

**AGENDA  
REGULAR MEETING  
BOARD OF DIRECTORS  
Insight at San Joaquin  
December 9, 2024  
11:00 A.M.**

ORIGINAL

**Primary Location:**

**Zoom Meeting:** <https://zoom.us/j/6274679928>

**Conference call: (720) 707-2699**

**Meeting ID: 627 467 9928**

**Alternate Locations:**

31400 S. Koster Road, Tracy, CA 95304

3041 Lombard Street, Lodi, CA 95242

2917 Rosewood Drive, Lodi, CA 95242

**INSTRUCTIONS FOR PRESENTATIONS TO  
THE BOARD BY PARENTS AND CITIZENS**

The Insight at San Joaquin ("School") welcomes your participation at the School's Board meetings. The purpose of a public meeting of the Board of Directors ("Board") is to conduct the affairs of the School in public. We are pleased that you are in attendance and hope that you will visit these meetings often. Your participation assures us of continuing community interest in our School. To assist you in the ease of speaking/participating in our meetings, the following guidelines are provided.

1. Agendas are available to all audience members at the door to the meeting or by requesting the agenda from the School Office (805-581-0202). You may also email [carobinson@caliva.org](mailto:carobinson@caliva.org).
2. "Requests to Speak" forms are available to all audience members who wish to speak on any agenda items or under the general category of "Oral Communications." Speakers may also request to be placed on "Speakers List" by calling the School Office (805-581-0202) or emailing [carobinson@caliva.org](mailto:carobinson@caliva.org) seventy-two hours in advance of the meeting.
3. The "Oral Communications" portion is set-aside for members of the audience to raise issues that are not specifically on the agenda. However, due to public meeting laws, the Board can only listen to your issue, not respond or take action. These presentations are limited to three (3) minutes and total time allotted to non-agenda items will not exceed fifteen (15) minutes. The Board may give direction to staff to respond to your concern or you may be offered the option of returning with a citizen-requested item.
4. With regard to items that are on the agenda, you may specify that agenda item on your blue request form and you will be given an opportunity to speak for up to five (5) minutes when the Board discusses that item.
5. When addressing the Board, speakers are requested to state their name and address from the podium and adhere to the time limits set forth.
6. Citizens may request that a topic related to school business be placed on a future agenda by submitting a written request at least seventy-two (72) hours in advance of any regular meeting. Once such an item is properly agendized and publicly noticed, the Board can respond, interact, and act upon the item.





*Insight at San Joaquin does not discriminate on the basis of age, race, creed, color, sex, national origin, religion, gender, physical or mental disability, ancestry or marital status, in any of its policies, procedures of practices. In compliance with the Americans with Disabilities Act (ADA) and upon request, Charter School may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Individuals who require appropriate alternative modification of the agenda in order participate in Board meetings are invited to contact Insight at San Joaquin office at (805)581-0202.*

**I. PRELIMINARY**

**A. CALL TO ORDER**

Meeting was called to order by the Board Chair at 11:02 A.M.

**B. ROLL CALL**

	Present	Absent
Mr. Fred Vallerga (Secretary/Treasurer)	<u>  X  </u>	<u>      </u>
Ms. Deanna Vallerga	<u>  X  </u>	<u>      </u>
Mr. Jason Jones	<u>  X  </u>	<u>      </u>

**C. FLAG SALUTE**

- Jehlia led (12<sup>th</sup> grade student)

**II. COMMUNICATIONS**

A. ORAL COMMUNICATIONS: Non-agenda items: no individual presentation shall be for more than three (3) minutes and the total time for this purpose shall not exceed fifteen (15) minutes. Ordinarily, Board members will not respond to presentations and no action can be taken. However, the Board may give direction to staff following a presentation.

B. For Information: Director’s Report

This is a presentation of information which has occurred since the previous Board meeting.

- We had 31 of 36 potential graduates for the 1<sup>st</sup> trimester
- Enrollment is currently at 461; 86 in 9<sup>th</sup>, 111 in 10<sup>th</sup>, 116 in 11<sup>th</sup>, and 148 in 12<sup>th</sup>
- 24 students already enrolled for next trimester

C. For Information: Board/Staff Discussions

Board and staff discuss items of mutual interest.

D. Approval of Previous Board Meeting Minutes

Moved: Deanna  
2<sup>nd</sup>: Fred

APPROVED

**III. CONSENT AGENDA ITEMS**

All matters listed under the consent agenda are considered by the Board to be routine and will be approved/enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board votes on them. The



director recommends approval of all consent agenda items.

- **Recognition of resignation from Bill Bushman**

Moved: Deanna

2<sup>nd</sup>: Fred

- 3 ayes

**IV. SCHEDULED FOR ACTION**

**A. BUSINESS**

FY 2023-24 Audit Certification

- Melinda from GHJ shared summary. The ADA corrections were made internally but the school is not able to report to CDE until the window opens in February 2025.

APPROVED

BDRPT 01

APPROVED

FY 2024-25 First Interim Budget Update

- No questions asked.

BDRPT 02

APPROVED

Ratification of Disbursements

- Viva La Pasta and Red Robin were for administrative luncheons.

BDRPT 03

APPROVED

Revised Arts, Music, and Instructional Materials Block Grant Plan

- There are no requirements on percentages spent in each category.

BDRPT 07

**B. PERSONNEL**

None

**C. INSTRUCTION AND CURRICULUM**

Comprehensive School Safety Plan

- No questions asked.

APPROVED

BDRPT 05

**D. PUPIL SERVICES**

None

**V. ITEMS SCHEDULED FOR INFORMATION**

None

**VI. ADJOURNMENT**

The meeting was adjourned at 11:26 A.M.





**From:** [Bill Bushman](#)  
**To:** [Robinson, Casey \(CAVA Admin\)](#)  
**Subject:** Resignation from School Board  
**Date:** Thursday, October 31, 2024 8:55:48 AM

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CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Casey,

I have already alerted Kimberly, but it is with regret I need to formally resign from the school board.

I have really enjoyed my time the past two years, but I am simply too busy in my professional and personal life at this time.

This is such a great school board. I will miss all of you. Let me know if you require anything else.

Regards,

Bill



**TO: INSIGHT AT SAN JOAQUIN  
GOVERNING BOARD**

**APPROVED**

**BOARD REPORT # 01**

**VIA: INSIGHT STAFF**

December 9, 2024

**SUBJECT:** Fiscal Year 2023-24 Audit Certification

**PROPOSAL:**

It is proposed that the Governing Board of Insight at San Joaquin approve the attached audit certification.

**BACKGROUND:**

Each board member was provided a copy of the fiscal year 2023-24 annual audit conducted by Green Hasson and Janks LLP for their review. The result of the audit was fair, and the independent auditors have issued their unmodified opinion on the school's financial statements. The financial statements present fairly, in all material aspects, the financial position of the Organization as of June 30, 2024.

Green Hasson and Janks LLP has identified a state compliance finding related to Insight at San Joaquin's Annual ADA. The School made corrections to Annual ADA after the original submission and was unable to submit the corrections to CDE; the details of which are further discussed in the attached audited financial statements. The attached certification verifies for the public record that the Board has received the audit report.

**BUDGET IMPLICATIONS:**

There are no budget implications.

**RECOMMENDATIONS:**

It is recommended that the Governing Board approve the certification as presented.

**RESPECTFULLY SUBMITTED**

Kimberly Odom  
Head of School





**PREPARED BY:**

Kimberly Odom  
Head of School

Francis "Paco" Burke  
Chief Business Official

**PRESENTED BY:**

Kimberly Odom  
Head of School

Francis "Paco" Burke  
Chief Business Official

Ayes: 2

No: 0

Abstain: 1

Approved: Yes Witnessed: *Casey Robinson* Date: 12/9/2024

Name	Aye	No	Abstain	Absent	Moved	Second
Fred Vallerga	X				X	
Deanna Vallerga	X					X
Jason Jones			X			



**SCHOOL NAME: Insight at San Joaquin**

In accordance with Education Code section 41020.3, the Governing Board must review and accept the prior year's Financial Report/Audit, at a public meeting, on or before December 15 and

THEREBY, as written verification of said review, the Governing Board reviewed and accepted on December 9, 2024, the Annual Financial Report as of June 30, 2024.

\_\_\_\_\_  
(Signature) Head of School

\_\_\_\_\_  
12/9/24

Date





**PRELIMINARY DRAFT**

**December 2, 2024**

TO BE RETURNED TO GREEN HASSON &  
JANKS LLP AND NOT TO BE REPRODUCED  
IN ANY FORM WITHOUT PERMISSION

To the Board of Directors  
Insight @ San Joaquin

We have audited the financial statements of Insight @ San Joaquin (the School) as of and for the year ended June 30, 2024, and have issued our report thereon dated December 9, 2024. Professional standards require that we advise you of the following matters relating to our audit.

**Our Responsibility in Relation to the Financial Statement Audit**

As communicated in our engagement letter dated April 19, 2024, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of its respective responsibilities.

Our responsibility, as prescribed by professional standards, is to plan and perform our audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement. An audit of financial statements includes consideration of the system of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control over financial reporting. Accordingly, as part of our audit, we considered the system of internal control of the School solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

**Planned Scope and Timing of the Audit**

We conducted our audit consistent with the planned scope and timing we previously communicated to you.

**Compliance with All Ethics Requirements Regarding Independence**

The engagement team, others in our firm, as appropriate, our firm, and our network firms have complied with all relevant ethical requirements regarding independence.

**Significant Risks Identified**

We have identified the following significant risks:

- Risk of improper revenue recognition through misallocation of costs to cost reimbursement contracts. This is a presumed significant risk under U.S. generally accepted auditing standards (U.S. GAAS).
- Risk of management override of controls, which is a presumed significant risk under U.S. GAAS.



## **Qualitative Aspects of the School's Significant Accounting Practices**

### **Significant Accounting Policies**

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the School is included in Note 2 to the financial statements. There have been no initial selection of accounting policies and no changes in significant accounting policies or their application during June 30, 2024. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

### **Significant Accounting Estimates and Related Disclosures**

Accounting estimates and related disclosures are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments. There were no such significant accounting estimates affecting the financial statements.

### **Financial Statement Disclosures**

Certain financial statement disclosures involve significant judgment and are particularly sensitive because of their significance to financial statement users. The most sensitive disclosures affecting the School's financial statements relate to functional allocation of expenses, related party transactions and state compliance report.

### **Significant Difficulties Encountered during the Audit**

We encountered no significant difficulties in dealing with management relating to the performance of the audit.

### **Uncorrected and Corrected Misstatements**

For purposes of this communication, professional standards also require us to accumulate all known and likely misstatements identified during the audit, other than those that we believe are trivial, and communicate them to the appropriate level of management. Further, professional standards require us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances or disclosures, and the financial statements as a whole. The attached schedule, **Proposed Adjusting Journal Entries**, summarizes uncorrected financial statement misstatements whose effects in the current and prior periods, as determined by management, are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. Uncorrected misstatements or matters underlying those uncorrected misstatements could potentially cause future-period financial statements to be materially misstated, even though the uncorrected misstatements are immaterial to the financial statements currently under audit.

In addition, professional standards require us to communicate to you all material, corrected misstatements that were brought to the attention of management as a result of our audit procedures. No such misstatements were identified.





**Disagreements with Management**

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the School's financial statements or the auditor's report. No such disagreements arose during the course of the audit.

**Representations Requested from Management**

We have requested certain written representations from management, which are included in the management representation letter dated December 9, 2024.

**Management's Consultations with Other Accountants**

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

**Other Significant Matters, Findings or Issues**

In the normal course of our professional association with the School, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, significant events or transactions that occurred during the year, operating conditions affecting the School, and operating plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as the School's auditors.

This report is intended solely for the information and use of the Boards of Directors and management of the School and is not intended to be and should not be used by anyone other than these specified parties.

GREEN HASSON & JANKS LLP

December 9, 2024  
Los Angeles, California



Client: *Insight @ San Joaquin*  
 Period Ending: *June 30, 2024*  
 Workpaper: *Proposed Adjusting Journal Entries*

Account	Description	Debit	Credit
<b>Proposed Journal Entries JE # 1001</b>			
To adjust SELPA revenues to account for EDCOE Admin Fees.			
56321	Program Fees - Accounting	7,807.00	
47001-280	SPED		7,807.00
<b>Total</b>		<b><u>7,807.00</u></b>	<b><u>7,807.00</u></b>
<b>Proposed Journal Entries JE # 1002</b>			
To update lottery revenues for current year state adjustment related to prior year.			
46001-670	Lottery-R	2,095.00	
46001-680	Lottery-UR	1,096.00	
11850	Program Receivables		3,191.00
<b>Total</b>		<b><u>3,191.00</u></b>	<b><u>3,191.00</u></b>
<b>Proposed Journal Entries JE # 1003</b>			
To adjust SELPA revenues to account for PY 2021-22 adjustments from the SELPA.			
46001-280	SPED	3,241.00	
11850	Program Receivables		3,241.00
<b>Total</b>		<b><u>3,241.00</u></b>	<b><u>3,241.00</u></b>
<b>Proposed Journal Entries JE # 1004</b>			
To record current year impact on K12 invoice credits.			
11020	Due to / from K12	6,432.00	
GHJ 2	K12 Invoice Credits		6,432.00
<b>Total</b>		<b><u>6,432.00</u></b>	<b><u>6,432.00</u></b>
<b>Proposed Journal Entries JE # 1005</b>			
To reclass deferred revenue for Ethnic Studies to prior year.			
23001	Deferred Revenue	5,164.00	
11020	Due to / from K12		5,164.00
<b>Total</b>		<b><u>5,164.00</u></b>	<b><u>5,164.00</u></b>
<b>Proposed Journal Entries JE # 1006</b>			
To reclass overspent balances from receivables as they won't be collectible.			
11020	Due to / from K12	5,892.00	
11850	Program Receivables		5,892.00
<b>Total</b>		<b><u>5,892.00</u></b>	<b><u>5,892.00</u></b>



**PRELIMINARY DRAFT**

**December 2, 2024**

TO BE RETURNED TO GREEN HASSON &  
JANKS LLP AND NOT TO BE REPRODUCED  
IN ANY FORM WITHOUT PERMISSION

**INSIGHT @ SAN JOAQUIN**

(A Non-Profit Organization)

FINANCIAL REPORTS

YEAR ENDED JUNE 30, 2024



**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)

PRELIMINARY DRAFT  
December 2, 2024

FINANCIAL REPORTS  
YEAR ENDED JUNE 30, 2024

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and on Compliance and Other Matters Based on an  
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## **SECTION A**

### Financial Statements



**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)  
FINANCIAL STATEMENTS  
YEAR ENDED JUNE 30, 2024



**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)

PRELIMINARY DRAFT  
December 2, 2024

**FINANCIAL STATEMENTS**  
**YEAR ENDED JUNE 30, 2024**

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## INDEPENDENT AUDITOR'S REPORT

To the Board of Directors  
Insight @ San Joaquin

### **Opinion**

We have audited the financial statements of Insight @ San Joaquin (A Non-Profit Organization) (the School), which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the School as of June 30, 2024, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### **Basis for Opinion**

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Responsibilities of Management for the Financial Statements**

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the School's ability to continue as a going concern for one year after the date that the financial statements are issued.

