of the students can best be served. According to our Bylaws, the governing council reviews all fiscal and programmatic policies and operations of the school. We provide reports and recommendations to the Full EOC Board of Commissioners, which retains the legal responsibility for the programmatic and fiscal operations of the School of Unlimited Learning (SOUL). The council also serves as a liaison between the school and other agencies within the community. The council also recruits new members to serve on the council.

5. Indicate specifically the knowledge and experience that you would bring to the board. I am a licensed psychologist and understand how emotional stress can interfere with learning. I support the schools innovative ways of coaching students on ways of coping with stress in order to better learn the information and skills that will lead to obtaining their high school diploma.
6. Please provide a forecast of where you see the school in one year and then again in five years. Continue to maintain WASC accreditation, improve graduation rates, improve attendance and enrollment. Continue to help disadvantaged youth and their families prepare for life after high school by learning how to learn in this age of increased technology. Continue to excite students about being life long learners, responsible adults, and good citizens. Continue to improve students ability to pass standardized tests, such as the California High School Exit Exam.
7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)?

Contact their supervisors. This would include supervisors with the SOUL school as well as supervisors from the EOC and the Fresno Unified liaison.

Gamet of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship. None
9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship. None
10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business. None
11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, owners, or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship. No
12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider. No
13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship. No
14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts. None

Educational Philosophy

Fresno Unified School District • Request for Board Member Information
of 6

15. Please describe your understanding of the school's mission and/or philosophy. To help students learn how to learn, especially in this increasingly complex, technological society. Also, to help students value the process of learning so they will enjoy and value learning throughout life. SOUL also promotes the value of education for being a prosocial, productive citizen who helps others and develops the skills for moving toward a career after the completion of high school. SOUL teaches effective communication skills and promotes critical thinking ability as well.
16. Please indicate your level of familiarity with the educational program that the school utilizes. The school offers access to the PLATO on line program to help complete credits necessary for graduation and to strengthen reading, math, and writing skills. An independent study program is also offered. Teachers receive training on utilizing a variety of methods to increase student motivation for learning and responsibility for learning. The Explicit Direct Instruction Model is one example of such training for staff development. Common Core training has also been utilized. Training on helping students whose primary language may not have been English in earlier years is also offered. Students receive training on how to take tests and how to prepare for standardized tests is also offered.
17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful? Attendance, parent involvement, skilled and motivated teachers, counselors, and leaders are all essential. Students also need to be in a safe environment where they feel valued and understood as individuals. Learning experiences should meet state and federal guidelines but also be fun and relevant to student interests. A positive peer culture that supports and values learning is also essential.

Resume attached to this document.

Background Information- insert resume here
Include the following information in resume:

- Education History
- Employment History - If applicable, include previous experience with Charter Schools
- Professional Licenses/Credentials
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- Fictitious Business Name Affiliations
- Professional References
- If applicable - Arrests and/or Convictions

Authorization to release information

My signature affirms that all information on this application is true to the best of my knowledge. I further authorize all employer, institutions, government agencies and persons named as references to release information for use in establishing my qualifications and credentials for this position. This authorization:

Removes all liability from those who provide information and verification in response to any information I have stated in applying on behalf of the above referenced Charter School.

Releases Fresno Unified School District and its agent acting on its behalf from any and all liability of whatever nature in requesting or using such information to assess my candidacy on behalf of the above referenced Charter School.

Is valid during my entire candidacy and during any resulting period of employment with the above referenced Charter School.

Is an indication of my knowledge, and understanding that the information provided in this application will be used within my background and my knowing and voluntary agreement to the background information being publicly disclosed as part of the charter petition review and renewal process.

Is an indication of my understanding that any reports generated by the District will not be confidential and my knowing and voluntary waiver of such confidentiality.

Signature:

Name:



Date: 1/15/17

Position with School Development Team:

DRAFT

Michael Petrovich, Ph.D.
Ca. Licensed Psychologist
PSY10178

3715 W. Fir Ave
Fresno, Ca. 93711
559-974-0730

petrovichmichael19@gmail.com

WORK HISTORY:

- Currently, working about 15 hours per week at the Sullivan Center for Children and Adolescents, seeing adults and older adolescents for psychotherapy.
- Currently supervising graduate students in psychology at Alliant University Psychological Service Center, Fresno.
- Currently consulting with the clinical team of the Fresno Vet Center, Fresno, CA.
- 1993-March, 2014- Over these past 20 years, I have worked at Kaiser Permanente Medical Center, Fresno. The following bullet points are highlights.
- From 1993 to 1995, I served as a staff psychologist, working with children, adolescents and adults in both our outpatient psychiatric program and substance abuse program. I also served as Director of Training and began our first predoctoral training program for psychology trainees and interns.
- From 1995 to 2014, I served as Adult Outpatient Team Leader and Chief Psychologist. I continued clinical work with adult outpatients, including individual, group, couples, and family therapy as well as psychological testing. I continued to supervise psychology interns and helped our staff develop an APA approved program for psychology interns.
- My management responsibilities during this time included hiring new staff, doing corrective action with adult staff, as needed, doing staff evaluations, and managing our productivity, accessibility to members, member satisfaction, and adherence to best practices guidelines, as developed by Kaiser. I also served as chair of the peer review committee for many years.
- I often represented the management team during labor/management disputes and learned to utilize interest-based bargaining and problem-solving models specific to working in a union environment.
- Served for many years on an interdisciplinary Physician Well Being Committee.
- Facilitated interdisciplinary case conferences for diagnostic clarification, treatment planning, and treatment coordination.
- Conducted psychiatric emergency consultations in the ER room, had authorization to do 5150 evaluations for patients in Kaiser's ER room.
- Being at Kaiser has allowed me to work with a very diverse population of people with respect to gender, ethnicity, religion, socioeconomic status, and Diagnosis.
- While it is difficult to summarize 20 years of outpatient experience, I believe the aforementioned highlights illustrate the diversity of my administrative, clinical, and supervisory experience during my time at Kaiser Permanente.