### **Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and Government Auditing Standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.





In performing an audit in accordance with GAAS and Government Auditing Standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the School's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

#### **Other Matters - Supplementary Information**

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedules of average daily attendance, instructional time and reconciliation of annual financial and budget report with audited financial statements are presented for purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with GAAS and Government Auditing Standards. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

#### **Other Information**

Management is responsible for the other information. The other information comprises the charter school organization structure but does not include the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.



**Other Reporting Required by Government Auditing Standards**

In accordance with Government Auditing Standards, we have also issued our report dated December 9, 2024, on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

GREEN HASSON & JANKS LLP

December 9, 2024  
Los Angeles, California



STATEMENT OF FINANCIAL POSITION  
June 30, 2024

<b>ASSETS</b>	Without Donor Restrictions	With Donor Restrictions	Total
Cash	\$ 1,256,226	\$ 174,220	\$ 1,430,446
Due from Federal, State and Local Governments	742,920	-	742,920
Prepaid Expenses and Other Assets	14,949	-	14,949
<b>TOTAL ASSETS</b>	<b>\$ 2,014,095</b>	<b>\$ 174,220</b>	<b>\$ 2,188,315</b>
 <b>LIABILITIES AND NET ASSETS (DEFICIT)</b>			
<b>LIABILITIES:</b>			
Accounts Payable and Accrued Expenses	\$ 111,733	\$ -	\$ 111,733
Deferred Revenue	642,568	-	642,568
Due to Federal, State, and Local Governments	144,080	-	144,080
Due to K12 California LLC	1,262,187	-	1,262,187
<b>TOTAL LIABILITIES</b>	<b>2,160,568</b>	<b>-</b>	<b>2,160,568</b>
 <b>COMMITMENTS AND CONTINGENCIES</b>			
<b>NET ASSETS (DEFICIT):</b>			
Without Donor Restrictions	(146,473)	-	(146,473)
With Donor Restrictions	-	174,220	174,220
<b>TOTAL NET ASSETS (DEFICIT)</b>	<b>(146,473)</b>	<b>174,220</b>	<b>27,747</b>
<b>TOTAL LIABILITIES AND NET ASSETS (DEFICIT)</b>	<b>\$ 2,014,095</b>	<b>\$ 174,220</b>	<b>\$ 2,188,315</b>

The Accompanying Notes are an Integral Part of These Financial Statements



STATEMENT OF ACTIVITIES  
Year Ended June 30, 2024

	Without Donor Restrictions	With Donor Restrictions	Total
<b>REVENUE AND SUPPORT:</b>			
Revenues from Governmental Agencies:			
State	\$ 4,129,567	\$ 174,220	\$ 4,303,787
Federal	287,051	-	287,051
Other Revenues	14,742	-	14,742
Release for Purpose Restriction	61,524	(61,524)	-
<b>TOTAL REVENUE AND SUPPORT</b>	4,492,884	112,696	4,605,580
<b>EXPENSES:</b>			
Program Services	3,900,666	-	3,900,666
Administrative Support Services	704,914	-	704,914
<b>TOTAL EXPENSES</b>	4,605,580	-	4,605,580
<b>CHANGE IN NET ASSETS</b>	(112,696)	112,696	-
Net Assets - Beginning of Year	(33,777)	61,524	27,747
<b>NET ASSETS (DEFICIT) END OF YEAR</b>	<u>\$ (146,473)</u>	<u>\$ 174,220</u>	<u>\$ 27,747</u>

The Accompanying Notes are an Integral Part of These Financial Statements





**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)

PRELIMINARY DRAFT  
December 2, 2024

**STATEMENT OF FUNCTIONAL EXPENSES**  
Year Ended June 30, 2024

	General Program Services	Special Education & Mental Health Program Services	Supplemental & Concentration Program Services	Elementary and Secondary School Emergency Relief Services (Program)	Title I & II Program Services	Total Program Services	Administrative Support Services	Total
Communication	\$ -	\$ 963	\$ -	\$ -	\$ -	\$ 963	\$ 8,350	\$ 9,313
Instructional Materials and Technology	1,061,162	2,023	35,055	8,281	3,511	1,110,032	-	1,110,032
Insurance	13,586	-	-	-	-	13,586	715	14,301
Leased Equipment	222,752	-	-	-	-	222,752	2,071	224,823
Office Expense	12,209	183	925	-	728	14,045	15,899	29,944
Oversight Fees to District	-	-	-	-	-	-	149,602	149,602
Personnel - Certificated	1,175,116	718,276	201,531	111,505	1,892	2,208,320	-	2,208,320
Personnel - Classified Instructional Support	11,779	11,815	98,373	57,515	47,035	226,517	62,173	288,690
Professional Fees	-	74,271	-	-	-	74,271	45,331	119,602
Support Services Fee	-	-	-	-	-	-	596,809	596,809
Travel and Conference	-	652	7,190	6,657	15,681	30,180	4,747	34,927
K12 Invoice Credits	-	-	-	-	-	-	(180,783)	(180,783)
<b>TOTAL FUNCTIONAL EXPENSES</b>	<b>\$ 2,496,604</b>	<b>\$ 808,183</b>	<b>\$ 343,074</b>	<b>\$ 183,958</b>	<b>\$ 68,847</b>	<b>\$ 3,900,666</b>	<b>\$ 704,914</b>	<b>\$ 4,605,580</b>

The Accompanying Notes are an Integral Part of These Financial Statements



**INSIGHT @ SAN JOAQUIN**

(A Non-Profit Organization)

PRELIMINARY DRAFT

December 2, 2024

**STATEMENT OF CASH FLOWS**

Year Ended June 30, 2024

**CASH FLOWS FROM OPERATING ACTIVITIES:**

Change in Net Assets	\$ -
Adjustments to Reconcile Change in Net Assets Without Donor Restrictions to Net Cash Provided By Operating Activities:	
K12 Invoice Credits	(180,783)
(Increase) Decrease in:	
Due from Federal, State and Local Governments	(213,572)
Prepaid Expenses and Other Assets	60,769
Increase in:	
Accounts Payable and Accrued Expenses	61,370
Deferred Revenue	53,021
Due to K12 California LLC	222,373
<b>NET CASH PROVIDED BY OPERATING ACTIVITIES</b>	<u>3,178</u>
<b>NET INCREASE IN CASH</b>	3,178
Cash - Beginning of Year	<u>1,427,268</u>
<b>CASH - END OF YEAR</b>	<u><u>\$ 1,430,446</u></u>

The Accompanying Notes are an Integral Part of These Financial Statements



NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 1 - ORGANIZATION**

Insight @ San Joaquin (the School) is a non-profit public benefit corporation, which is part of Insight Schools (Insight). The School was founded in July 2015. The School is a virtual public charter school that offers non-classroom based classes to students. Insight programs blend innovative new instructional technology with a traditional curriculum for students all across California. The School has chosen K12 California LLC (K12) as its sole curriculum provider. K12 provides support services as well as technology services to the School. The School is funded principally through the State of California public education monies received through the California Department of Education and its chartering district, the New Jerusalem Elementary School District (the District) in San Joaquin County. The School received majority of its funding from a uniform base grant through the Local Control Funding Formula (LCFF).

In addition to this base grant, the School receives Supplemental and Concentration grants through LCFF, which is based on the number of targeted pupils that are classified as English learners, socio-economically disadvantaged pupils, and foster youth (unduplicated pupils). The School uses Supplemental and Concentration grants to help improve or increase services principally directed towards, and effective in meeting, the School's goals for unduplicated pupils.

The School receives other state and federal funds to provide additional programs and services to students based on certain demographics.

- Special Education funds to help ensure a free appropriate public education for eligible students with disabilities, as well as special education and related services for those students.
- Mental Health funds to deliver educational related mental health services to students with individualized education programs (IEPs), including out-of-home residential services students with development disorders and emotional and behavioral challenges.
- Title I, Part A funds to support effective, evidence-based educational strategies that close the achievement gap and enable the students to meet the state's challenging academic standards.
- Title II, Part A funds to increase the academic achievement of all students by improving teacher and principal quality through professional development and other activities, as well as providing socio-economically disadvantaged students greater access to effective teachers, principals, and other school leaders.





NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 1 - ORGANIZATION** (continued)

- Coronavirus Response and Relief Supplemental Appropriations Act, 2022 (CRRSA Act) Elementary and Secondary School Emergency Relief (ESSER II) funds to be used for the same set of services covered under ESSER I and add activities such as addressing learning loss, preparing schools for reopening, and testing, repairing, and upgrading projects to improve air quality in school buildings.
- The American Rescue Plan Act of 2022 (ARP Act) Elementary and Secondary School Emergency Relief (ESSER III) funds to be used for the same set of services covered under ESSER I and II and add activities such as developing strategies and implementing public health protocols, including, to the greatest extent practicable, policies in line with guidance from the Center for Disease Control for the reopening and operation of school facilities to maintain the health and safety of students, educators, and other staff.

The District has granted the charter to the School through June 30, 2028, subject to amendment and renewal. The School's principal office is located in Simi Valley, California.

**NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**(a) BASIS OF PRESENTATION**

The accompanying financial statements have been prepared on the accrual basis of accounting.

**(b) NET ASSETS**

Net assets, revenues, gains, and losses are presented based on the existence or absence of donor-imposed restrictions. Accordingly, all net assets and changes therein are classified and reported as follows:

- **Net Assets Without Donor Restrictions.** Net assets available for use in general operations and not subject to donor-imposed restrictions.
- **Net Assets With Donor Restrictions.** Net assets subject to donor-imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that the resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both. The School released \$61,524 of net assets with donor restrictions related to LCFF Supplemental and Concentration Grants, with a remaining balance of \$174,220 as of June 30, 2024.



NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

**(c) CASH**

The School maintains its cash in bank accounts which, at times, may exceed federally insured limits. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk.

**(d) MANAGEMENT'S USE OF ESTIMATES**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect reported amounts and disclosures. Accordingly, actual results could differ from these estimates.

**(e) DUE FROM (TO) FEDERAL, STATE AND LOCAL GOVERNMENTS**

Due from (to) federal, state and local governments are recorded based on amounts to be primarily awarded from the California Department of Education which are, in turn, based on the average daily attendance (ADA) of students. The amounts to be awarded are subject to change based on the availability of funds from the State of California. As a result, differences may occur when accruals are estimated because the exact amounts are not available at the time of the accrual. Any changes are recorded in the period that they are estimable.

The carrying value of due from federal, state and local governments, net of the allowance for doubtful accounts, represents their estimated net realizable value. The allowance for doubtful accounts is estimated based on historical collection trends, the age of outstanding amounts due from federal, state and local governments and existing economic conditions. If events or changes in circumstances indicate that specific due from federal, state and local government balances may be impaired, further consideration is given to the collectability of those balances and the allowance is adjusted accordingly. Past due balances are written off when internal collection efforts have been unsuccessful in collecting the amount due. As of June 30, 2024, the School has not established any allowance for doubtful accounts.

Due to federal, state and local governments represent amounts to be returned to the funding agency.





NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

**(f) INCOME TAXES**

The School is exempt from taxation under Internal Revenue Code Section 501(c)(3) and California Revenue and Taxation Code Section 23701(d). There is no unrelated taxable income and, accordingly, no provision for income taxes has been recorded.

In accordance with the Financial Accounting Standards Board's Accounting Standards Codification Topic No. 740, *Uncertainty in Income Taxes*, the School recognizes the impact of tax positions in the financial statements if that position is more likely than not to be sustained on audit, based on the technical merits of the position. During the year ended June 30, 2024, the School performed an evaluation of uncertain tax positions and did not note any matters that would require recognition in the financial statements or which might have an effect on its tax-exempt status.

**(g) REVENUE RECOGNITION**

The School recognizes revenue when cash, other assets or an unconditional promise to give are received. The School reports unconditional promises as restricted support if they are received with donor stipulations that limit the use of the donated assets. Conditional promises to give, that is, those with a measurable performance or other barrier and a right of return, are not recognized until the conditions on which they depend have been met.

Revenue from government contracts and grants may be conditioned upon certain performance requirements and/or the incurrence of allowable qualifying expenses. Such grants are generally considered nonreciprocal transactions restricted by the awarding agencies for certain purposes.

Amounts received are recognized as revenue when the School has satisfied the specific performance requirements, if any, or incurred expenditures in compliance with specific contract or grant provisions, if applicable. The School has elected to adopt a policy whereby donor-restricted grants, whose restrictions are met in the same reporting period, are recognized as revenue without donor restrictions. Amounts received prior to incurring qualifying expenditures or fulfilling the specific performance obligations are reported as deferred revenue in the statement of financial position.



**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2024

**NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

**(h) FUNCTIONAL ALLOCATION OF EXPENSES**

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited by a method that best measures the relative degree of benefit.

**(i) SUBSEQUENT EVENTS**

The School evaluated events and transactions occurring subsequent to the statement of financial position date of June 30, 2024, for items that should potentially be recognized or disclosed in these financial statements. The evaluation was conducted through December 9, 2024, the date these financial statements were available to be issued. No such material event or transactions were noted to have occurred.

**NOTE 3 - COMMITMENTS AND CONTINGENCIES**

**(a) CONTRACTS**

The School's grants and contracts are subject to inspection and audit by the appropriate governmental funding agency. The purpose is to determine whether program funds were used in accordance with their respective guidelines and regulations. The potential exists for disallowance of previously funded program costs.

**(b) LEGAL PROCEEDINGS**

In the ordinary course of conducting its business, the School becomes involved in various claims or proceedings. Some of these proceedings may result in judgments being assessed against the School which, from time to time, may have an impact on changes in net assets. The School does not believe that these proceedings, individually or in the aggregate, are material to the accompanying financial statements.





NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 4 - EMPLOYEE BENEFIT PLAN**

**Multiple-employer Defined Benefit Pension Plan**

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. The risks of participating in this multiple-employer defined benefit pension plan are different from single-employer plans because: (a) assets contributed to the multiple-employer plan by one employer may be used to provide benefits to employees of other participating employers, (b) the required member, employer, and state contribution rates are set by the California Legislature, and (c) if the School chooses to stop participating in the multiple-employer plan, it may be required to pay a withdrawal liability to the plan. The School has no plans to withdraw from this multiple-employer plan.