- 1990-1993- Private Practice, primarily with adults and adolescents, inpatient and outpatient, as well as some consultation and teaching at Fresno State and the California School of Professional Psychology.
- My initial outpatient private practice with was the Associated Center for Therapy in Fresno. During this time I conducted some fitness for duty evaluations for police and correctional officers as well as doing psychotherapy with adults and adolescents.
- After a few months at ACT, I joined Chann and Chann, Inc., and worked closely with J. Chann, psychiatrist, to coordinate care for outpatients and inpatients, who were hospitalized either at Cedar Vista Hospital or Fresno Community Hospital.
- 1990-91-Adjunct Faculty Member at California School of Professional Psychology, taught personality assessment and supervised psychology interns at the Service Center of CSPP.
- 1990-92 Lecturer at Fresno St., Dept.of Psychology, taught Psychology of Adolescence.
- 1992-94-Worked part time as Director of Psychological Services at Cedar Vista Hospital in Fresno. Supervised psychology interns on psychological assessment, served as president of the professional staff one year, chair of the peer review committee two years, and provided consultation to the administration, nursing staff, and medical staff.
- 1986-i 990-Renaissance Adolescent Center, Fresno Community Hospital. Clinical Supervisor. Provided individual, group, and family therapy for adolescents who were hospitalized for substance abuse problems and or psychiatric problems. Participated in program development, management of staff, and supervision of psychology interns. Worked as part of an interdisciplinary team.
- 1984-1986-Wyandotte General Hospital, Wyandotte, Mi. Worked as a staff psychologist on an adolescent inpatient unit, conducting psychological assessments, individual, group, and family therapy. Worked as part of an interdisciplinary team,
- 1983-1984-Wyandotte General Hospital, Wyandotte, Mi. Worked as a staff psychologist on an adult inpatient unit, conducting psychological assessments, individual, group, and couples therapy. Worked as part of an interdisciplinary team.
- 1982-1983-APA approved internship, Wyandotte General Hospital, Wyandotte, Mi. Worked 6months on and adolescent inpatient unit, 6 months on an adult inpatient unit, saw two outpatients twice per week for the entire year. Conducted psychological assessments on both inpatient units and co-led therapy groups with licensed psychologists, social workers, and attended interdisciplinary case conferences.
- 1980-1981-California Men's Colony-Did research on motivational dimensions of convicted rapists, which later became my doctoral dissertation. Worked with inmates in group therapy, individual therapy, and conducted psychological assessments. This was a two day per week psychological trainee position.

- 1979-1980-Merced County Mental Health On-Site Services, Practicum student. Worked with children, adolescents, and their parents, who were referred by their local school due to behavioral problems at school.
- 1974-1979-Northeast Guidance Center, Detroit, Michigan. I worked as a paraprofessional under the supervision of psychologists, social workers, and psychiatrists, in this comprehensive community mental health center. I did over the phone and walk-in assessments, under their supervision, for people in our area, presented with both psychiatric and substance abuse problems. I co-led a variety of therapy groups with licensed staff and worked with children, adolescents, and adults from a wide range of socioeconomic backgrounds, racial and religious backgrounds.

EDUCATION:

1979-1983

Graduated from the California School of Professional Psychology, Fresno Campus, with a Ph.D., Clinical Psychology, 1983.

Doctoral Dissertation: The Assessment of Motivational Dimensions of Convicted Rapists: Aggression, Control-Power, and Sexual Gratification.

1969-1973

Graduated from St. Joseph's College in Rensselaer, Indiana, with a B.S. in Psychology, 1973.

Spent a year, 1972-1973, at the Merrill-Palmer Institute for Children in Detroit, Mi., as part of my Program at St. Joseph's College.

PUBLICATIONS:

Petrovich, M., Templer, D.L., (1984) Heterosexual molestation of children who later become rapists. Psychological Reports, 54, 810.

References:

Dr. Kathy Sullivan, Ph.D. 559-271-1186
 Dr Bradley Schuyler, Ph.D. 559-227-1977
 Mr. Herman Saretto, LCSW 559-487-5660

Fresno Unified School District Request for Board Member Information			
Personal Information			
Name (First/Middle/Last): Terry W. Allen			
Other Names Used (i.e. Maiden/Former Married):			
Current address: 645 E. Champlain Dr. # 139			
City: Fresno		State: California Zip Code: 93730	
Daytime Phone: 559-2997-9591		Cell	Fax
Email Address: Ten-yalien417@cloudcom			

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school, you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board members will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school? ☒ Yes ☐ No

Please submit typed responses to the inquiries below:

1. Indicate how you became aware of the charter school and the opportunity to serve as a member of its board, including who invited you to sit on the board.
In about 2002, the principal of SOU!, whom I knew through his wife, my vice principal at an elementary school, asked me if I would serve. I said yes.
2. Explain why you wish to serve on the board.
I believe that many students, for whatever reason, don't function well in a regular public school setting. I feel it is imperative that they be offered an alternative education to meet their particular needs.
3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience.
I have served on the board of CemerStage, Clovis community theater. I served for approximately 15 years. I feel that I have the knowledge of some of the needs and processes of a non-profit. I served as president and secretary of the organization and worked very closely with the treasurer.
4. Describe your understanding of the appropriate role of a public charter school board member.
I understand that a public charter school is to have a theme that is unique for its students. In this case it is geared for those who struggle with regular school. Some have themes of arts or science or technology or other.
5. Indicate specifically the knowledge and experience that you would bring to the board.
I worked 35 years in Clovis Unified as a teacher, GJS, district office assistant, learning director and elementary school principal. 18 years in the latter position.
6. Please provide a forecast of where you see the school in one year and then again in five years.

I expect SOUL to continue its successful run and graduate its high percentage of students. I expect to see more technology and arts included in the curriculum. As for 5 years from now, I hope to see the school increase its population to accommodate more students in this outstanding program. I realize that size of the facility is an issue, so perhaps a different venue.

7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)?
I wouldn't hesitate to alert the principal. I would expect the principal to investigate and take appropriate action.

Conflict of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship. *N/A*
9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship. *N/A*
10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business. *N/A*
11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, owners, or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship.
At this point, no knowledge of this.
12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider. *N/A*
13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship. *N/A*
14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts.
I see no future conflict.

Educational Philosophy

15. Please describe your understanding of the school's mission and/or philosophy.

16. Please indicate your level of familiarity with the educational program that the school utilizes.
I was on the WASC committee that thoroughly identified the program of the school in 2017. My level of familiarity is high.

17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful?
*The key characteristic of a successful school is to meet the needs of the students. This includes having personal connections with students so that the issues that they have had in regular school can be dealt with. Communications with parents are essential. The curriculum must have enough accommodations that the student will understand and grasp the content. Most of all, the curriculum must be **relevant** to the student.*

Background Information- insert resume here
 Include the following information in resume:

- Education History
- Employment History - If applicable, include previous experience with Charter Schools
- Professional Licenses/Credentials
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- Fictitious Business Name Affiliations
- Professional References
- If applicable - Arrests and/or Convictions

Authorization to release Information

My signature affirms that all information on this application is true to the best of my knowledge. Further, I authorize all employers, institutions, government agencies and persons named as references to release information for use in establishing my qualifications and credentials for this position. This authorization:

- *Removes all liability from those who provide information and verification in response to any information I have stated in applying on behalf of the above referenced Charter School.*
- *Releases Fresno Unified School District and any agent acting on its behalf from any and all liability of whatever nature in requesting or using such information to assess my candidacy on behalf of the above referenced Charter School.*
- *Is valid during my entire candidacy and during any resulting period of employment with the above referenced Charter School.*
- *Is an indication of my knowledge and understanding that the information provided in this application will be used to examine my background and my knowing and voluntary agreement to the background information being publicly disclosed as part of the charter petition review and renewal process.*
- *Is an indication of my understanding that any reports generated by the District will not be confidential and my knowing and voluntary waiver of any such confidentiality.*

Signature:

Name: Terry W. Allen, Ed.D.