**State Teachers' Retirement System (STRS)**

**Plan Description**

Certificated employees are members of the State Teachers' Retirement System (STRS), a cost-sharing multiple-employer public employee retirement system defined benefit pension plan administered by the STRS. The School contributes to the STRS and the plan provides retirement, disability and survivor benefits to beneficiaries. Benefit provisions are established by state statutes, as legislatively amended, within the State Teachers' Retirement Law. According to the most recently available Comprehensive Annual Financial Report and Actuarial Valuation Report for the year ended June 30, 2023, total STRS plan net assets were \$317 billion, the total actuarial present value of accumulated plan benefits was \$455 billion, contributions from all employers totaled \$7.8 billion, and the plan was 76% funded. The School did not contribute more than 5% of the total contributions to the plan. Copies of the STRS annual financial reports may be obtained from STRS, 7667 Folsom Boulevard, Sacramento, CA 95826 and [www.calstrs.com](http://www.calstrs.com).

**Funding Policy**

The School reports all applicable information to STRS through the District. Active plan members hired before January 1, 2013 are required to contribute 10.25% of their salary and those hired after are required to contribute 10.205% of their salary. The School is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the STRS Teachers' Retirement Board. The School is required to contribute 19.10% of annual payroll for active plan members for STRS during the year ended June 30, 2024.

The School's contributions to STRS for each of the last three years were as follows:

	<u>STRS Required Contribution</u>	<u>STRS Percent Contributed</u>
<b>Year Ending June 30</b>		
2022	\$ 168,318	100%
2023	201,134	100%
2024	256,215	100%



NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 5 - RELATED PARTY TRANSACTIONS**

- (a) The District charges an amount equal to actual costs of supervisory oversight by the District not to exceed 1% of the School's LCFF revenues, unless the School is able to obtain substantially rent-free facilities from the District, in which case the District can increase charges up to 3% of the School's revenues. During the year ended June 30, 2024, the District provided rent-free facilities to the School, and therefore charged the School 3% for supervisory oversight, administrative and other services, in accordance with the amended memorandum of understanding agreement (MOU) between the School and the District. The total expense incurred for such supervisory oversight, administrative and other services for the year ended June 30, 2024 was \$112,102. The District also receives an additional fee for the services of support staff who will perform duties for the District in support of the School, which amounted to \$37,500 during the year ended June 30, 2024 and was included in oversight fees to District on the statement of functional expenses.
- (b) The School engages in transactions with the other public charter schools including CAVA, Insight and iQ schools. Common expenses such as office expenses and utilities are shared among the CAVA, Insight and iQ schools. The School also shares in teacher expenses for teachers who perform services among multiple schools among the CAVA, Insight and iQ schools. All inter-school receivables and liabilities have been assumed by K12. The net liability as of June 30, 2024 included in Due to K12 California LLC totaled \$314,596.
- (c) K12 charges the School 13% of all revenues received from charter school state funding for support services and 7% for technology services. The total expense incurred for these transactions for the year ended June 30, 2024 totaled \$918,167. K12 also provides curriculum and instructional materials to the School. These transactions amounted to \$727,587 for the year ended June 30, 2024.

In addition, K12 charges monthly fees for office expenses and the lease of instructional computers for students. These instructional computer lease expenses are under month-to-month arrangements and totaled \$229,060 for the year ended June 30, 2024.

Total fees for office and lease expenses for the year ended June 30, 2024 were \$240,170.





**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2024

**NOTE 5 - RELATED PARTY TRANSACTIONS** (continued)

**(c)** (continued)

Under the service agreement between K12 and the School, K12 has committed to provide credits (K12 invoice credits) to be applied to K12 invoices up to the amount necessary to assure the School does not end a fiscal year with a deficit. K12 and the School have established a fee structure that does not bind the parties together beyond an ordinary customer-vendor relationship by agreeing that all K12 invoice credits accumulated through 2016 per the Settlement Agreement and Final Judgement with the State of California, acting through the California Department of Justice, be expunged at the end of every year, and that no K12 invoice credits shall be permanently carried over between fiscal years. In the event the School receives, in a subsequent fiscal year, revenue attributable to a fiscal year in which K12 has already forgiven K12 invoice credits, such subsequently-received funds may be used to compensate K12 for fees incurred under this agreement in such earlier fiscal year. The service agreement also covers various definitions, levels of authority, approvals, and various fiscal responsibilities between K12 and the School. The term of the service agreement between the two parties expires on June 30, 2029.

During the fiscal year ended June 30, 2024, K12 provided K12 invoice credits amounting to \$180,783 against amounts due to K12; resulting in net charges from K12 of \$1,705,141 relating to the above noted expenses. The amounts were treated as a reduction of expenses for financial reporting purposes on the statement of functional expenses.

There was \$1,262,187 due to K12 at June 30, 2024.

**NOTE 6 - EMPLOYEE UNION CONTRACT**

Effective July 1, 2017, the School, along with all other schools within the Insight Schools network, entered into a collective bargaining agreement with California Virtual Educators United (CVEU) to allow all eligible certificated employees of Insight Schools to participate in CVEU's Union, which provides for specified benefits including (but not limited to) specific pay rates and benefits. All Union dues are deducted by the School from participating employees' payroll and remitted to CVEU, subject to the payment terms specified in the collective bargaining agreement. All certificated employees are allocated to each Insight school based on their proportion of student headcount relative to all Insight schools. Since headcount totals, and the resulting certificated employees' payroll and benefits allocations can vary each month, the percentage of the School's labor force covered by the collective bargaining agreement is presented in an aggregate level for all schools within the Insight Schools network. Approximately 57% of the Insight Schools network's labor force is covered by the collective bargaining agreement, which expires on June 30, 2027.



NOTES TO FINANCIAL STATEMENTS  
June 30, 2024

**NOTE 7 - LIQUIDITY AND AVAILABILITY OF FINANCIAL RESOURCES**

The total financial assets held by the School at June 30, 2024 and the amounts of those financial assets that could be made available for general expenditures within one year of the date of the statement of financial position are summarized in the following table:

Financial Assets at June 30, 2024	
Cash	\$ 1,256,226
Due from Federal, State and Local Governments	<u>742,920</u>
<b>FINANCIAL ASSETS AVAILABLE TO MEET GENERAL EXPENDITURES WITHIN ONE YEAR</b>	<u>\$ 1,999,146</u>

The School regularly monitors liquidity required to meet its operating needs and other contractual commitments while also striving to maximize the investment of its available funds. As part of the School's liquidity management, the School structures its financial assets to be available and liquid as its general expenditures, liabilities and other obligations become due. Additionally as noted in Note 5(c), under the service agreement between K12 and the School, K12 has committed to provide K12 invoice credits to be applied to K12 invoices up to the amount necessary to assure the School does not end a fiscal year with a deficit.





**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)

SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2024



**INSIGHT @ SAN JOAQUIN**

(A Non-Profit Organization)

PRELIMINARY DRAFT

December 2, 2024

SCHEDULE OF AVERAGE DAILY ATTENDANCE  
(NON-CLASSROOM BASED)  
Year Ended June 30, 2024

	Second Period Report	Annual Report
Grades 9 through 12	258.91	266.20
<b>TOTAL</b>	<b>258.91</b>	<b>266.20</b>

There was no ADA generated through classroom-based instruction as the charter school is non-classroom based.

See Independent Auditor's Report



**INSIGHT @ SAN JOAQUIN**

(A Non-Profit Organization)

PRELIMINARY DRAFT

December 2, 2024

**SCHEDULE OF INSTRUCTIONAL TIME**

**(NON-CLASSROOM BASED)**

**Year Ended June 30, 2024**

Not Applicable. The charter school is non-classroom based.

See Independent Auditor's Report



RECONCILIATION OF ANNUAL FINANCIAL AND BUDGET REPORT  
WITH AUDITED FINANCIAL STATEMENTS  
Year Ended June 30, 2024

June 30, 2024 Annual Financial and Budget Report Fund Balances (Net Assets)		\$	27,747
Adjustments and Reclassifications:			
Increasing (Decreasing) the Fund Balance (Net Assets)			
Due from Federal, State and Local Government	\$	270,527	
Deferred Outflows of Resources		(27,747)	
Accounts Payable and Accrued Expenses		975,351	
Deferred Revenue		44,056	
Due to K12 California LLC		<u>(1,262,187)</u>	
Net Adjustments and Reclassifications			<u>-</u>
June 30, 2024 Audited Financial Statement Fund Balances (Net Assets)		\$	<u>27,747</u>

See Independent Auditor's Report





**INSIGHT @ SAN JOAQUIN**  
(A Non-Profit Organization)

OTHER INFORMATION

YEAR ENDED JUNE 30, 2024



**CHARTER SCHOOL ORGANIZATION STRUCTURE**  
June 30, 2024

a. Date and Granting Authority  
of Charter School: July 1, 2015; New Jerusalem Elementary School District

b. Members of the Governing Board:

Name	Title	Board Term	Term Expiration
Jason Jones	District Representative	2 Years	12/07/2025
Fred Vallerga	Member - Secretary/Treasurer	2 Years	02/24/2025
Bill Bushman	Member	2 Years	06/04/2026
Deanna Vallerga	Member	2 Years	06/07/2025

c. Superintendent (District): Kellyann Reis  
Assistant Superintendent (District): Billy Wessell, Chief Business Official  
Administrator: Kimberly Odom, Head of School  
Chief Business Official: Francis Burke, Chief Business Official

d. Charter School Name: Insight @ San Joaquin  
Charter School Number: 1762



## **SECTION B**

Report on Internal Control over Financial  
Reporting and on Compliance and Other Matters  
Based on an Audit of Financial Statements Performed  
in Accordance with *Government Auditing Standards*



**REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN  
ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

**INDEPENDENT AUDITOR'S REPORT**

To the Board of Directors  
Insight @ San Joaquin

We have audited in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of Insight @ San Joaquin (A Non-Profit Organization) (the School), which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated December 9, 2024.

**Report on Internal Control over Financial Reporting**

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) as a basis for designing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

*A deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the School's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.





**Report on Compliance and Other Matters**

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

GREEN HASSON & JANKS LLP

December 9, 2024  
Los Angeles, California



## **SECTION C**

Independent Auditor's Report on State Compliance



## INDEPENDENT AUDITOR'S REPORT ON STATE COMPLIANCE

To the Board of Directors  
Insight @ San Joaquin

### **Report on Compliance**

#### **Opinion**

We have audited Insight @ San Joaquin's (the School) compliance with the requirements specified in the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* applicable to the School's state program requirements identified below for the year ended June 30, 2024.

In our opinion, the School complied, in all material respects, with the laws and regulations of the state programs noted in the table below for the year ended June 30, 2024.

#### **Basis for Opinion**

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the School and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion. Our audit does not provide a legal determination of the School's compliance with the compliance requirements referred to above.

#### **Responsibilities of Management for Compliance**

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to the School's state programs.

#### **Auditor's Responsibilities for the Audit Compliance**

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the School's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, will always detect a material misstatement when it exists. The risk of not detecting a material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the School's compliance with the requirements of the state programs as a whole.





In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the School’s compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the School’s internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, but not for the purpose of expressing an opinion on the effectiveness of the School’s internal control over compliance. Accordingly, we express no such opinion; and
- Select and test transactions and records to determine the School’s compliance with the state laws and regulations applicable to the following items:

2023-24 K12 Audit Guide Procedures	Procedures Performed*
<b>School Districts, County Offices of Education, and Charter Schools:</b>	
T. Proposition 28 Arts and Music in Schools	Yes
U. After/Before School Education and Safety Program	Not Applicable
V. Proper Expenditure of Education Protection Account Funds	Yes
W. Unduplicated Local Control Funding Formula Pupil Counts	Yes
X. Local Control and Accountability Plan	Yes
Y. Independent Study-Course Based	Not Applicable
Z. Immunizations	Not Applicable
AZ. Educator Effectiveness	Yes
BZ. Expanded Learning Opportunities Grant	Not Applicable
CZ. Career Technical Education Incentive Grant	Not Applicable
DZ. Expanded Learning Opportunities Program	Not Applicable
EZ. Transitional Kindergarten	Not Applicable
<b>Charter Schools:</b>	
AA. Attendance	Yes
BB. Mode of Instruction	Not Applicable
CC. Nonclassroom-Based Instruction/Independent Study	Yes
DD. Determination of Funding for Nonclassroom-Based Instruction	Yes
EE. Annual Instructional Minutes - Classroom Based	Not Applicable
FF. Charter School Facility Grant Program	Not Applicable

\*“Not Applicable” is used in the table above to indicate that the School either did not receive program funding or did not otherwise operate the program during the fiscal year.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identify during the audit.





### **Other Matters**

The results of our auditing procedures disclosed instances of noncompliance, which are described in the accompanying Schedule of Findings and Questioned Costs as item 2024-1.

Government Auditing Standards requires the auditor to perform limited procedures on the School's response to the noncompliance findings identified in our audit and described in the accompanying schedule of findings and questioned costs. The School's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

### **Report on Internal Control over Compliance**

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that a material noncompliance with a compliance requirement will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention from those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit, we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the *2023-24 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.

GREEN HASSON & JANKS LLP

December 9, 2024  
Los Angeles, California



SCHEDULES OF FINDINGS AND QUESTIONED COSTS  
June 30, 2024

**SECTION I - SCHEDULE OF AUDITOR'S FINDINGS**

Current year audit findings identified below have been coded as follows:

<u>Five Digit Code</u>	<u>Finding Type</u>
10000	Attendance
30000	Internal Control
40000	State Compliance

• **2024 - 1: Accurate Reporting of Student Attendance.**

**Finding Code: 10000, 30000, 40000**

**Criteria:** As part of the Average Daily Attendance (ADA) reporting, Annual report of attendance submitted to the California Department of Education (CDE) are supported by written contemporaneous records that document all pupil attendance included in the charter school's ADA calculation.

**Condition:** During the audit, we were made aware by management, that the Annual ADA was reported incorrectly to the CDE during the initial reporting window. The school originally reported an ADA of 266.64 but identified the corrected ADA to be 266.20 as part of their ongoing internal review process. Due to the CDE correction submission timelines, the correction cannot be submitted until the correction submission window opens in the CDE system. The ADA schedule in the audited financial statements correctly disclosed the ADA of 266.20.

**Effect:** We obtained and recalculated the ADA and noted that Annual report was over reported. We performed further audit procedures to verify the corrected ADA identified by management was accurate and concluded it was determined accurately.

**Cause:** The School reported a higher ADA in the original submission to the CDE and subsequently identified the correct ADA as part of their internal review process, and communicated the correct ADA to the School's auditors, but was unable to submit the corrections in the CDE system.

**Impact on ADA and Funding:** As a result, the Annual ADA was overstated by .44. To determine the dollar effect of the overstatement of the Annual ADA, a revised calculation was prepared to identify the total impact on funding which was determined to be a decrease of \$138. This finding did not impact the unduplicated LCFF pupil count or the amount of expenditures for a restricted program.

**Recommendation:** We recommend that management strengthen their internal review process to identify all changes to ADA prior to original submission to the CDE to the extent possible.



SCHEDULES OF FINDINGS AND QUESTIONED COSTS  
June 30, 2024

**SECTION I - SCHEDULE OF AUDITOR'S FINDINGS** (continued)

**Management's Response:** The correction window for the 2023-24 Annual ADA does not open until February 2025, which is subsequent to the issuance of the School's audit report. Once the correction window becomes available, management will submit the Annual ADA correction for FY 2023-24 to the CDE. Additionally, management will enhance their internal review process to identify any ADA changes prior to submission to the CDE, to the extent possible.

**SECTION II - SCHEDULE OF PRIOR AUDIT FINDINGS**

There are no prior year audit findings.





**TO: INSIGHT AT SAN JOAQUIN  
GOVERNING BOARD**

**APPROVED**

**BOARD REPORT #02**

**VIA: INSIGHT STAFF**

December 9, 2024

**SUBJECT:** Fiscal Year 2024-25 First Interim Budget Update

**PROPOSAL:**

It is proposed that the Governing Board of Insight at San Joaquin approve the “First Interim Budget Update.”

**BACKGROUND:**

This report has been prepared using the Fiscal Crisis and Management Assistance Team’s (FCMAT’s) Local Control Funding Formula (LCFF) calculator.

The adopted budget for the 2024-25 fiscal year was based on anticipated P2 ADA of 257 students. The current P2 ADA estimate for Insight at San Joaquin has increased to 355 students, which is expected to generate \$5,917,119 in funding. The current budget anticipates a deficit of \$81,302, which K12 Inc. has agreed, under the terms of the Educational, Products, and Services Agreement, to issue invoice credits, to be applied to K12 Invoices, so that Insight at San Joaquin’s revenues meet all expenses with no deficit. The current budget also includes a \$27,747 carry forward fund balance from a previous fiscal year, which Insight at San Joaquin will retain and carry forward into future fiscal years

**BUDGET IMPLICATIONS:**

The forecasted revenue is \$5,917,119. The school anticipates an ending fund balance of \$27,747 for the 2024-25 school year.

**RECOMMENDATIONS:**

It is recommended that the Governing Board:

1. Approve the First Interim Budget Update for the 2024-25 school year on behalf of Insight at San Joaquin.
2. Authorize the Head of School to make budget adjustments periodically to include unanticipated revenue or unexpected costs that may arise.





**RESPECTFULLY SUBMITTED**

Kimberly Odom  
Head of School

**PREPARED BY:**

Kimberly Odom  
Head of School

Francis "Paco" Burke  
Chief Business Official

**PRESENTED BY:**

Kimberly Odom  
Head of School

Francis "Paco" Burke  
Chief Business Official

Ayes: 2

No: 0

Abstain: 1

Approved: Yes Witnessed: *Casey Robinson* Date: 12/9/2024

Name	Aye	No	Abstain	Absent	Moved	Second
Fred Vallerga	X					X
Deanna Vallerga	X				X	
Jason Jones			X			



# **Insight at San Joaquin**

**Board Presentation**

**Fiscal Year 2024-25**

**First Interim Budget**







## Insight at San Joaquin

### Summary of Changes from Fiscal Year 2024-25 Adopted Budget

Category	Current	Incr (Decr)	Reason
ADA	355	98	38% increase compared to Fiscal Year 2024-25 Adopted Budget
LCFF Revenue	\$ 5,034,357	\$ 1,338,972	Increase primarily due to an increase in estimated P2 ADA
Restricted Revenue	\$ 871,286	\$ (75,219)	Primarily due to a decrease in planned Title and actual ESSER expenditures, removal of planned re-allocation of State SpEd Income from CAVA San Joaquin, partially offset by increase in planned one-time state restricted funding expenditures.
Expenses	\$ 5,917,119	\$ 1,265,241	Primarily due a decrease in estimated FY24-25 K12 Invoice Credits, an increase in enrollment driven certificated personnel and student instructional materials and services, and an increase in estimated SpEd contracted services expenditures

### Fiscal Year 2024-25 First Interim Budget Highlights

	SB740		46.04% Certificated salaries and benefits, as a percent of revenue, is 6.0% higher than required
			82.79% Instruction and instruction-related services, as a percent of revenue, is 2.8% higher than required
K12 Invoice Credits	\$	(81,302)	Amount of credits issued by K12 for Fiscal Year 2024-25, which guarantee the school does not end the year with a deficit





# Insight at San Joaquin

## Fiscal Year 2024-25

### First Interim Budget Comparison

Description	Object Code	2023-24 Adopted Budget	2023-24 First Interim Budget	vs. Adopted Budget Increase (Decrease)	% Change
<b>P2 ADA</b>		257	355	98	38.13% <sup>a</sup>
<b>A. REVENUES</b>					
1. LCFF/Revenue Limit Sources	8010-8099	\$ 3,695,385	\$ 5,034,357	\$ 1,338,972	36.23% <sup>b</sup>
2. Federal Revenues	8100-8299	336,094	259,981	(76,113)	-22.65% <sup>c</sup>
3. Other State Revenues	8300-8599	610,412	611,306	894	0.15% <sup>d</sup>
4. Other Local Revenues	8600-8799	9,987	11,475	1,488	14.90% <sup>e</sup>
5. TOTAL REVENUES		<b>\$ 4,651,878</b>	<b>\$ 5,917,119</b>	<b>\$ 1,265,241</b>	<b>27.20%</b>
<b>B. EXPENDITURES</b>					
1. Certificated Salaries	1000-1999	\$ 1,677,289	\$ 1,796,005	\$ 118,716	7.08% <sup>f</sup>
2. Non-certificated Salaries	2000-2999	256,925	199,936	(56,989)	-22.18% <sup>g</sup>
3. Employee Benefits	3000-3999	610,470	688,401	77,931	12.77% <sup>h</sup>
4. Books and Supplies	4000-4999	827,726	982,667	154,940	18.72% <sup>i</sup>
5. Services and Other Operating Expenditures	5000-5999	1,265,951	2,237,819	971,868	76.77% <sup>j</sup>
6. Capital Outlay	6000-6999	13,516	12,290	(1,225)	-9.07% <sup>k</sup>
7. Other Outgo	7100-7499	-	-	-	
8. TOTAL EXPENDITURES		<b>\$ 4,651,878</b>	<b>\$ 5,917,119</b>	<b>\$ 1,265,241</b>	<b>27.20%</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUE OVER EXPEND. BEFORE OTHER FINANCING SOURCES</b>		-	-	-	
<b>D. OTHER FINANCING SOURCES/USES</b>		-	-	-	
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE</b>		-	-	-	

#### EXPLANATION OF VARIANCES:

- a 38% increase compared to Fiscal Year 2024-25 Adopted Budget
- b Increase primarily due to an increase in estimated P2 ADA
- c Primarily due to a decrease in planned Title and actual ESSER expenditures
- d Primarily due to increase in planned one-time state restricted funding expenditures, nearly offset by removal of planned re-allocation of State SpEd Income from CAVA San Joaquin
- e Estimated increase in interest income
- f Primarily due to increase of enrollment driven certificated personnel
- g Primarily due to decrease in restricted funded classified personnel and correction of incorrectly categorized certificated position
- h Primarily due to an estimated increase in employer portion of health benefits
- i Primarily due to an enrollment-driven increase in student materials and services
- j Primarily due to a decrease in estimated FY24-25 K12 Invoice Credits
- k Due to estimated decrease in asset purchases - employee computers and technology







# Insight at San Joaquin

## Fiscal Year 2024-25 First Interim Budget

Senate Bill 740 Instructional Cost		
Certificated Salaries and Benefits	Object Code	Total
Certificated Teacher Salaries	1100	\$ 1,581,465
Cert. Supervisors' and Admin. Salaries	1300	\$ 214,541
Additional Certificated Personnel Pay	1900	\$ 0
Certificated Employee Benefits	3000-3999	\$ 600,292
Special Ed. - Certificated Contract Services (Certificated Portion - 80%)	5100	\$ 327,757
<b>Certificated Staff Cost</b>		<b>\$ 2,724,055</b>
Non-Certificated Support Salaries	2200	\$ 199,936
Non-Certificated Employee Benefits	3000-3999	\$ 88,109
Approved Textbooks and Core Curricula Materials	4100	\$ 934,246
Materials and Supplies	4300	\$ 48,420
Special Ed. - Certificated Contract Services (Non-certificated portion - 20%)	5100	\$ 36,417
Travel and Conferences	5200	\$ 104,468
Inst. Computers/Printers/Leasing	5600	\$ 286,405
Contract - Student Instructional Technology (7%)	5800	\$ 428,171
Other Instructional and Operating Expenditures	5800	\$ 2,079
ISP Services/Telephone	5900	\$ 46,463
<b>Instruction &amp; Instruction-Related Costs</b>		<b>\$ 2,174,715</b>
<b>Total Instructional Cost</b>		<b>\$ 4,898,769</b>

SB 740 Requirement	Expenditures	Federal & State Revenues	% Spent (Expenditures / Revenues)
A. Certificated Teachers' Salaries and Benefits	\$ 2,724,055	\$ 5,917,119	46.04%
B. Total Instructional Costs	\$ 4,898,769	\$ 5,917,119	82.79%
C. PTR (Pupil-Teacher Ratio)	<b>21.55 : 1</b>		

**Note:**

In order to qualify for a 100% funding recommendation from ACCS, Insight at San Joaquin needs to meet the following criteria:

- 1) Line A. must equal or exceed 40 percent,
- 2) Line B. must equal or exceed 80 percent, AND
- 3) Line C. PTR (Pupil-Teacher Ratio) cannot exceed of 25:1

### K12 Invoice Credit Methodology

In the school's agreement with K12, Inc., K12, Inc. issues invoice credits, to be applied to K12 invoices, within the school year so that the school's revenues meets all operating expenses with no deficit. As a result, the audited financials for fiscal year 2024-25 will show a balanced budget.

K12 Charges	Original Invoice	Invoice Credits	Revised Invoice
Support Services Fees (13%)	\$ 795,174	\$ (81,302)	\$ 713,872
Technology Fees (7%)	\$ 428,171	\$ -	\$ 428,171
OLS - Curriculum & Development	\$ 745,692	\$ -	\$ 745,692
Instruction Materials	\$ 150,369	\$ -	\$ 150,369
Inst. Computers/Printers/Leasing	\$ 274,787	\$ -	\$ 274,787
<b>Total Net K12, Inc.-Related Expenditures</b>	<b>\$ 2,394,194</b>	<b>\$ (81,302)</b>	<b>\$ 2,312,891</b>



**CHARTER SCHOOL  
BUDGET FINANCIAL REPORT - ALTERNATIVE FORM  
2024-25 FIRST INTERIM**

Charter School Name: Insight @ San Joaquin  
(continued) \_\_\_\_\_

CDS #: 39686270133116

Charter Approving Entity: New Jerusalem Elementary School District

County: San Joaquin

Charter #: 1762

Fiscal Year: 2024-25

To the entity that approved the charter school:

(      ) 2024-25 CHARTER SCHOOL FIRST INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 47604.33.

Signed: \_\_\_\_\_ Date: December 9, 2024  
Charter School Official  
(Original signature required)

Print Name: Kimberly Odom Title: Head of School

To the County Superintendent of Schools:

(      ) 2024-25 CHARTER SCHOOL FIRST INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 47604.33.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Authorized Representative of  
Charter Approving Entity  
(Original signature required)

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

For additional information on the First Interim Report, please contact:

For Approving Entity:

Billy Wessell  
Name

Chief Business Officer  
Title

209-740-4699x1103  
Phone

bwessell@njes.org  
E-mail

For Charter School:

Francis "Paco" Burke  
Name

Chief Business Official  
Title

805.232.4142  
Phone

fburke@caliva.org  
E-mail

This report has been verified for mathematical accuracy by the County Superintendent of Schools, pursuant to *Education Code* Section 47604.33.

\_\_\_\_\_  
County Representative

\_\_\_\_\_  
Date



**CHARTER SCHOOL  
BUDGET FINANCIAL REPORT - ALTERNATIVE FORM  
2024-25 FIRST INTERIM - SUMMARY**

Charter School Name: Insight @ San Joaquin  
 (continued) \_\_\_\_\_  
 CDS #: 39686270133116  
 Charter Approving Entity: New Jerusalem Elementary School District  
 County: San Joaquin  
 Charter #: 1762  
 Fiscal Year: 2024-25

Description	Object Code	2024-25 Adopted Budget (X)	2024-25 First Interim (Z)	Adopted Budget vs. First Interim Increase (Decrease)	
				\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
<b>A. REVENUES</b>					
1. LCFF/Revenue Limit Sources	8010-8099	3,695,385	5,034,357	1,338,972	36.23%
2. Federal Revenues	8100-8299	336,094	259,981	-76,113	-22.65%
3. Other State Revenues	8300-8599	610,412	611,306	894	0.15%
4. Other Local Revenues	8600-8799	9,987	11,475	1,488	14.90%
5. TOTAL REVENUES		4,651,878	5,917,119	1,265,241	27.20%
<b>B. EXPENDITURES</b>					
1. Certificated Salaries	1000-1999	1,677,289	1,796,005	118,716	7.08%
2. Non-certificated Salaries	2000-2999	256,925	199,936	-56,989	-22.18%
3. Employee Benefits	3000-3999	610,470	688,401	77,931	12.77%
4. Books and Supplies	4000-4999	827,226	982,667	154,940	18.72%
5. Services and Other Operating Expenditures	5000-5999	1,265,951	2,237,819	971,868	76.77%
6. Capital Outlay (Objects 6100-6170, 6200-6500 modified accrual basis only)	6000-6999	13,516	12,290	-1,225	-9.07%
7. Other Outgo	7100-7499	0	0	0	
8. TOTAL EXPENDITURES		4,651,878	5,917,119	1,265,241	27.20%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>					
		0	0	0	
<b>D. OTHER FINANCING SOURCES / USES</b>					
1. Other Sources	8930-8979	0	0	0	
2. Less: Other Uses	7630-7699	0	0	0	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	0	0	0	
4. TOTAL OTHER FINANCING SOURCES / USES		0	0	0	
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>					
		0	0	0	
<b>F. FUND BALANCE, RESERVES</b>					
1. Beginning Fund Balance					
a. As of July 1	9791	27,747	27,747	0	0.00%
b. Adjustments to Beginning Balance	9793, 9795	0	0	0	
c. Adjusted Beginning Balance		27,747	27,747		
2. Ending Fund Balance, June 30 (E + F.1.c.)		27,747	27,747		
<b>Components of Ending Fund Balance :</b>					
a. Nonspendable					
Revolving Cash (equals object 9130)	9711	-	-	-	
Stores (equals object 9320)	9712	-	-	-	
Prepaid Expenditures (equals object 9330)	9713	-	-	-	
All Others	9719	-	-	-	
b. Restricted	9740	-	-	-	
c. Committed					
Stabilization Arrangements	9750	-	-	-	
Other Commitments	9760	-	-	-	
d. Assigned					
Other Assignments	9780	-	-	-	
e. Unassigned/Unappropriated					
Reserve for Economic Uncertainties	9789	-	-	-	
Unassigned/Unappropriated Amount	9790	27,747	27,747	-	0%