Position with School Development Team: Secretary, Governing Council

Date: 2/12/18

RESUME

Terrill (Terry) Wayne Allen
645 E. Champlain Drive #139
E-mail: terryallen417@icloud.com
Cell: 559-287-9591

Educational Training

Ed. D. in School Management	University of LaVerne	1994
M.A. in School Administration	CSU, Fresno	1977
B. A. in French/Social Science	CSU, Fresno	1963

Since I have retired, many of the following are not happening. Note dates after each one:

Current Positions and Responsibilities

- Producing and being featured in PBS's local KVPT art program of 13. "Art Is..."; now on-line
- Arts Education Consultant to the Bonner Family Foundation and the Fresno Art Museum's ArtSmart professional development program 2005-2016
- Member of Education Committee at the Fresno Art Museum of Fresno. Until 2016
- Instructor at CSU, Fresno, in the Student Teaching Program and Cal State TEACH Program providing instruction/professional development to teachers in the visual and performing arts standards - until 2015
- Member of the Governing Council of the School of Unlimited Learning charter school in Fresno County under EOC. Serving on Charter Renewal Committee
- Member, Executive Board of CenterStage, Clovis Community Theatre
- State Secretary California Art Education Association-2010-2014
- Instructor in the Teaching Fellows Grant at CSU Fresno for After-School Programs-2000-2015
- Interim Director of Admissions for the Multiple Subjects Credentialing Program at Fresno Pacific University 2012 to present

Administrative Experience

Elementary School Principal	Clovis Unified School District -- Liberty, Clovis Primary, Cole, and Temperance-Kutner Elementary Schools	1982-2000
Learning Director		
District Resource Teacher	CUSD-- Clark Intermediate School	1979-1982
Site Resource Teacher	CUSD -- Blue Unit	1977-1979
	CUSD -- Sierra Vista Elementary	1973-1979

Teaching Experience

CSU, Fresno	Instructor at CSU, Fresno, Administrative Credentialing program--Site-Based Leadership; Supervision of Instruction: Instructor, Visual and Performing Arts Curriculum and Instruction, Fieldwork supervisor	1995- 2010 2001-2013
National University	Curriculum and Instruction	1987-1996
Danforth Program, CSU, Fresno	Instructor in Clinical Supervision	1994
University of San Francisco	Leadership in School Management	1991
Classroom Teacher	Regular and summer school classes, all subjects in elementary school 1-8	1966-1975
Peace Corps Volunteer	English as a Second Language in Senegal. West Africa	1963-1965

Other Significant Roles/Responsibilities

Presenter	California Art Education Association Conference	2006, 2010-2012
Presenter	Teacher workshop in visual arts for K-6 Sanger Unified teachers	2006
Coordinator	California Arts Initiative for Fresno County	2006-07
Representative	Arts Lead to the State Department of Education representing the Fresno County Office of Education	2000-06
Mentor	Keeping Score, a SF Symphony project in Fresno County	2005-07
Writer/administrator	ArtsWork Gram for Fresno Co. Office of Education 2002-04-TCAP Trainers used	2002-04

Consultant	Central Unified School District K-8 ArtsWork Grant--professional development to K-8 teachers in the visual arts standards and social studies standards 2002-04	2000-03
Consultant	Tuolumne County Office Education-- "Artists in Residence" trainer	1999
California Art Education Association	Presenter at conferences in Sacramento, Bakersfield, Fresno, San Jose, Riverside	1989-2012
Board of Directors, Center Stage: Clovis Community Theater	Past President, Secretary	1999-present
African Exhibit and Conference at Fresno Metropolitan Museum	Steering committee and presenter	1996
Fresno Co. Office of Education	Arts Lead representative to California Department of Education	1999-2008
Discipline-Based Art Education Institute	Coordinator/Presenter at Academy of Art in Honolulu, HI, Coordinator/Presenter at CSU Fresno DBAE/Getty Institute	1989 and 1991 1989-2004
Clinical Supervision	Clovis Unified School District trainer of administrators	1991-1997
Program Quality Review	Lead Reviewer	1986
<u>Honors/Awards</u>		
Certificated Management Employee of the Year	Clovis Unified School District	1996
Brick on the Educators' Wall of Fame at CSU Fresno	Presented by the Bonner Family foundation	2002
Arts Administrator of the Year for the State of CA	California Art Educators Association	2004
Noted Alumni Award for contributions to field of education	Kremen School of Education and Human Development, CSU Fresno	2004
Horizon Ordorfer Award as Outstanding Arts Educator	Fresno Arts Council	2006
Writer, Recipient and teacher of national ADK art-in-the-classroom grant at Manchester GATE Elementary School		2007-08
Retirement from the public school system		2000
<u>Specialized Training Skills</u>		
Clinical Supervision	Extensive training in Instructional Theory into	

	Practice (Madeline Hunter) at Seattle Pacific University
Fluent in French language	
Categorical Programs	Proposal and budget preparation, selection and purchase of project materials, selection and training of project personnel at the site level, and supervision of all the preceding from the district level
Professional Development	Organizing professional development programs based on needs assessments, conducting professional development sessions for elementary and secondary teachers as well as for fellow administrators, and demonstration teaching.
Curriculum Development	Participation in the establishment of grade-level objectives and desired exit skills. the development of criterion reference tests, alignment of curriculum materials to curricular standards
Group Facilitation	Three years of training and practice in facilitation of groups through problem-solving, decision-making, and reaching consensus
Discipline-Based Art Education	Twenty-five years of training and teaching in the visual arts with the following components: art history, art criticism. art production, and aesthetics; helping to organize, budget, and conduct annual two-week institutes in cooperation with the Getty Museum for the training of teachers in the DBAE concept

Credentials/Certificates Held

General Administration
 General Elementary
 General Secondary
 Standard Elementary
 Standard Secondary
 English Language Development

**Fresno Unified School District
Request for Board Member Information**

Personal Information

Name (First/Middle/Last): Jeanne Ann Hermann Starks

Address: 6611 N. Knoll Ave
City: Fresno State: CA Zip Code: 93711
Daytime Phone: (559) 435-6167 Cell: (559) 31942 Fax: N/A
Email Address: jstarks@fresno.k12.ca.us

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board member will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school? Yes- ☒ No- ☐

Please attach responses to the inquiries below:

1. Indicate how you became a part of the charter school and the opportunity to serve as a member of its board, including who invited you to sit on the board.
In 1998, as a Probation Officer with the Fresno County Probation Department I was asked to represent the Department on what was originally the Probation Pride council. I have continued to serve on the Governing Council.
2. Explain why you wish to serve on the board.
The last 15 years prior to my retirement as a probation officer, I worked in the Juvenile Justice System. I have always felt an affinity for the youth of this community, and especially for the students in SOUL School.
3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience.
When my daughter was in kindergarten and first grade, I sat on the Forkner Elementary School Site Council.
4. Describe your understanding of the appropriate role of a public charter school board member.
I and my fellow board members aid Dr. Wilson and school staff in the implementation of a school improvement plan, which improves instruction, services, and the school environment.

5. Indicate specifically the knowledge and experience that you would bring to the board.
I was employed by the Fresno County Probation Department for 35 years until my retirement in 2013. As a DPO, I worked in all three divisions; in the Department dial. in turn, allowed me to interact with a plethora of people and organizations. I served on multiple community-based committees, as well as in-house committees, all in the purpose of improving services.
6. Please provide a forecast of where you see the school in one year and then again in five years.
When I was first introduced to SOUL the primary focus was to help at-risk students stay in school, graduating, and becoming self-sufficient and contributing adults. Although that continues to be our goal, we now are also encouraging higher education. Our goals are constantly evolving, as are the needs of our students. I hope that in five years SOUL school will be housed in a building, with a larger footprint.
7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)?
I would immediately bring it to the attention of Dr. Wilson.

Conflict of Interest

8. If you, your spouse or other immediate family members know any of the other board members; prior to being invited to sit on the board, please so indicate and describe the relationship.
Not applicable
9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship.
Not applicable
10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business.
Not applicable
11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, owners, or agents of that provider. [If your answer is yes, please indicate the individuals you know and the nature of the relationship].
Not applicable
12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider.
Not applicable

U. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship.
N/A applicable

14. Please indicate if you foresee any potential ethical or legal conflicts or interests should you serve on the school's board. If so, describe such potential conflicts.
None.

Educational Philosophy

15. Please describe your understanding of the school's mission and/or philosophy.
"The mission of the School of Unlimited Learning Charter High School is to provide comprehensive learning experiences in a manner and in an environment that enables students to obtain skills, knowledge, and motivation to be self-directed, lifelong learners as they mature toward self-sufficiency."

16. Please indicate your level of familiarity with the educational program that the school utilizes.
As a state charter school, SOUL's curriculum for the core subjects is aligned with state standards. Several years ago, SOUL became an accredited high school. We have a seated program and an independent study program.

17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the school will need to take to ensure that this school is successful?
I believe that the key characteristics of a successful school are quality leadership, having a vision for the school, and implementing the necessary steps to reach that vision. The governing council will continue to meet monthly during the school year and conduct ongoing evaluations.

Background Information - insert resume here **Include the following information in resume:**

- Education History
- Employment History • If applicable, include previous experience with Charter Schools
- Professional Licenses/Credentials
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- Filitious Business Name Affiliations
- Professional References
- If applicable - Arrests; and/or Convictions

Authorization to release information

(559) 435-6167
6611 N. Knoll Avenue
Fresno, CA 93711

Jeanne A. Starks

Experience

- 2013-2018 Fresno Co. Probation Dept.,
Juvenile and Community Partnership, Division
Deputy Probation Officer IV
- Lead officer in Campus Supervision. Repeat Offender Prevention Program (ROPP) and Juvenile Court Investigations.
 - Assisted in grant preparation in ROPP, oversaw grant program operation and reported to the funding agency, as required.
 - Work in a collaborative effort with Fresno Unified School District, auxiliary agencies and concerned persons.
 - Represented the Probation Department as Court Officer in Superior Court Juvenile Division.
 - Member of the SOUL Community Council since 1998.
 - Member of TANE Title IV-E Committee 2000-2013.
 - Member of Early Childhood Help and Outreach (ECHO) Project 2001-2001
- 2001-2001
- Peer Counselor training in San Bernardino County March 1990
 - Member of the Adult Interagency Task Force on Homelessness 1988
 - Member of the Fresno Co. Public Information Committee June 1987-May 1993; Auxiliary member October 1993-Present
 - Crisis Communications and the Media training with the California Specialized Training Institute in San Luis Obispo, CA April 1990
- 1987-1995 Fresno Co. Probation Dept., Adult Division
Deputy Probation Officer IV
- Lead Officer in Work Furlough and Victim Services.
 - Assisted in grant preparation in Victim Services.
 - Oral presentations to Media, auxiliary agencies and concerned persons.
 - Worked in a collaborative effort with Fresno Police Department, State Parole and District Attorney's Office.
- 1980-1987 Fresno Co. Probation Dept., Adult Division
Deputy Probation Officer I-III
- Supervision of offenders, execution of court orders, representing the Department in Multidisciplinary and Superior Court, collaboration with community-based agencies.

1977-1978

Fresno Co. Probation Dept., Juv. Hall

Juvenile Hall Counselor

Responsible for the supervision, minor and staff safety, and providing
services and support to institutional program.

Responsible for the supervision and counseling minors detained at
Juv. Hall.

Education

1973-1977

California State University, Fresno, CA

B.S. in Criminal Justice, Cum Laude.

Graduated with Honors.

Interests

- Member of EOC Society of the Inland Empire Governing Council
1998-2008

- Volunteer with the church choir at Antioch of Padua Church

Member of the Forkner Fiber Arts Guild since 2011
since 2016

- Member of the Forkner Elementary School Site Council 1999-2001

- Avid reader and eager traveler

Fresno Unified School District Request for Board Member Information		
Personal Information		
Name (First/Middle/Last): Benita M Wahsington		
Other Names Used (i.e. Maiden/Fonner Married):		
Current address:		
City:	State:	Zip Code:
Daytime Phone:	Cell	Fax
Email Address:		

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school, you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board members will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school? ☒ Yes ☐ No

Please submit typed responses to the inquiries below:

1. Indicate how you became aware of the charter school and the opportunity to serve as a member of its board, including who invited you to sit on the board.
I became aware of the charter school in 1993. Rena Failla invited me to serve on the board.
2. Explain why you wish to serve on the board.
Opportunity to support students.
3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience.
4. Describe your understanding of the appropriate role of a public charter school board member.
To provide oversight and support.
5. Indicate specifically the knowledge and experience that you would bring to the board.
Pupil Personnel Credentials.
6. Please provide a forecast of where you see the school in one year and then again in five years.
7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)?
Inform the appropriate parties.

Conflict of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship.
Previously worked with DR. Wilson, FUSD and Rena Failla.
9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship,
10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business.
11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, owners, or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship,
12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider.
13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship.
14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts.