**CHARTER SCHOOL  
BUDGET FINANCIAL REPORT - ALTERNATIVE FORM  
2024-25 First Interim Report - Detail**

Charter School Name: Insight @ San Joaquin  
(continued)  
CDS #: 39686270133116  
Charter Approving Entity: New Jerusalem Elementary School District  
County: San Joaquin  
Charter #: 1762  
Fiscal Year: 2024-25

This charter school uses the following basis of accounting:

- Accrual Basis** (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
 **Modified Accrual Basis** (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	2024-25 Adopted Budget			2024-25 Actuals thru 10/31			2024-25 First Interim Budget		
		Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
<b>A. REVENUES</b>										
<b>1. LCFE/Revenue Limit Sources</b>										
State Aid - Current Year	8011	3,600,626	-	3,600,626	1,391,113	-	1,391,113	4,900,450	-	4,900,450
Education Protection Account State Aid - Current Year	8012	51,846	-	51,846	19,529	-	19,529	70,940	-	70,940
Charter Schools Gen. Purpose Entitlement - State Aid	8015	-	-	-	-	-	-	-	-	-
State Aid - Prior Years	8019	-	-	-	-	-	-	-	-	-
Tax Relief Subventions	8020-8039	-	-	-	-	-	-	-	-	-
County and District Taxes	8040-8079	-	-	-	-	-	-	-	-	-
Miscellaneous Funds	8080-8089	-	-	-	-	-	-	-	-	-
<b>LCFE/Revenue Limit Transfers:</b>										
PERS Reduction Transfer	8092	-	-	-	-	-	-	-	-	-
Charter Schools Funding in lieu of Property Taxes	8096	42,913	-	42,913	14,115	-	14,115	62,966	-	62,966
Other LCFE/Revenue Limit Transfers	8091, 8097	-	-	-	-	-	-	-	-	-
<b>Total, LCFE/Revenue Limit Sources</b>		<b>3,695,385</b>	<b>-</b>	<b>3,695,385</b>	<b>1,424,757</b>	<b>-</b>	<b>1,424,757</b>	<b>5,034,357</b>	<b>-</b>	<b>5,034,357</b>
<b>2. Federal Revenues</b>										
No Child Left Behind	8290	-	95,943	95,943	-	28,236	28,236	-	49,285	49,285
Special Education - Federal	8181, 8182	-	37,541	37,541	-	-	-	-	27,918	27,918
Child Nutrition - Federal	8220	-	-	-	-	-	-	-	-	-
Other Federal Revenues	8110, 8260-8299	-	202,609	202,609	-	44,508	44,508	-	182,777	182,777
<b>Total, Federal Revenues</b>		<b>-</b>	<b>336,094</b>	<b>336,094</b>	<b>-</b>	<b>72,744</b>	<b>72,744</b>	<b>-</b>	<b>259,981</b>	<b>259,981</b>
<b>3. Other State Revenues</b>										
Special Education - State	StateRevSE	-	398,335	398,335	-	176,057	176,057	-	346,402	346,402
All Other State Revenues	StateRevAO	52,683	159,394	212,077	23,721	12,769	36,490	75,105	189,798	264,903
<b>Total, Other State Revenues</b>		<b>52,683</b>	<b>557,728</b>	<b>610,412</b>	<b>23,721</b>	<b>188,826</b>	<b>212,546</b>	<b>75,105</b>	<b>536,200</b>	<b>611,306</b>
<b>4. Other Local Revenues</b>										
All Other Local Revenues	LocalRevAO	9,987	-	9,987	3,642	-	3,642	11,475	-	11,475
<b>Total, Local Revenues</b>		<b>9,987</b>	<b>-</b>	<b>9,987</b>	<b>3,642</b>	<b>-</b>	<b>3,642</b>	<b>11,475</b>	<b>-</b>	<b>11,475</b>
<b>5. TOTAL REVENUES</b>		<b>3,758,055</b>	<b>893,822</b>	<b>4,651,878</b>	<b>1,452,120</b>	<b>261,570</b>	<b>1,713,690</b>	<b>5,120,938</b>	<b>796,181</b>	<b>5,917,119</b>
<b>B. EXPENDITURES</b>										
<b>1. Certificated Salaries</b>										
Certificated Teachers' Salaries	1100	1,084,256	312,038	1,396,293	158,550	69,991	228,541	1,231,715	349,749	1,581,465
Certificated Pupil Support Salaries	1200	-	-	-	-	-	-	-	-	-
Certificated Supervisors' and Administrators' Salaries	1300	96,781	96,781	193,563	83,433	41,716	125,149	143,027	71,514	214,541
Other Certificated Salaries	1900	70,634	16,800	87,433	-	-	-	0	0	0
<b>Total, Certificated Salaries</b>		<b>1,251,670</b>	<b>425,619</b>	<b>1,677,289</b>	<b>241,983</b>	<b>111,707</b>	<b>353,690</b>	<b>1,374,742</b>	<b>421,263</b>	<b>1,796,005</b>
<b>2. Non-certificated Salaries</b>										
Non-certificated Instructional Aides' Salaries	2100	-	-	-	-	-	-	-	-	-
Non-certificated Support Salaries	2200	97,648	159,277	256,925	31,507	9,393	40,900	154,017	45,919	199,936
Non-certificated Supervisors' and Administrators' Sal.	2300	-	-	-	-	-	-	-	-	-
Clerical and Office Salaries	2400	-	-	-	-	-	-	-	-	-
Other Non-certificated Salaries	2900	-	-	-	-	-	-	-	-	-
<b>Total, Non-certificated Salaries</b>		<b>97,648</b>	<b>159,277</b>	<b>256,925</b>	<b>31,507</b>	<b>9,393</b>	<b>40,900</b>	<b>154,017</b>	<b>45,919</b>	<b>199,936</b>
<b>3. Employee Benefits</b>										
STRS	3101-3102	239,069	81,293	320,362	44,575	22,980	67,555	262,576	80,461	343,037
PERS	3201-3202	26,414	43,085	69,498	8,523	2,541	11,064	41,662	12,421	54,083
OASDI / Medicare / Alternative	3301-3302	26,863	13,487	40,350	4,497	2,202	6,700	21,168	10,365	31,533
Health and Welfare Benefits	3401-3402	143,308	8,514	151,822	42,157	12,197	54,355	181,071	47,664	228,735
Unemployment Insurance	3501-3502	4,123	1,766	5,889	962	496	1,458	4,527	2,336	6,863
Workers' Compensation Insurance	3601-3602	15,785	6,763	22,548	3,385	1,747	5,131	15,930	8,221	24,151
OPEB, Allocated	3701-3702	-	-	-	-	-	-	-	-	-
OPEB, Active Employees	3751-3752	-	-	-	-	-	-	-	-	-
PERS Reduction (for revenue limit funded schools)	3801-3802	-	-	-	-	-	-	-	-	-
Other Employee Benefits	3901-3902	-	-	-	-	-	-	-	-	-
<b>Total, Employee Benefits</b>		<b>455,561</b>	<b>154,909</b>	<b>610,470</b>	<b>104,099</b>	<b>42,163</b>	<b>146,262</b>	<b>526,933</b>	<b>161,468</b>	<b>688,401</b>
<b>4. Books and Supplies</b>										
Approved Textbooks and Core Curricula Materials	4100	772,038	14,376	786,415	168,909	6,581	175,489	899,212	35,034	934,246
Books and Other Reference Materials	4200	-	-	-	-	-	-	-	-	-
Materials and Supplies	4300	41,312	-	41,312	-	-	-	48,420	-	48,420
Noncapitalized Equipment	4400	-	-	-	-	-	-	-	-	-
Food	4700	-	-	-	-	-	-	-	-	-
<b>Total, Books and Supplies</b>		<b>813,350</b>	<b>14,376</b>	<b>827,726</b>	<b>168,909</b>	<b>6,581</b>	<b>175,489</b>	<b>947,633</b>	<b>35,034</b>	<b>982,667</b>





**CHARTER SCHOOL  
BUDGET FINANCIAL REPORT - ALTERNATIVE FORM  
2024-25 First Interim Report - Detail**

Charter School Name: Insight @ San Joaquin  
(continued)  
CDS #: 39686270133116  
Charter Approving Entity: New Jerusalem Elementary School District  
County: San Joaquin  
Charter #: 1762  
Fiscal Year: 2024-25

This charter school uses the following basis of accounting:

- Accrual Basis** (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
 **Modified Accrual Basis** (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	2024-25 Adopted Budget			2024-25 Actuals thru 10/31			2024-25 First Interim Budget		
		Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
<b>5. Services and Other Operating Expenditures</b>										
Subagreements for Services	5100	-	322,406	322,406	-	63,088	63,088	-	364,175	364,175
Travel and Conferences	5200	69,926	241,877	311,803	672	21,665	22,337	3,144	101,323	104,468
Dues and Memberships	5300	7,913	2,244	10,157	3,014	3,197	6,211	6,608	7,010	13,618
Insurance	5400	16,451	-	16,451	6,245	-	6,245	18,892	-	18,892
Operations and Housekeeping Services	5500	2,629	-	2,629	260	-	260	2,318	-	2,318
Rentals, Leases, Repairs, and Noncap. Improvements	5600	235,634	-	235,634	72,776	-	72,776	286,405	-	286,405
Transfers of Direct Costs	5700	-	-	-	-	-	-	-	-	-
Professional/Consulting Services and Operating Expend.	5800	319,623	274	319,897	418,545	3,563	422,109	1,389,649	11,831	1,401,481
Communications	5900	45,422	1,552	46,974	16,171	212	16,383	45,863	600	46,463
<b>Total, Services and Other Operating Expenditures</b>		<b>697,599</b>	<b>568,353</b>	<b>1,265,951</b>	<b>517,683</b>	<b>91,725</b>	<b>609,408</b>	<b>1,752,879</b>	<b>484,940</b>	<b>2,237,819</b>
<b>6. Capital Outlay (Objects 6100-6170, 6200-6500 for modified accrual basis only)</b>										
Land and Land Improvements	6100-6170	-	-	-	-	-	-	-	-	-
Buildings and Improvements of Buildings	6200	-	-	-	-	-	-	-	-	-
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	-	-	-	-	-	-	-	-	-
Equipment	6400	-	-	-	-	-	-	-	-	-
Equipment Replacement	6500	-	-	-	-	-	-	-	-	-
Depreciation Expense (for accrual basis only)	6900	13,516	-	13,516	2,405	-	2,405	12,290	-	12,290
<b>Total, Capital Outlay</b>		<b>13,516</b>	<b>-</b>	<b>13,516</b>	<b>2,405</b>	<b>-</b>	<b>2,405</b>	<b>12,290</b>	<b>-</b>	<b>12,290</b>
<b>7. Other Outgo</b>										
Tuition to Other Schools	7110-7143	-	-	-	-	-	-	-	-	-
Transfers of Pass-through Revenues to Other LEAs	7211-7213	-	-	-	-	-	-	-	-	-
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	-	-	-	-	-
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	-	-	-	-	-
All Other Transfers	7281-7299	-	-	-	-	-	-	-	-	-
Debt Service:										
Interest	7438	-	-	-	-	-	-	-	-	-
Principal (for modified accrual basis only)	7439	-	-	-	-	-	-	-	-	-
<b>Total, Other Outgo</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>8. TOTAL EXPENDITURES</b>		<b>3,329,344</b>	<b>1,322,534</b>	<b>4,651,878</b>	<b>1,066,585</b>	<b>261,570</b>	<b>1,328,155</b>	<b>4,768,495</b>	<b>1,148,624</b>	<b>5,917,119</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>										
		<b>428,712</b>	<b>(428,712)</b>	<b>(0)</b>	<b>385,535</b>	<b>-</b>	<b>385,535</b>	<b>352,443</b>	<b>(352,443)</b>	<b>(0)</b>
<b>D. OTHER FINANCING SOURCES / USES</b>										
1. Other Sources	8930-8979	-	-	-	-	-	-	-	-	-
2. Less: Other Uses	7630-7699	-	-	-	-	-	-	-	-	-
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	<b>(428,712)</b>	<b>428,712</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(352,443)</b>	<b>352,443</b>	<b>-</b>
4. TOTAL OTHER FINANCING SOURCES / USES		<b>(428,712)</b>	<b>428,712</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(352,443)</b>	<b>352,443</b>	<b>-</b>
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>										
		<b>-</b>	<b>-</b>	<b>(0)</b>	<b>385,535</b>	<b>-</b>	<b>385,535</b>	<b>(0)</b>	<b>-</b>	<b>(0)</b>
<b>F. FUND BALANCE, RESERVES</b>										
1. Beginning Fund Balance										
a. As of July 1	9791	27,747	-	27,747	27,747	-	27,747	27,747	-	27,747
b. Adjustments to Beginning Balance	9793, 9795	-	-	-	-	-	-	-	-	-
c. Adjusted Beginning Balance		27,747	-	27,747	27,747	-	27,747	27,747	-	27,747
2. Ending Fund Balance, June 30 (E + F.1.c.)		27,747	-	27,747	413,282	-	413,282	27,747	-	27,747
Components of Ending Fund Balance :										
a. Nonspendable										
Revolving Cash (equals object 9130)	9711	-	-	-	-	-	-	-	-	-
Stores (equals object 9320)	9712	-	-	-	-	-	-	-	-	-
Prepaid Expenditures (equals object 9330)	9713	-	-	-	-	-	-	-	-	-
All Others	9719	-	-	-	-	-	-	-	-	-
b. Restricted	9740	-	-	-	-	-	-	-	-	-
c. Committed										
Stabilization Arrangements	9750	-	-	-	-	-	-	-	-	-
Other Commitments	9760	-	-	-	-	-	-	-	-	-
d. Assigned										
Other Assignments	9780	-	-	-	-	-	-	-	-	-
e. Unassigned/Unappropriated										
Reserve for Economic Uncertainties	9789	-	-	-	-	-	-	-	-	-
Unassigned/Unappropriated Amount	9790	27,747	-	27,747	413,282	-	413,282	27,747	-	27,747





# Insight at San Joaquin

## Fiscal Year 2024-25 First Interim Budget

Multi-Year Projection Assumptions			
Factor	FY 2024-25 (Y1)	FY 2025-26 (Y2)	FY 2026-27 (Y3)
Estimated Enrollment	400	394	398
Estimated # Unduplicated Pupils	275	268	273
Estimated P2 ADA	355	358	362
Average Daily Attendance Growth Rate <sup>1</sup>	36.8%	1.0%	1.0%
Special Education	36.8%	1.0%	1.0%
California Consumer Price Index (CA CPI)	3.23%	2.86%	2.81%
Statutory Cost-of-Living Allowance (COLA)	1.07%	2.93%	3.08%
Base Grant Proration Factor	0.00%	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	0.00%	0.00%	0.00%
Effective Incr (Decr) Local Control Funding Formula (LCFF) Funding Rate per ADA <sup>2</sup>	-1.52%	2.97%	2.83%
Estimated Certificated FTEs	25.3	25.5	25.8
% Increase (Decrease) Certificated FTEs	30.41%	1.00%	1.00%
% Increase (Decrease) Certificated Salaries per FTE	-17.89%	3.06%	2.38%
Salaries (Min Wage Schedule)	3.13%	3.03%	2.35%
CalSTRS Employer Rate (statutory)	19.10%	19.10%	19.10%
Estimated Classified FTEs	4.8	4.8	4.8
% Increase (Decrease) Classified FTEs	-12.54%	0.00%	0.00%
% Increase (Decrease) Classified Salaries per FTE	-11.02%	2.86%	2.81%
CalPERS Employer Rate (statutory)	27.05%	27.60%	28.00%
Other State Revenues: Lottery	\$ 79,879	\$ 82,163	\$ 84,472
Other State Revenues: Mandated Block Grant	\$ 19,477	\$ 20,047	\$ 20,665
Other State Revenues: Educator Effectiveness	\$ 165,547	\$ 170,398	\$ 175,646
Other Federal Revenues: ESSA CSI	\$ 126,214	\$ 129,824	\$ 133,472
Other Federal Revenues: ESSER I, II, III	\$ 56,563	\$ -	\$ -

<sup>1</sup> FY 2024-25 growth rate based on FY 2023-24 P2 ADA

<sup>2</sup> Based on FCMAT Local Control Funding Formula calculator (includes COLA & Grade Span Adjustments).