Educational Philosophy

15. Please describe your understanding of the school's mission and/or philosophy.
To provide a learning experience that enables students to reach their individual full capacity as life long learners.
16. Please indicate your level of familiarity with the educational program that the school utilizes,
I had the opportunity to participate in their accreditation process.
17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful?
*Data Driven decision making.
Strength based engagement with students and their families.
Fairness and equity.
Effective and efficient leadership.
Compassionate and excellent teachers and support staff.*

Background Information- insert resume here
Include the following information in resume:

- Education History
- Employment History - If applicable, include previous experience with Charter Schools
- Professional Licenses/Certifications
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- Fictitious Business Name Affiliations
- Professional References
- If applicable - Arrests and/or Convictions

Authorization to release Information	
<p>I, the undersigned, affirm that the information on this application is true to the best of my knowledge. Further, I authorize the District to release information for use in establishing qualifications and credentials for this position. This authorization:</p> <ul style="list-style-type: none"> • Relates to all information provided in response to any information I have provided in applying on behalf of the above referenced Charter School. • Relates to the District and any person acting on its behalf in any and all liability of whatever nature in releasing or using such information to assess my candidacy on behalf of the above referenced Charter School. • Is valid during my candidacy and during any resulting period of employment with the above referenced Charter School. • Is an indication of my knowledge and understanding that the information provided in this application will be used to determine my background and my knowledge of the District's background information being publicly disclosed as part of the charter petition review process. • Is an indication of my understanding that any report generated by the District will not be confidential to my knowledge. 	
Signature	_____
Name:	Bonita M. Washington
Position with School Development Team:	Date: 2/16/18

--Benita M. Washington-----

Attendance Officer • Fresno Unified School District cont.

Implemented and administered the operation of the Truancy Prevention Program, the Elementary School Counseling Grant, and the Safe Schools Healthy Students Grant, which ultimately resulted in an increase in attendance, multiple School Social Worker positions, and over ten million dollars in funding. Developed the FUSD truancy data base, which was instrumental in collecting and evaluating attendance, suspension, and dropout information of 78,000 students enrolled in district.

Student Assistant Program Counselor, Comprehensive Youth Services, Fresno, CA

February 1997 - March 1998

Responsible for providing counseling services including, but not limited to, completing multidimensional psychosocial assessments, development of comprehensive case plans, provided case management and individual, group and family clinical counseling services formulated to address the social and emotional factors that impacted student academic success.

Medical Social Worker, Mercy Hospital, Bakersfield, CA August 1994 - December 1994

Helped clients navigate the medical setting, identifying support systems and worked collaboratively with interdisciplinary team members. Identified resources specific to the needs of the individual; developed discharge plans that linked clients to social service agencies and other community resources that ensured continued healthy patient recovery.

Social Worker Fresno County, Department of Social Services, Fresno, CA

May 1993 - August 1994

Completed safety assessments of children placed in the foster care system. Also, served as agency witness in court hearings and prepared written reports of observations, assessments, and services offered to families for Family Court. Responsible for interpretation of child welfare laws, policies, procedures, and regulations governing social service programs to families, staff, and the public.

Lecturer, California State University Fresno August 2012 - Present

Taught a general systems approach focused on the interaction of biological, psychological, social and cultural/spiritual phenomena with individuals, small groups, complex organizations, and communities. beginning level social work strategies and skills working with small systems, including individual, families and small groups. Focused on problem identification, beginning steps of intervention, and the evaluation of practice. Through a process of active learning, questioning, observing, reflecting and practicing, students are expected to acquire professional generalist social work practice competencies necessary for entry level employment upon graduation.

Parenting Class Facilitator Nurturing Parenting Program 1996-1998

Taught parenting classes offered at no charge in partnership with the Fresno County Department of Social Services and Fresno Adult School. Curriculum included lecture, group discussion, videos, handbook, and handouts that focused on discipline with clear and fair rules, effective communication skills, and how to address negative feelings.

4. Describe your understanding of the appropriate role of a public charter school board member. We provide oversight and professional guidance on all aspects of the SOUL School including curriculum, extra-curricular activities, evaluation and review processes, interface with parents and students, and feedback into the budget and funding processes. We also participate in re-accreditation processes. We support school leadership, faculty, students and their families.

5. Indicate specifically the knowledge and experience that you would bring to the board. As social work faculty, I bring knowledge in school educational settings, cultural competency, community interface, best practices models in working with at-risk students and their families, and a belief in the resiliency of students and their families. Finally, I bring a sincere passion for students in education and a belief in their ability to succeed.

6. Please provide a forecast of where you see the school in one year and then again in five years. SOUL School continues to thrive in support of their students, high graduation rates, high percentage of students accessing higher education (community colleges) and a wide array of sports and community service projects for the students. In one year I see this continuing to flourish while in five years I see them in a larger facility with more students. I have always seen SOUL as a best practice model where students succeed!

7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)? In my practice, and having taught the Social Work course on Ethics, I would discuss this concern involving conflict of interest with the Board Chair and Principal, as I would view this behavior as unprofessional and unethical. The Board Chair and Principal would further explore this incident to gather pertinent facts and to render a recommendation.

Conflict of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship. After joining the board, I learned that the Board Chair, at the time, was the husband of a colleague and faculty member. Neither my husband nor I knew of any other board members prior to being invited to serve on the board.

9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship. Neither my husband nor I knew of any prospective school employees at SOUL.

10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business. Neither my husband, nor myself knew of anyone that plans to do business with SOUL.

11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, managers, or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship.

Neither my husband, nor myself was aware of any educational service provider proposing to partner with SOUL.

12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider.

Neither my husband, nor myself have any direct or indirect ownership, employment, contractual or management interest as an educational service provider.

13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship.

Neither my husband nor other relative anticipate conducting any business with SOUL.

14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts.

I do not foresee any potential ethical or legal conflict of interest as I serve on SOUL's School Board.

Education Philosophy:

15. Please describe your understanding of the school's mission and/or philosophy.

My understanding of SOUL's mission is to provide a supportive educational environment where students can be successful and thrive. Their philosophy is to provide positive support of the students in all aspects of the curriculum which includes close attention to post graduate connections in higher education as well as immediate employment opportunities. Their philosophy includes a positive interface with the community they live in and cultural activities which build self-esteem and pride are an important aspect of this school setting as well as partnership with parents.

16. Please indicate your level of familiarity with the educational program that the school utilizes.

As a board member we receive monthly updates on all aspects of the educational program and having participated on the recent re-accreditation process I have become very familiar with the overall program and curriculum utilized at SOUL.

17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful?

I believe the key characteristics of a successful school lie in the success of the students. There needs to be a core belief in the student's ability to succeed stemming from leadership, faculty, students, involvement of parents, and connection to the community. SOUL's connectedness to EOC provides additional support and constant involvement in its success. Leadership, social work support and faculty caring and competence provide the structure and excellence in assuring student success. Specific steps to assure the continuation of this school include the continuing leadership and management staff, including social work support and continued support of teaching staff to keep abreast of effective teaching models. Finally, continued belief in student empowerment process will assure success.

Background Information • insert resume here
Include the following information in resume:

- Education History
- Employment History-- If applicable, include previous experience with Charter Schools
- Professional Licenses/Credentials
- Professional Affiliations (Corporate Positions, Board Positions, etc)
- Fictitious Business Name Affiliations
- Professional References
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Authorization to release Information	
<p>My signature certifies that all information on this application is to the best of my knowledge. Furthermore, I authorize all employment, institutions, government agencies, and persons named herein to release information for use in establishing qualifications and credentials for this position; This authorization:</p> <ul style="list-style-type: none"> • Removes all liability from those who provide information and verification, in response to any information I have stated in applying on behalf of the above referenced Charter School. • Releases Fresno Unified School District and any agent acting on its behalf from any and all liability or whatever claim in requesting or using such information to release my candidacy on behalf of the above referenced Charter School. • Is valid during my term (and during and after my term) resulting in no conflict with the Charter School. • Is an indication of my knowledge and understanding that the information provided in this application will be used to examine my background and any knowledge and voluntary agreement to the background information being publicly disclosed as part of the charter petition review and renewal process. • Is an indication of my understanding that any release of information generated by this District will not be confidential and my knowing and voluntary waiver of any such confidentiality. 	
Signature: _____	I
Name: _____	
Position with School Development Team: _____	
Date: 2/14/18	

Corinne L Florez, MSW. PPSC
Retired from California State University, Fresno
Department of Social Work Education

Corinne L Florez, MSW, PPSC

Degree Information

- a Master of Social Work (MSW)
California State University, Fresno
Pupil Personnel Services Credential 1992- Present
- e Master of Social Work - Clinical Emphasis June, 1978
- " Bachelor of Arts- Child Development, June 1975

Academic appointments

- o Title IV-E Child Welfare Liaison & Coordinator
California State University, Fresno 1992-2015

Post-baccalaureate and Post-master's social work degree practice

- Researched
Fresno County Housing Authority, 1976
- e Medical Social Worker (Neonatal, Emergency, Oncology)
Valley Children's Hospital. 1978--1980
- o Administrative Assistant
EOPS-California State University, Fresno. 1980
- o Faculty Liaison - Project Smile
Department of Social Work Education, CSU, Fresno, 1992
- e Faculty Liaison - Title IV-E Child Welfare Program
DSWE, CSU, Fresno Foundation, 1993-1997
- " Title IV-E Child Welfare Coordinator
DSWE, CSU, Fresno, 1997-2015

Professional, academic, community-related, and scientific memberships.

- Board Member - SOUL (School of Unlimited Learning)
- Board Member - Centro la Familia
- Board Member - Transitions Family Foster Services
- Member - Fowler Improvement Association
- Latino Social Work Network (Past Vice President)
- Fresno County Cultural Competence Committee (Past Member)
- Fresno County CWDA Children's Committee (Past Member)
- Past Board Member - Fresno County Mental Health Board
- Encourage Tomorrow's Advisory Board (Past)
- CSU, Fresno Mentoring Program (Past)
- CalSWEC Project Coordinator's Committee (Past)

Fresno Unified School District Request for Board Member Information	
Personal Information	
Name (First/Middle/Last): Corinne L Florez	
Other Names Used (i.e. Maiden/former Married): Corinne Elise Licon	
Current address: 996 Ahronian Ave.	
City: Fowia	State: <input type="checkbox"/> CA Zip Code: 9625
Daytime Phone: (519) 340-6	
E-mail Address: corinne@fowia.com	

Serving on a public charter school board is a position of great trust and responsibility. As a board member of a public school, you are not only ultimately responsible for the education of all students enrolled in the school, but also entrusted with the obligation to see that the public monies which are given to the charter school are legally and wisely spent.

By providing the requested information, prospective board members will assist the Board of Education in determining if the application demonstrates that the school will be run in a financially, organizationally and educationally sound manner.

Will you be at least eighteen years old by January 1 of the year in which you plan to serve as a board member for the charter school? ☒ Yes ☐ No

Please submit typed responses to the inquiries below:

1. Indicate how you became aware of the charter school and the opportunity to serve as a member of its board, including when invited to sit on the board.
I am retired from Fresno State, Department of Social Work Education, where I served as faculty liaison to Interns from both the undergraduate and graduate program, placed at SOUL. After several years of being field liaison, I was asked by Ms. Rena Fahlila, SOUL's School Social Worker and Field Instructor to submit interest in joining this board. Because I was already extremely impressed by the support and leadership demonstrated in this school, setting I welcomed the opportunity to serve on this board.

2. Explain why you wish to serve on the board.
As a faculty of the Social Work Department and professional social worker with PPSC Credentials, coupled with a genuine interest in youth in the educational system, I wanted to "give back" and provide and requested feedback in the capacity as board member. I was impressed with the positive attitude of Rena, the leadership, and faculty as they worked with their students. In short, they care about their students and I was interested in being part of this supportive atmosphere.

3. Please indicate if you have previously served on a board of a school district or a not-for-profit corporation (including the board of a non-public school) and describe any relevant experience.
This was my first experience in serving on a school board, however, I had served on and continue to serve on a select group of non-public school/non-profit boards:
Fresno County Mental Health Board - Previous board member for several years.
Encourage Tomorrow -- Preview; board member
Transitions Foster Family Agency- Was a founding member and continue to serve (7 years)
Centro la Familia Agency - Have served 5 years and continue to serve.

4. Describe your understanding of the appropriate role of a public charter school board member. We provide oversight and professional guidance on all aspects of the SOUL School including curriculum, extra-curricular activities, evaluation and review processes, interface with parents and students, and feedback into the budget and funding processes. We also participate in re-accreditation processes. We support school leadership, faculty, students and their families.

5. Indicate specifically the knowledge and experience that you would bring to the board. As social work faculty, I bring knowledge in school educational settings, cultural competency, community interface, best practices models in working with at-risk students and their families, and a belief in the resiliency of students and their families. Finally, I bring a sincere passion for students in education and a belief in their ability to succeed.

6. Please provide a forecast of where you see the school in one year and then again in five years. SOUL School continues to thrive in support of their students, high graduation rates, high percentage of students accessing higher education (community colleges) and a wide array of sports and community service projects for the students. In one year I see this continuing to flourish while in five years I see them in a larger facility with more students. I have always seen SOUL as a best practice model where students succeed!

7. How would you handle a situation in which you believe one or more members of the school's board are involved in self-dealing (working for their own benefit or the benefit of their friends and family)? In my practice, and having taught the Social Work course on Ethics, I would discuss this concern involving conflict of interest with the Board Chair and Principal, as I would view this behavior as unprofessional and unethical. The Board Chair and Principal would further explore this incident to gather relevant facts and to render a recommendation.

Conflict of Interest

8. If you, your spouse or other immediate family members knew any of the other board members prior to being invited to sit on the board, please so indicate and describe the relationship. After joining the board, I learned that the Board Chair, at the time, was the husband of a colleague and faculty member. Neither my husband nor I knew of any other board members prior to being invited to serve on the board.

9. If you, your spouse or other immediate family members know any people already known to be prospective school employees, please so indicate and describe the relationship. Neither my husband nor I knew of any prospective school employees at SOUL.

10. If you, your spouse or other immediate family members know anyone that plans to do business with the school, please so indicate and describe the relationship and the nature of the potential business. Neither my husband, nor myself knew of anyone that plans to do business with SOUL.

11. If the school proposes to partner with an educational service provider (a management company), please indicate if you, your spouse or other immediate family members know any employees, managers, or agents of that provider. If your answer is yes, please indicate the individuals you know and the nature of the relationship.