**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM  
2024-25 First Interim**

Charter School Name: Insight @ San Joaquin

(continued) \_\_\_\_\_

CDS #: 39686270133116

Charter Approving Entity: New Jerusalem Elementary School Distric

County: San Joaquin

Charter #: 1762

Fiscal Year: 2024-25

This charter school uses the following basis of accounting:

Accrual Basis (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)

Modified Accrual Basis (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	FY 2024-25			2025-26 Projections	2026-27 Projections
		Unrestricted	Restricted	Total		
<b>A. REVENUES</b>						
1. LCFF/Revenue Limit Sources						
State Aid - Current Year	8011	4,900,450	0	4,900,450	5,101,371	5,302,577
Education Protection Account State Aid - Current Year	8012	70,940	0	70,940	71,650	72,366
Charter Schools Gen. Purpose Entitlement - State Aid	8015	0	0	0	0	0
State Aid - Prior Years	8019	0	0	0	0	0
Tax Relief Subventions	8020-8039	0	0	0	0	0
County and District Taxes	8040-8079	0	0	0	0	0
Miscellaneous Funds	8080-8089	0	0	0	0	0
LCFF/Revenue Limit Transfers:						
PERS Reduction Transfer	8092	0	0	0	0	0
Charter Schools Funding in lieu of Property Taxes	8096	62,966	0	62,966	62,558	62,558
Other LCFF/Revenue Limit Transfers	8091, 8097	0	0	0	0	0
Total, LCFF/Revenue Limit Sources		5,034,357	0	5,034,357	5,235,578	5,437,501
2. Federal Revenues						
No Child Left Behind	8290	0	49,285	49,285	50,695	52,120
Special Education - Federal	8181, 8182	0	27,918	27,918	28,197	28,479
Child Nutrition - Federal	8220	0	0	0	0	0
Other Federal Revenues	8110, 8260-8299	0	182,777	182,777	129,824	0
Total, Federal Revenues		0	259,981	259,981	208,716	80,599
3. Other State Revenues						
Special Education - State	StateRevSE	0	346,402	346,402	349,866	353,365
All Other State Revenues	StateRevAO	75,105	189,798	264,903	272,609	280,783
Total, Other State Revenues		75,105	536,200	611,306	622,475	634,148
4. Other Local Revenues						
All Other Local Revenues	LocalRevAO	11,475	0	11,475	0	0
Total, Local Revenues		11,475	0	11,475	0	0
5. TOTAL REVENUES						
		5,120,938	796,181	5,917,119	6,066,770	6,152,248
<b>B. EXPENDITURES</b>						
1. Certificated Salaries						
Certificated Teachers' Salaries	1100	1,231,715	349,749	1,581,465	1,648,257	1,705,160
Certificated Pupil Support Salaries	1200	0	0	0	0	0
Certificated Supervisors' and Administrators' Salaries	1300	143,027	71,514	214,541	220,677	226,878
Other Certificated Salaries	1900	0	0	0	0	0
Total, Certificated Salaries		1,374,742	421,263	1,796,005	1,868,934	1,932,038
2. Non-certificated Salaries						
Non-certificated Instructional Aides' Salaries	2100	0	0	0	0	0
Non-certificated Support Salaries	2200	154,017	45,919	199,936	205,654	211,433
Non-certificated Supervisors' and Administrators' Sal.	2300	0	0	0	0	0
Clerical and Office Salaries	2400	0	0	0	0	0
Other Non-certificated Salaries	2900	0	0	0	0	0
Total, Non-certificated Salaries		154,017	45,919	199,936	205,654	211,433
3. Employee Benefits						
STRS	3101-3102	262,576	80,461	343,037	356,966	369,019
PERS	3201-3202	41,662	12,421	54,083	56,760	59,201
OASDI / Medicare / Alternative	3301-3302	21,168	10,365	31,533	31,931	32,718
Health and Welfare Benefits	3401-3402	181,071	47,664	228,735	220,031	221,152
Unemployment Insurance	3501-3502	4,527	2,336	6,863	6,950	7,121
Workers' Compensation Insurance	3601-3602	15,930	8,221	24,151	24,456	25,058
OPEB, Allocated	3701-3702	0	0	0	0	0
OPEB, Active Employees	3751-3752	0	0	0	0	0
PERS Reduction (for revenue limit funded schools)	3801-3802	0	0	0	0	0
Other Employee Benefits	3901-3902	0	0	0	0	0
Total, Employee Benefits		526,933	161,468	688,401	697,095	714,269



**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM  
2024-25 First Interim**

Charter School Name: Insight @ San Joaquin  
(continued) \_\_\_\_\_  
CDS #: 39686270133116  
Charter Approving Entity: New Jerusalem Elementary School Distric  
County: San Joaquin  
Charter #: 1762  
Fiscal Year: 2024-25

This charter school uses the following basis of accounting:

- Accrual Basis (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
 Modified Accrual Basis (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	FY 2024-25			2025-26 Projections	2026-27 Projections
		Unrestricted	Restricted	Total		
<b>4. Books and Supplies</b>						
Approved Textbooks and Core Curricula Materials	4100	899,212	35,034	934,246	961,602	991,151
Books and Other Reference Materials	4200	0	0	0	0	0
Materials and Supplies	4300	48,420	0	48,420	49,805	51,205
Noncapitalized Equipment	4400	0	0	0	0	0
Food	4700	0	0	0	0	0
Total, Books and Supplies		947,633	35,034	982,667	1,011,408	1,042,355
<b>5. Services and Other Operating Expenditures</b>						
Subagreements for Services	5100	0	364,175	364,175	374,590	385,116
Travel and Conferences	5200	3,144	101,323	104,468	107,455	110,475
Dues and Memberships	5300	6,608	7,010	13,618	4,861	4,997
Insurance	5400	18,892	0	18,892	19,432	19,978
Operations and Housekeeping Services	5500	2,318	0	2,318	2,385	2,452
Rentals, Leases, Repairs, and Noncap. Improvements	5600	286,405	0	286,405	294,788	303,836
Transfers of Direct Costs	5700	0	0	0	0	0
Professional/Consulting Services and Operating Expend.	5800	1,389,649	11,831	1,401,481	1,419,735	1,363,167
Communications	5900	45,863	600	46,463	47,792	49,135
Total, Services and Other Operating Expenditures		1,752,879	484,940	2,237,819	2,271,037.63	2,239,155.53
<b>6. Capital Outlay (Obj. 6100-6170, 6200-6500 for mod. accr. basis only)</b>						
Land and Land Improvements	6100-6170	0	0	0	0	0
Buildings and Improvements of Buildings	6200	0	0	0	0	0
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0	0	0	0	0
Equipment	6400	0	0	0	0	0
Equipment Replacement	6500	0	0	0	0	0
Depreciation Expense (for accrual basis only)	6900	12,290	0	12,290	12,642	12,997
Total, Capital Outlay		12,290	0	12,290	12,642	12,997
<b>7. Other Outgo</b>						
Tuition to Other Schools	7110-7143	0	0	0	0	0
Transfers of Pass-through Revenues to Other LEAs	7211-7213	0	0	0	0	0
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0	0	0	0	0
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0	0	0	0	0
All Other Transfers	7280-7299	0	0	0	0	0
Debt Service:						
Interest	7438	0	0	0	0	0
Principal (for modified accrual basis only)	7439	0	0	0	0	0
Total, Other Outgo		0	0	0	0	0
<b>8. TOTAL EXPENDITURES</b>		4,768,495	1,148,624	5,917,119	6,066,770	6,152,248
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		352,443	(352,443)	(0)	(0)	(0)
<b>D. OTHER FINANCING SOURCES / USES</b>						
1. Other Sources	8930-8979	0	0	0		
2. Less: Other Uses	7630-7699	0	0	0		
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(352,443)	352,443	0		
4. TOTAL OTHER FINANCING SOURCES / USES		(352,443)	352,443	0	0	0
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		(0)	0	(0)	(0)	(0)





**CHARTER SCHOOL  
MULTI-YEAR PROJECTION - ALTERNATIVE FORM  
2024-25 First Interim**

Charter School Name: Insight @ San Joaquin

(continued) \_\_\_\_\_

CDS #: 39686270133116

Charter Approving Entity: New Jerusalem Elementary School Distric

County: San Joaquin

Charter #: 1762

Fiscal Year: 2024-25

This charter school uses the following basis of accounting:

- Accrual Basis (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)
- Modified Accrual Basis (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	FY 2024-25			2025-26 Projections	2026-27 Projections
		Unrestricted	Restricted	Total		
<b>F. FUND BALANCE, RESERVES</b>						
1. Beginning Fund Balance						
a. As of July 1	9791	27,747	0	27,747	27,747	27,747
b. Adjustments to Beginning Balance	9793, 9795	0	0	0		
c. Adjusted Beginning Balance		27,747	0	27,747	27,747	27,747
2. Ending Fund Balance, June 30 (E + F.1.c.)		27,747	0	27,747	27,747	27,747
Components of Ending Fund Balance:						
a. Nonspendable						
Revolving Cash (equals object 9130)	9711	0	0	0	0	0
Stores (equals object 9320)	9712	0	0	0	0	0
Prepaid Expenditures (equals object 9330)	9713	0	0	0	0	0
All Others	9719	0	0	0	0	0
b. Restricted	9740	0	0	0	0	0
c. Committed						
Stabilization Arrangements	9750	0	0	0	0	0
Other Commitments	9760	0	0	0	0	0
d. Assigned						
Other Assignments	9780	0	0	0	0	0
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	0	0	0	0	0
Unassigned/Unappropriated Amount	9790	27,747	0	27,747	27,747	27,747







Insight @ San Joaquin (133116) - FY24-25 1st Interim						
	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
<b>General Assumptions</b>						
COLA & Augmentation	5.07%	13.26%	8.22%	1.07%	2.93%	3.08%
Base Grant Proration Factor	-	0.00%	0.00%	0.00%	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	-	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Student Assumptions:</b>						
Enrollment Count	202	188	261	400	394	398
Unduplicated Pupil Count (UPC)	129	122	194	275	268	273
Unduplicated Pupil Percentage (UPP)	61.75%	64.46%	68.36%	69.55%	69.76%	68.37%
Current Year LCFF Average Daily Attendance (ADA)	180.22	185.12	259.21	354.70	358.25	361.83
Funded LCFF ADA	180.22	185.12	259.21	354.70	358.25	361.83
LCFF ADA Funding Method	Current Year	Current Year	Current Year	Current Year	Current Year	Current Year
Current Year Necessary Small School (NSS) ADA	-	-	-	-	-	-
Funded NSS ADA	-	-	-	-	-	-
NSS ADA Funding Method(s)	-	-	-	-	-	-
<b>LCFF Entitlement Summary</b>						
Base Grant	\$1,766,516	\$2,055,202	\$3,114,408	\$4,307,505	\$4,478,117	\$4,662,203
Grade Span Adjustment	45,957	53,500	80,874	112,086	116,431	121,214
<b>Adjusted Base Grant</b>	<b>\$1,812,473</b>	<b>\$2,108,702</b>	<b>\$3,195,282</b>	<b>\$4,419,591</b>	<b>\$4,594,548</b>	<b>\$4,783,417</b>
Supplemental Grant	223,840	271,854	436,859	614,765	641,031	654,084
Concentration Grant	79,522	129,664	103,847	-	-	-
<b>Total Base, Supplemental and Concentration Grant</b>	<b>\$2,115,835</b>	<b>\$2,510,220</b>	<b>\$3,735,988</b>	<b>\$5,034,356</b>	<b>\$5,235,579</b>	<b>\$5,437,501</b>
Allowance: Necessary Small School	-	-	-	-	-	-
Add-on: Targeted Instructional Improvement Block Grant	-	-	-	-	-	-
Add-on: Home-to-School Transportation	-	-	-	-	-	-
Add-on: Small School District Bus Replacement Program	-	-	-	-	-	-
Add-on: Economic Recovery Target	-	-	-	-	-	-
Add-on: Transitional Kindergarten	-	-	-	-	-	-
<b>Total Allowance and Add-On Amounts</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>
<b>Total LCFF Entitlement Before Adjustments (excludes Additional State Aid)</b>	<b>\$2,115,835</b>	<b>\$2,510,220</b>	<b>\$3,735,988</b>	<b>\$5,034,356</b>	<b>\$5,235,579</b>	<b>\$5,437,501</b>
Miscellaneous Adjustments	-	-	-	-	-	-
<b>Total LCFF Entitlement (excludes Additional State Aid)</b>	<b>\$ 2,115,835</b>	<b>\$ 2,510,220</b>	<b>\$ 3,735,988</b>	<b>\$ 5,034,356</b>	<b>\$ 5,235,579</b>	<b>\$ 5,437,501</b>
LCFF Entitlement Per ADA (excludes Categorical MSA)	\$ 11,740	\$ 13,560	\$ 14,413	\$ 14,193	\$ 14,614	\$ 15,028
Additional State Aid	-	-	-	-	-	-
<b>Total LCFF Entitlement with Additional State Aid</b>	<b>2,115,835</b>	<b>2,510,220</b>	<b>3,735,988</b>	<b>5,034,356</b>	<b>5,235,579</b>	<b>5,437,501</b>
<b>LCFF Sources Summary</b>						
<b>Funding Source Summary</b>						
Local Revenue and In-Lieu of Property Taxes (net for school districts)	\$ 27,666	\$ 27,874	\$ 43,695	\$ 62,966	\$ 62,558	\$ 62,558
Education Protection Account Entitlement (includes \$200/minimum per ADA)	\$ 36,044	\$ 37,024	\$ 51,842	\$ 70,940	\$ 71,650	\$ 72,366
Net State Aid (excludes Additional State Aid)	\$ 2,052,125	\$ 2,445,322	\$ 3,640,451	\$ 4,900,449	\$ 5,101,372	\$ 5,302,577
Additional State Aid	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Funding Sources</b>	<b>\$ 2,115,835</b>	<b>\$ 2,510,220</b>	<b>\$ 3,735,988</b>	<b>\$ 5,034,356</b>	<b>\$ 5,235,579</b>	<b>\$ 5,437,501</b>
<b>Funding Source by Resource-Object</b>						
State Aid (Resource Code 0000, Object Code 8011)	\$ 2,052,125	\$ 2,445,322	\$ 3,640,451	\$ 4,900,450	\$ 5,101,371	\$ 5,302,577
EPA, Current Year (Resource 1400, Object Code 8012)	\$ 36,044	\$ 37,024	\$ 51,842	\$ 70,940	\$ 71,650	\$ 72,366
(P-2 plus Current Year Accrual)						
EPA, Prior Year Adjustment (Resource 1400, Object Code 8019)	\$ -	\$ 8	\$ 44	\$ -	\$ -	\$ -
(P-A less Prior Year Accrual)						
Property Taxes (Object Code 8021 to 8089)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
In-Lieu of Property Taxes (Object Code 8096)	27,666	27,874	43,695	62,966	62,558	62,558
<b>Entitlement and Source Reconciliation</b>						
Basic Aid/Excess Tax District Status	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total LCFF Entitlement	\$ 2,115,835	\$ 2,510,220	\$ 3,735,988	\$ 5,034,356	\$ 5,235,579	\$ 5,437,501
Additional State Aid	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional EPA Minimum Entitlement (excess to LCFF Entitlement)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Excess Taxes before Minimum State Aid	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Funding Sources</b>	<b>\$ 2,115,835</b>	<b>\$ 2,510,220</b>	<b>\$ 3,735,988</b>	<b>\$ 5,034,356</b>	<b>\$ 5,235,579</b>	<b>\$ 5,437,501</b>
<b>LCAP Percentage to Increase or Improve Services Calculation</b>						
Base Grant (Excludes add-ons for TIIG & Transportation)	\$ 1,812,473	\$ 2,108,702	\$ 3,195,282	\$ 4,419,591	\$ 4,594,548	\$ 4,783,417
Supplemental and Concentration Grant funding in the LCAP year	\$ 309,362	\$ 401,518	\$ 540,706	\$ 614,765	\$ 641,031	\$ 654,084
Projected Additional 15% Concentration Grant funding in the LCAP year	\$ 12,357	\$ 20,000	\$ 23,965	\$ -	\$ -	\$ -
Percentage to Increase or Improve Services	12.71%	16.04%	16.92%	13.91%	13.95%	13.67%