Neither my husband, nor myself was aware of any educational service provider proposing to partner with SOUL.

12. If the school proposes to enter into a contract with an educational service provider, please indicate whether you, your spouse or other immediate family member have a direct or indirect ownership, employment, contractual or management interest in the educational service provider.

Neither my husband, nor myself have any direct or indirect ownership, employment, contractual or management interest as an educational service provider.

13. Please indicate if you, your spouse or other relative (by marriage or blood) anticipate conducting any business with the educational service provider, the school, or both. If so, please describe the potential relationship.

Neither my husband nor other relative anticipate conducting any business with SOUL.

14. Please indicate if you foresee any potential ethical or legal conflicts of interests should you serve on the school's board. If so, describe such potential conflicts.

I do not foresee any potential ethical or legal conflict of interest as I serve on SOUL's School Board.

Education Philosophy:

15. Please describe your understanding of the school's mission and/or philosophy.

My understanding of SOUL's mission is to provide a supportive educational environment where students can be successful and thrive. Their philosophy is to provide positive support of the students in all aspects of the curriculum which includes close attention to post graduate connections in higher education as well as immediate employment opportunities. Their philosophy includes a positive interface with the community they live in and cultural activities which build self-esteem and pride are an important aspect of this school setting as well as partnership with parents.

16. Please indicate your level of familiarity with the educational program that the school utilizes.

As a board member we receive monthly updates on all aspects of the educational program and having participated on the recent re-accreditation process I have become very familiar with the overall program and curriculum utilized at SOUL.

17. Please describe what you believe to be the key characteristics of a successful school. What specific steps do you think the board of the school will need to take to ensure that this school is successful?

I believe the key characteristics of a successful school lie in the success of the students. There needs to be a core belief in the student's ability to succeed stemming from leadership, faculty, students, involvement of parents, and connection to the community. SOUL's connectedness to EOC provides additional support and constant involvement in its success. Leadership, social work support and faculty caring and competence provide the structure and excellence in assuring student success. Specific steps to assure the continuation of this school include the continuing leadership and management staff, including social work support and continued support of teaching staff to keep abreast of effective teaching models. Finally, continued belief in the student empowerment process will assure success.

**FRESNO ECONOMIC OPPORTUNITIES COMMISSION
BOARD OF COMMISSIONERS**

RESOLUTION APPROVING SUBMISSION OF MATERIAL REVISION

WHEREAS, the Board of Commissioners ("Board") of Fresno Economic Opportunities Commission ("Fresno EOC") is the nonprofit public benefit corporation that operates School of Unlimited Learning (the "Charter School") a charter school authorized by the Fresno Unified School District (the "District");

WHEREAS, the Board has reviewed a request for material revision ("Material Revision") and supporting documentation to clarify the Charter School's operation of a 100% independent study-based program and to remove text from the Charter School's charter regarding the operation of a classroom-based program;

WHEREAS, the Board finds that the Material revision is in furtherance of Fresno EOC's educational and charitable purposes, and best reflects the interests and needs of the communities Fresno EOC and the Charter School serves;

THEREFORE, BE IT RESOLVED, that the Board authorizes submission of the request for Material Revision and supporting documentation the District;

RESOLVED, FURTHER, that the Board identifies the Lead Petitioner for the Material Revision to be Emilia Reyes, Chief Executive Officer; and

RESOLVED, FURTHER, that the Board authorizes Ms. Reyes to sign the Material Revision request, affirmations and declaration, certificate of completeness, and any other documents related to the Material Revision, and to otherwise act on behalf of Fresno EOC and the Charter School with respect to the material revision process, including working with the District on the details of the submission, and authorizes Ms. Reyes to amend the Material Revision based on the best interests of Fresno EOC and the Charter School.

AYES:

NAYS:

ABSTAIN:

CERTIFICATE OF SECRETARY

I certify that I am the duly elected and acting secretary Fresno EOC, a California nonprofit public benefit corporation, and that the foregoing resolutions were adopted by the Board of Directors on _____ [insert day], [year].

Executed on _____ [insert day], [year] at Fresno, California.

[insert name], Board Secretary

CERTIFICATION OF COMPLETE CHARTER PETITION

Education Code Section 47605(b)

A request for material revision of a charter petition is deemed received by the governing board of the school district on the day the petitioner submits the proposed revised petition to the district office, along with a signed certification that the petitioner deems the petition to be complete. The following certification is submitted in compliance with Education Code Section 47605(b).

No later than 60 days after receiving a petition, the governing board of the school district shall hold a public hearing on the provisions of the charter, at which time the governing board of the school district shall consider the level of support for the petition by teachers employed by the school district, other employees of the school district, and parents. Following review of the petition and the public hearing, the governing board of the school district shall either grant or deny the charter within 90 days of receipt of the petition, provided, however, that the date may be extended by an additional 30 days if both parties agree to the extension.

- Date of submission:
- Deadline for public hearing:
- Deadline for granting or denying the charter petition:

Certification

By signing below, I certify as follows:

1. That I am the authorized representative of School of Unlimited Learning, and that I am competent and qualified to certify to the facts herein;
2. That, as the authorized representative, I have personal knowledge of the facts forming the basis of this certification;
3. That I make this certification for purposes of Education Code Section 47605(b) only; and
4. That I deem the charter petition to be complete.

Name: Emilia Reyes, Chief Executive Officer, Fresno Economic Opportunities Commission

Signature:

Date:

School Name: School of Unlimited Learning



BOARD OF COMMISSIONERS MEETING

Date: March 18, 2024	Program: N/A
Agenda Item #: 12	Director: N/A
Subject: 2024 Committee Appointments	Officer: Emilia Reyes

Recommended Action

Staff recommends review and approval of the 2024 Committee Appointments.

Background

Per the agency's Bylaws and Policies and Procedures,

ARTICLE X. COMMITTEES: *"Committee members and Chairs shall be appointed by the Board Chair and be approved by the Board and shall serve at the pleasure of the Board."*

Committee members will serve a one-year term. Should a committee member leave the board in December after the end of his/her term, the remaining members of the committee remain empowered to carry out the work of the committee.

Fiscal Impact

Action on this agenda item will have no fiscal impact.

Conclusion

If approved by the Board, these Committee Appointments will be carried out for the 2024 calendar year. If not approved, the agency will not be in compliance with the agency Bylaws.