**TO: INSIGHT AT SAN JOAQUIN  
GOVERNING BOARD**

**APPROVED**

**BOARD REPORT # 03**

**VIA: INSIGHT STAFF**

December 9, 2024

**SUBJECT:** The ratification of disbursements made by Insight at San Joaquin from August 2024 through October 2024.

**PROPOSAL:**

It is proposed that the Governing Board of Insight at San Joaquin ratify the disbursements made by the school from August 2024 through October 2024.

**BACKGROUND:**

On a monthly basis, Insight at San Joaquin has been sending the board president a payment listing of all disbursements made each month, whether by check, or electronic payment processing, on behalf of the school. The monthly listing includes each payment date, reason for payment, account coding and amount. This board report presents the disbursements from August 2024 through October 2024.

**BUDGET IMPLICATIONS:**

The total disbursements for the months of August, September, and October were \$79,752, \$332,114, and \$667,762, respectively.

**RECOMMENDATIONS:**

It is recommended that the Governing Board ratify the disbursements made by Insight at San Joaquin from August 2024 through October 2024.

**RESPECTFULLY SUBMITTED**

Kimberly Odom  
Head of School

**PREPARED BY:**

Kimberly Odom Head of School	Dustin Kepler Accounts Payable Specialist
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**PRESENTED BY:**

Kimberly Odom Head of School	Francis "Paco" Burke Chief Business Official
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Ayes: 2

No: 0

Abstain: 1

Approved: Yes Witnessed: *Casey Robinson* Date: 12/9/2024

Name	Aye	No	Abstain	Absent	Moved	Second
Fred Vallerga	X					X
Deanna Vallerga	X				X	
Jason Jones			X			



**Insight School at San Joaquin  
Board Disbursements A/P Payment History  
August 01, 2024 - August 31, 2024**

<b>Vendor</b>	<b>Description</b>	<b>Total</b>
Insperty	PEO - Payroll Services and HR Admin Services provider	38,712.19
La Cheim School Inc.	Special Education Contracted Services - NPS Placement	16,083.66
SAN JOAQUIN COUNTY OF EDUCATION	STRS EE/ER Contribution	10,788.92
Green Hasson & Janks LLP	Audit Fees & Professional Services	6,135.00
Virtual Technologies Group	Computer equip. & installation	3,135.88
State Board of Equalization	Sales Tax	2,000.00
Rids Brother Company Inc	Transportation Services	1,360.00
School Pathways LLC	Annual Subscription	622.00
AXIS Teletherapy	Special Education Contracted Services - Speech Report Reviews	504.75
Effectual Educational Consulting Service	Special Education Services	150.00
Point Quest Pediatric Therapies, LLC	Special Education Contracted Services	101.25
Amazon Capital Services	Staff Office Supplies	82.58
Anchor Counseling & Education Solutions	Special Education Contracted Services	75.75
<b>Grand Total</b>		<b>79,751.98</b>



**K12 : SA : Full Financials CA Node : CAVAISSJ**  
**Board Disbursements A/P Payment History by Vendor**  
**August 01, 2024 - August 31, 2024**

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1923 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	08/22/2024	INV-07069		(25.75)
	Bill Payment	08/22/2024	1923		25.75
Bill Payment #1915 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	08/08/2024	INV-07050		(50.00)
	Bill Payment	08/08/2024	1915		50.00
					<b>0.00</b>
Bill Payment #ACH 08.09.2024 & 08.23.2024 - Insperty(Insight@San Joaquin)	Bill	08/30/2024	iSJ_AUG'24 PYRL	iSJ_AUG 2024 Var. PYRL Invs	(38,712.19)
	Bill Payment	08/30/2024	ACH 08.09.2024 & 08.23.2024	iSJ_AUG 2024 Var. PYRL Invs	38,712.19
					<b>0.00</b>
Bill Payment #ACH 08.22.2024 - State Board of Equalization(Insight@San Joaquin)	Bill	07/30/2024	ISSJ_JUL'24 PYRL	iSJ_Matrls/Comptr Use Tax_JUL 2024	(1,185.98)
	Bill	08/22/2024	ISSJ_JUL 2024_Use Tax Adj.	iSJ_Comptrs/Matrls Use Tax_JUL 2024 Adj.	(814.02)
	Bill Payment	08/22/2024	ACH 08.22.2024	iSJ_Comptrs/Matrls Use Tax_JUL 2024 Adj.	2,000.00
					<b>0.00</b>
Bill Payment #1916 - Axis Teletherapy(Insight @ San Joaquin)	Bill	08/08/2024	INV-00784		(504.75)
	Bill Payment	08/08/2024	1916		504.75
					<b>0.00</b>
Bill Payment #1928 - SAN JOAQUIN COUNTY OF EDUCATION	Bill	08/27/2024	iSJ_AUG 2024 STRS EE/ER Contrib	iSJ_AUG 2024 STRS EE/ER Contrib	(10,788.92)
	Bill Payment	08/27/2024	1928	iSJ_AUG 2024 STRS EE/ER Contrib	10,788.92
					<b>0.00</b>
Bill Payment #1922 - Point Quest Pediatric Therapies, LLC(Insight @ San Joaquin)	Bill	08/14/2024	INV-00190		(101.25)
	Bill Payment	08/15/2024	1922		101.25
					<b>0.00</b>
Bill Payment #1918 - Rids Brother Company Inc(Insight @ San Joaquin)	Bill	08/08/2024	1424		(1,360.00)
	Bill Payment	08/08/2024	1918		1,360.00
					<b>0.00</b>
Bill Payment #1921 - Green Hasson & Janks LLP(Insight@San Joaquin)	Bill	08/14/2024	93937		(2,575.00)
	Bill Payment	08/15/2024	1921		2,575.00
Bill Payment #1917 - Green Hasson & Janks LLP(Insight@San Joaquin)	Bill	08/08/2024	83936 - 10% Withheld		(3,560.00)
	Bill Payment	08/08/2024	1917		3,560.00
					<b>0.00</b>
Bill Payment #1926 - School Pathways LLC(Insight@San Joaquin)	Bill	08/22/2024	140-INV6740		(622.00)
	Bill Payment	08/22/2024	1926		622.00
					<b>0.00</b>
Bill Payment #1925 - La Cheim School Inc.(Insight@San Joaquin)	Bill	08/22/2024	081924		(16,083.66)
	Bill Payment	08/22/2024	1925		16,083.66
					<b>0.00</b>
Bill Payment #1927 - Virtual Technologies Group(Insight@San Joaquin)	Bill	08/22/2024	210502		(1,678.47)
	Bill Payment	08/22/2024	1927		1,678.47
Bill Payment #1919 - Virtual Technologies Group(Insight@San Joaquin)	Bill	08/08/2024	210157		(1,457.41)
	Bill Payment	08/08/2024	1919		1,457.41
					<b>0.00</b>
Bill Payment #1920 - Amazon Capital Services(Insight @ San Joaquin)	Bill	08/14/2024	1TNY-JRWM-CJTF		(82.58)
	Bill Payment	08/15/2024	1920		82.58
					<b>0.00</b>
Bill Payment #1924 - Effectual Educational Consulting Service(Insight@San Joaquin)	Bill	08/22/2024	INV-08529		(150.00)
	Bill Payment	08/22/2024	1924		150.00
					<b>0.00</b>
					<b>0.00</b>
<b>Total</b>					<b>79,751.98</b>



## Transaction Summary

### Insight at San Joaquin

Vendor	Amount
IXL Learning Inc.	4,252.65
Document Tracking Services	3,182.89
Law Offices of Young, Minney & Corr, LLP	334.93
NCS Pearson, Inc.	241.93
AppleOne Employment Services	200.72
Smile From The Inside, Inc.	184.91
Effectual Educational Consulting Service	168.17
Bill.com	110.69
FusionPlus Inc	92.45
Expedited Reports	80.56
County Fire Protection	70.12
Robert Half Inc.	65.30
UPS	54.13
DataBasics, Inc.	43.39
The Back Room Inc	42.40
Supreme Facility Services, Inc.	40.56
Amazon	38.83
De Lage Landen Financial Services Inc.	31.91
Barrington Staffing Services	31.84
AT&T Mobility	31.10
Adobe Inc.	30.32
Southern California Edison	29.15
Comm-Core	25.67
Sovos Compliance LLC	14.95
San Joaquin County Office of Education	14.79
Quill Corporation	13.73
City of Simi Valley	13.43
Red Robin	10.74
Verizon Wireless	10.09
Crisis Prevention Institute	7.40
Carmen Gomez Ruiz	7.40
Certified Languages International	6.75
Sparkletts	6.29
Waste Management	5.18
Everon, LLC	5.17
ADT Commercial	5.12
Pitney Bowes Bank Inc Purchase Power	5.08
Viva La Pasta	4.23
VC Tax Collector	3.20
Western Exterminator Company	3.08
Successories.com	3.01
Paper Recycling & Shredding	2.66





**Transaction Summary**  
**Insight at San Joaquin**

<b>Vendor</b>	<b>Amount</b>
Doctors Wellness Company LLC dba WellnessMart MD	1.53
Target	0.89
<b>Grand Total</b>	<b>9,529.34</b>