2024 COMMITTEE APPOINTMENTS

EXECUTIVE	Oliver Baines Robert Pimentel Amy Arambula Lisa Mitchell Charles Garabedian	Earl Brown Alysia Bonner Linda Hayes Jimi Rodgers
AUDIT	<i>*The audit Committee shall be composed of the Executive Committee members*</i>	
BY-LAWS		Lisa Mitchell (Chair) Linda Hayes David Ruiz Luis Martinez Zina Brown-Jenkins
EPLUS		Emilia Reyes Oliver Baines Robert Pimentel Bruce McAlister
COMMUNITY ACTION FUND (60th Anniversary)	Barigye McCoy Charles Garabedian Lupe Jaime-Mileham Alysia Bonner	Daniel Martinez Daniel Parra Rey Leon
FOSTER GRANDPARENTS ADVISORY BOARD		Luis Martinez Alena Pacheco Zina Brown-Jenkins
HEAD START		Amy Arambula James Martinez Zina Brown-Jenkins Jimi Rodgers Steven Taylor
LCC ADVISORY BOARD		David Ruiz Brian King Manuel Romero Lisa Mitchell Earl Brown
SANCTUARY ADVISORY BOARD		Brian King James Martinez Rey Leon
SOUL GOVERNING COUNCIL		Jimi Rodgers Steven Taylor Bruce McAlister

Updated: 01.24.24



March 18, 2024

CEO REPORT

2024 Management and Leadership Training Conference

In February, I attended and presented at the 2024 Management and Leadership Training Conference in Las Vegas. I represented Fresno EOC and presented on the unique challenges and opportunities faced by rural communities where mission and financial sustainability intersect.

Fresno EOC Welcomes new Program Officer

Fresno EOC is delighted to welcome Sherry Neil as the newest Programs Officer, responsible for overseeing various departments including LCC, Training & Employment, and Advance Peace.

School of Unlimited Learning Blood Drive

SOUL organized a successful annual blood drive for Black History Month. Students heard presentations from Dr. Robert K. Mitchell, President of UNCF Fresno, and Director of Medical Services at Fresno State, and Dameane Douglas, a former wide receiver for the Philadelphia Eagles and Field Representative for Assembly Member Dr. Joaquin Arambula.

Sequoia Head Start receives a 5-star rating

Our Head Start Sequoia site recently received a 5-star rating, proving that our Head Start sites are meeting standards at the highest quality.

Advancing Fresno County Guaranteed Income

Starting March 15, 2024, Advancing Fresno County Guaranteed Income will go live. Two community forums are planned for Saturday March 16, 2024 at Franklin Head Start (93706 zip code) and Tuesday March 26, 2024 at the John Palacios Community Center in Huron (93234 zip code).

CEO and Director's Meeting

I met with all of the program Director's for a breakfast on March 1st to hear their thoughts, ideas, and perspectives to the development of our organizational culture, which is 2024 agency-wide priority. Director's requested to continue meeting on a bi-weekly basis.

2024 Community Needs Assessment

On March 5, 2024 up until April 5, 2024 the community can now access the Community Needs Assessment. The 2024 Community Needs Assessment will help identify current strengths, needs, and ideas for future services in the community.

All-Staff Conference

On March 15, 2024 Fresno EOC will host its All-Staff Conference. All 1,100+ staff will come together for a day celebrating the work we do. This year's theme is "Journey to Wellness- Healthy Mind, Healthy Body, Healthy Community."

Annual Board Training

The Board of Commissioners along with Executive Leadership came together for the annual Board Training. The training day included sessions on Board of Commissioners Roles and Responsibilities, Ethics Training, Community Needs Assessment, and an overview of the 2024 Agency-Wide Priorities.

Executive Meeting Recap

The Executive Committee met on March 4th, where CEO updates were provided. Highlights include transitioning from BoardEffect to SharePoint for materials, launching a Community Needs Assessment, and announcing the All Staff Conference on March 15th. Budget hearings start next week, and the CFO transition was discussed, with Jay Zapata leaving on April 5th.

Resource and Career Fair in Mendota

On Friday, April 5, 2024, the Human Resources Department will host a resource and career fair for the Mendota community. Attendees will learn about career opportunities and available resources provided by Fresno EOC.

Spring Family Fun Fest

Saturday April 27, 2024 Fresno EOC will host a Spring Family Fun Fest at Mosqueda Park. The goal is to unite the community, bringing them resources, food, games and music.

SOUL 25th Anniversary

Fresno EOC's School of Unlimited Learning (SOUL) marks its 25th anniversary. On April 5, 2024, from 12:30 to 3:00 PM, the public is invited to join school featuring community resources, food, and family-friendly activities.

Media Mentions

Fresno EOC Taps Nuvve (NASDAQ: NVVE) To Transition To An EV Fleet Without Taxing The Powergrid In \$16 Million Deal

<https://finance.yahoo.com/news/fresno-eoc-taps-nuvve-nasdaq-140000575.html>

<https://www.prnewswire.com/news-releases/nuvve-wins-16m-project-for-fresno-economic-opportunities-commissions-50-shuttle-fleet-302041515.html>

Advanced Peace honors 'Change Agents' who work to make Fresno safer

<https://www.yourcentralvalley.com/news/eyewitness-news-this-morning/advanced-peace-honors-change-agents-who-work-to-make-fresno-safer/>

Applications open for Fresno EOC's Low-Income Home Energy Assistance Program

[Applications open for Fresno EOC's Low-Income Home Energy Assistance Program - ABC30 Fresno](#)

Fresno EOC School of Unlimited Learning hosts first blood drive

ABC 30

SOUL community blood drive to celebrate Black History Month

KMPH FOX26

<https://kmpfh.com/news/local/soul-blood-drive-to-celebrate-black-history-month-dr-charles-h-drew-community-blood-drive-central-california-blood-center-inaugural-fresno-eoc-fresno-chapter-united-negro-college-fund>

[Fresno school celebrates Black History Month with blood drive | YourCentralValley.com | KSEE24 and CBS47 Fresno CA](#)

ABC30: ["New guaranteed income program in Fresno County"](#)

KSEE24: ["If eligible, you can receive \\$500 in Fresno County"](#)

Fresnoland: ["Guaranteed basic income programs coming to Fresno County this summer. Here's who can apply."](#)

Fresno Bee: ["Fresno program to give unrestricted monthly cash payments to families. Do you qualify?"](#)Spanish audience

The Sun: Fresno EOC announces universal basic income pilot program
<https://sjvsun.com/news/fresno/fresno-eoc-announces-universal-basic-income-pilot-program/>

Univision: ["Ayuda de 500 dólares mensuales para familias de bajos ingresos al centro de California"](#)

Vida en El Valle: Fresno program will give unrestricted monthly payments to families. You qualify?
<https://www.fresnobee.com/vida-en-el-valle/noticias/article286137736.html>

Telmundo: Residentes elegibles del condado Fresno podrán recibir \$500 durante 12 meses; te decimos cómo <https://www.telemundofresno.com/noticias/local/fresno-te-decimo-si-calificas-para-recibir-500-por-12-meses/2202954/>

The Business Journal: [Guaranteed basic income program coming to Fresno County this summer. Here's who can apply.](#)
<https://thebusinessjournal.com/guaranteed-basic-income-program-coming-to-fresno-county-this-summer-heres-who-can-apply/>

CPUC unanimously approves new PG&E rate hike to cover wildfire mitigation projects
<https://abc30.com/pg-e-rate-hike-cpuc-california-wildfires-bill/14501504/> (LIHEAP Mentioned in video, that was sent separately)