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	i-SI
Carmen Gomez Ruiz	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 3006	July (7/29)	600.00	7.40
	Operations and Housekeeping Services Total					600.00	7.40
<b>Carmen Gomez Ruiz Total</b>						<b>600.00</b>	<b>7.40</b>
Paper Recycling & Shredding	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 579552	July (7/25)	108.00	1.33
	Office Expense Total			LLC 580599	August (8/08)	108.00	1.33
<b>Paper Recycling &amp; Shredding Total</b>						<b>216.00</b>	<b>2.66</b>
UPS	Shipping	54302 Postage & Delivery Expense : Messenger & Delivery	101 General	LLC 000073Y68E304	July (7/27)	205.35	2.53
				LLC 000073Y68E314	August (8/03)	385.12	4.75
				LLC 000073Y68E324	August (8/10)	421.07	5.19
				LLC 000073Y68E334	August (8/17)	553.52	6.82
			280 SPED	LLC 0000V9159W304	July (7/27)	177.90	3.39
				LLC 0000V9159W314	August (8/03)	338.66	6.46
				LLC 0000V9159W324	August (8/10)	584.04	11.14
				LLC 0000V9159W334	August (8/17)	726.73	13.86
	Shipping Total					3,392.39	54.13
<b>UPS Total</b>						<b>3,392.39</b>	<b>54.13</b>
Waste Management	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 6958079-0283-5	August	167.38	2.06
	Operations and Housekeeping Services Total			LLC 6958095-0283-1	August	253.00	3.12
<b>Waste Management Total</b>						<b>420.38</b>	<b>5.18</b>
Barrington Staffing Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 43862	July (7/21)	440.58	5.43
				LLC 43879	July (7/28)	429.30	5.29
				LLC 43899	August (8/04)	1,265.08	15.59
				LLC 43921	August (8/11)	447.90	5.52
	Outside Service Total					2,582.86	31.84
<b>Barrington Staffing Services Total</b>						<b>2,582.86</b>	<b>31.84</b>
FusionPlus Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-1013	August	7,500.00	92.45
	Outside Service-General Total					7,500.00	92.45
<b>FusionPlus Inc Total</b>						<b>7,500.00</b>	<b>92.45</b>
Law Offices of Young, Minney & Corr, LLP	Legal Fees	51807 Professional Svcs & Outside Labor : Legal	101 General	LLC 11671	July	5,300.00	0.00
				LLC 11727	July	1,012.50	334.93
			280 SPED	LLC 11671	July	975.00	0.00
	Legal Fees Total					7,287.50	334.93
<b>Law Offices of Young, Minney &amp; Corr, LLP Total</b>						<b>7,287.50</b>	<b>334.93</b>
Document Tracking Services	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	410 SUPP - Transcripts	LLC FT9306534	July	975.00	0.00
			320 Supp - ELD Services	LLC T-930650075	July	12,876.82	2,721.74
	Outside Service-General Total					13,851.82	2,721.74
	Prepaid Other	13514 Prepaid Other	410 SUPP - Transcripts	LLC 9306516	August (8/15)	5,500.00	461.15
	Prepaid Other Total					5,500.00	461.15
<b>Document Tracking Services Total</b>						<b>19,351.82</b>	<b>3,182.89</b>
Verizon Wireless	Telephone - Administration	56504 Program Fees & Other Instructional : Admin - Telephone	101 General	LLC 9970605340	July	818.24	10.09
	Telephone - Administration Total					818.24	10.09
<b>Verizon Wireless Total</b>						<b>818.24</b>	<b>10.09</b>
Certified Languages International	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	320 Supp - ELD Services	LLC 74586073124	July	174.00	6.75
	Outside Service-General Total					174.00	6.75
<b>Certified Languages International Total</b>						<b>174.00</b>	<b>6.75</b>
Comm-Core	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 1091160	August	2,082.52	25.67
	Communications Total					2,082.52	25.67
<b>Comm-Core Total</b>						<b>2,082.52</b>	<b>25.67</b>
Supreme Facility Services, Inc.	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 4040	August	3,290.00	40.56
	Operations and Housekeeping Services Total					3,290.00	40.56
<b>Supreme Facility Services, Inc. Total</b>						<b>3,290.00</b>	<b>40.56</b>
Amazon	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	No receipt - Paco approved	July	10.37	0.13
				113-3603914-0696226	July	207.95	2.56
				113-2525299-1076219	July	12.48	0.15
				113-8921134-3393012	July	116.57	1.44
				113-4007519-6973853	July	10.67	0.13
				113-4266984-1670663	July	132.65	1.64
				113-9253162-3930624	July	16.40	0.20
				113-1487638-0794657	July	32.15	0.40
				113-9402938-9049851	July	71.15	0.88
				113-3901666-9968243	July	107.02	1.32
				113-7077520-4809835	August	40.58	0.50
				113-8771659-0119441	August	73.87	0.91
				113-5091950-3633811	August	29.59	0.36
				113-9870109-4676239	August	661.79	8.16
				113-2659394-8529040	August	10.60	0.13
				113-7267636-2997821	August	56.20	0.69
				113-2124738-0150619	August	17.05	0.21
				113-0967797-3241838	August	93.30	1.15
				113-3878879-8594623	August	424.68	5.24
				113-1434776-6192245	August	80.95	1.00
				113-7303818-6409853	August	29.96	0.37
				111-1467997-0431427	August	173.60	2.14
				111-5818839-0232202	August	74.97	0.92
				111-9297306-3654635	August	136.08	1.68
				111-7253223-2708242	August	21.12	0.26
				111-5792404-6013058	August	309.71	3.82
				111-321272-1371405	August	19.28	0.24
				111-7607258-3828246	August	23.37	0.29
				111-8068477-2307417	August	86.02	1.06
				111-6219620-2117030	August	69.61	0.86
	Office Expense Total					3,149.74	38.83
<b>Amazon Total</b>						<b>3,149.74</b>	<b>38.83</b>
Quill Corporation	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 39845233	August (8/01)	1,113.97	13.73
	Office Expense Total					1,113.97	13.73
<b>Quill Corporation Total</b>						<b>1,113.97</b>	<b>13.73</b>
AT&T Mobility	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 80557846671578 072824	August	774.52	9.55
	Communications Total			LLC 2064403907	July	1,748.36	21.55
<b>AT&amp;T Mobility Total</b>						<b>2,522.88</b>	<b>31.10</b>



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	i-SJ
The Back Room Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-3074	July (7/31)	3,440.00	42.40
	Outside Service-General Total					3,440.00	42.40
<b>The Back Room Inc Total</b>						<b>3,440.00</b>	<b>42.40</b>
AppleOne Employment Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 01-6918870 LLC 01-6923923 LLC 01-6927579 LLC 01-6931563	July (7/20) July (7/27) August (8/07) August (8/14)	5,416.75 4,600.27 851.92 16,283.24	66.77 56.71 10.50 200.72
	Outside Service Total					16,283.24	200.72
<b>AppleOne Employment Services Total</b>						<b>16,283.24</b>	<b>200.72</b>
Doctors Wellness Company LLC dba WellnessMart MD	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-4252	July (7/31)	124.00	1.53
	Outside Service-General Total					124.00	1.53
<b>Doctors Wellness Company LLC dba WellnessMart MD Total</b>						<b>124.00</b>	<b>1.53</b>
Bill.com	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	24088107167	August	1,439.00	110.69
	Dues and Memberships Total					1,439.00	110.69
<b>Bill.com Total</b>						<b>1,439.00</b>	<b>110.69</b>
Southern California Edison	Utilities	53302 Rent and Utilities : Utilities, CAM, and Real Estate	101 General	LLC 700203189681 081224	July	2,364.74	29.15
	Utilities Total					2,364.74	29.15
<b>Southern California Edison Total</b>						<b>2,364.74</b>	<b>29.15</b>
Solution Tree	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	160 EDUEFF	LLC 5303943 LLC 5305211 LLC QS128372 LLC 5305652	July (7/08) July (7/29) August (8/07) July (7/31)	14,700.00 1,244.50 4,200.00 46,104.50	0.00 0.00 0.00 0.00
	Teacher Training Total		630 Title III			46,104.50	0.00
<b>Solution Tree Total</b>						<b>46,104.50</b>	<b>0.00</b>
De Lage Landen Financial Services Inc.	Equipment Rental Expense	55304 Facilities & Equipment Rental Expense : Equipment Rental	101 General	LLC 82916124	August	2,588.36	31.91
	Equipment Rental Expense Total					2,588.36	31.91
<b>De Lage Landen Financial Services Inc. Total</b>						<b>2,588.36</b>	<b>31.91</b>
DataBasics, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 0813575	August	3,520.00	43.39
	Outside Service-General Total					3,520.00	43.39
<b>DataBasics, Inc. Total</b>						<b>3,520.00</b>	<b>43.39</b>
ADT Commercial	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 155659523	August	415.43	5.12
	Operations and Housekeeping Services Total					415.43	5.12
<b>ADT Commercial Total</b>						<b>415.43</b>	<b>5.12</b>
Pitney Bowes Bank Inc Purchase Power	Postage	54301 Postage & Delivery Expense : Postage	101 General	LLC 8000-9090-1005-2145 081624	August	412.26	5.08
	Postage Total					412.26	5.08
<b>Pitney Bowes Bank Inc Purchase Power Total</b>						<b>412.26</b>	<b>5.08</b>
Sparkletts	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 15182654 012124 LLC 15182654 080424	January (1/21) August (8/04)	305.27 510.61	3.76 6.29
	Office Expense Total					510.61	6.29
<b>Sparkletts Total</b>						<b>510.61</b>	<b>6.29</b>
The Stepping Stones Group LLC	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC M0207858-1	June (6/05)	697.50	0.00
	Subagreements for Services Total					697.50	0.00
<b>The Stepping Stones Group LLC Total</b>						<b>697.50</b>	<b>0.00</b>
Smile From The Inside, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 2205	August	15,000.00	184.91
	Outside Service-General Total					15,000.00	184.91
<b>Smile From The Inside, Inc. Total</b>						<b>15,000.00</b>	<b>184.91</b>
Western Exterminator Company	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 66130506	August (8/07)	249.60	3.08
	Operations and Housekeeping Services Total					249.60	3.08
<b>Western Exterminator Company Total</b>						<b>249.60</b>	<b>3.08</b>
Successories.com	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	S440657 SO-622633 / S440657	July August	122.23 244.46	1.51 3.01
	Office Expense Total					244.46	3.01
<b>Successories.com Total</b>						<b>244.46</b>	<b>3.01</b>
City of Simi Valley	Utilities	53302 Rent and Utilities : Utilities, CAM, and Real Estate	101 General	LLC 70816845	August (8/14)	1,089.23	13.43
	Utilities Total					1,089.23	13.43
<b>City of Simi Valley Total</b>						<b>1,089.23</b>	<b>13.43</b>
Robert Half Inc.	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 63859799 LLC 63889668 LLC 63917598 LLC 63938441 LLC 63966771	July (7/23) July (7/30) August (8/02) August (8/09) August (8/16)	1,410.34 1,409.63 319.20 1,594.40 5,297.49	17.39 17.38 3.93 19.65 65.30
	Outside Service Total					5,297.49	65.30
<b>Robert Half Inc. Total</b>						<b>5,297.49</b>	<b>65.30</b>
County Fire Protection	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 24-30780	August (8/05)	5,688.00	70.12
	Outside Service-General Total					5,688.00	70.12
<b>County Fire Protection Total</b>						<b>5,688.00</b>	<b>70.12</b>
Reading Horizons	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC INV70644	July (7/24)	8,239.19	0.00
	Non K12 Curriculum Total					8,239.19	0.00
<b>Reading Horizons Total</b>						<b>8,239.19</b>	<b>0.00</b>
Arthur J Gallagher	Prepaid Other	13514 Prepaid Other	101 General	LLC 5218719	July (7/19)	352,677.15	0.00
	Prepaid Other Total					352,677.15	0.00
<b>Arthur J Gallagher Total</b>						<b>352,677.15</b>	<b>0.00</b>
NCS Pearson, Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC 25711004	July (7/22)	12,688.31	241.93
	Non K12 Curriculum Total					12,688.31	241.93
<b>NCS Pearson, Inc. Total</b>						<b>12,688.31</b>	<b>241.93</b>
Adobe Inc.	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	LLC 2827897543	July (7/24)	2,460.00	30.32
	Dues and Memberships Total					2,460.00	30.32
<b>Adobe Inc. Total</b>						<b>2,460.00</b>	<b>30.32</b>
Classwork Co DBA Classkick	Prepaid Other	13514 Prepaid Other	840 LREBG	LLC 2021-12193	July (7/24)	20,998.95	0.00
	Prepaid Other Total					20,998.95	0.00
<b>Classwork Co DBA Classkick Total</b>						<b>20,998.95</b>	<b>0.00</b>
Crestline Specialties, Inc.	56703 - Program Fees & Other Instructional : Other Student Expenses - K12	56703 Program Fees & Other Instructional : Other Student Expenses - K12	330 SUPP - Engagement	LLC 3960355	July (7/25)	10,385.21	0.00





Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	i-SJ
Crestline Specialties, Inc	56703 - Program Fees & Other Instructional : 56703 - Program Fees & Other Instructional : Other Student Expenses - K12 Total	56703 Program Fees & Other	330 SUPP -	LLC 3979299	July (7/25)	784.70 11,169.91	0.00 0.00
<b>Crestline Specialties, Inc Total</b>						<b>11,169.91</b>	<b>0.00</b>
Crisis Prevention Institute	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	101 General	LLC NAIN-094436 LLC NAIN-100806 LLC NAIN-100821	July (7/13) August (8/05) August (8/05)	200.00 200.00 600.00	2.47 2.47 7.40
	<b>Teacher Training Total</b>					<b>600.00</b>	<b>7.40</b>
<b>Crisis Prevention Institute Total</b>						<b>600.00</b>	<b>7.40</b>
Effectual Educational Consulting Service	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC 12083 LLC 12594	January (1/31) June (6/30)	2,940.00 8,820.00	56.06 168.17
	<b>Subagreements for Services Total</b>					<b>8,820.00</b>	<b>168.17</b>
<b>Effectual Educational Consulting Service Total</b>						<b>4,225.00</b>	<b>80.56</b>
Expedited Reports	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC 1138	July (7/27)	4,225.00	80.56
	<b>Subagreements for Services Total</b>					<b>4,225.00</b>	<b>80.56</b>
<b>Expedited Reports Total</b>						<b>4,225.00</b>	<b>80.56</b>
Mystery Science C/O Discovery Education Inc	Prepaid Other	13514 Prepaid Other	840 LREBG	LLC 247232	July (7/23)	1,495.00	0.00
	<b>Prepaid Other Total</b>					<b>1,495.00</b>	<b>0.00</b>
<b>Mystery Science C/O Discovery Education Inc Total</b>						<b>1,495.00</b>	<b>0.00</b>
NASSP	Prepaid Other	13514 Prepaid Other	330 SUPP - Engagement	LLC 9001789537 LLC 9001789538 LLC 9001789539	January (1/15) January (1/15) January (1/15)	385.00 385.00 1,155.00	0.00 0.00 0.00
	<b>Prepaid Other Total</b>					<b>1,155.00</b>	<b>0.00</b>
<b>NASSP Total</b>						<b>1,155.00</b>	<b>0.00</b>
San Joaquin County Office of Education	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	LLC 243380	July (7/22)	1,200.00	14.79
	<b>Dues and Memberships Total</b>					<b>1,200.00</b>	<b>14.79</b>
<b>San Joaquin County Office of Education Total</b>						<b>1,200.00</b>	<b>14.79</b>
TalkingPoints	Program Fees & Other Instructional : Miscellaneous	56303 Program Fees & Other Instructional : Miscellaneous	560 Title I	LLC 3568	July (7/10)	31,200.00	0.00
	<b>Program Fees &amp; Other Instructional : Miscellaneous Total</b>					<b>31,200.00</b>	<b>0.00</b>
<b>TalkingPoints Total</b>						<b>31,200.00</b>	<b>0.00</b>
VC Tax Collector	Sales and Use Tax	67199 SG&A - Taxes & Licenses Expense : Sales and Use Tax	101 General	LLC 202402000147	July (7/29)	259.21	3.20
	<b>Sales and Use Tax Total</b>					<b>259.21</b>	<b>3.20</b>
<b>VC Tax Collector Total</b>						<b>259.21</b>	<b>3.20</b>
Rosetta Stone LLC	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	360 SUPP - ELD Support	LLC R5507491	August (8/12)	11,095.00	0.00
	<b>Non K12 Curriculum Total</b>					<b>11,095.00</b>	<b>0.00</b>
<b>Rosetta Stone LLC Total</b>						<b>11,095.00</b>	<b>0.00</b>
Sovos Compliance LLC	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-SCL-159965	June (6/26)	1,212.60	14.95
	<b>Outside Service-General Total</b>					<b>1,212.60</b>	<b>14.95</b>
<b>Sovos Compliance LLC Total</b>						<b>1,212.60</b>	<b>14.95</b>
Bowlero	School Event	56328 Program Fees & Other Instructional : Program Fees - School Events Expense	330 SUPP - Engagement	LLC 073124	July (7/31)	15,995.95	0.00
	<b>School Event Total</b>					<b>15,995.95</b>	<b>0.00</b>
<b>Bowlero Total</b>						<b>15,995.95</b>	<b>0.00</b>
Everon, LLC	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 156002503	August (8/07)	419.61	5.17
	<b>Operations and Housekeeping Services Total</b>					<b>419.61</b>	<b>5.17</b>
<b>Everon, LLC Total</b>						<b>419.61</b>	<b>5.17</b>
Global Online Language Services US Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	360 SUPP - ELD Support	LLC INV-1406277430	August (8/13)	8,999.00	0.00
	<b>Non K12 Curriculum Total</b>					<b>8,999.00</b>	<b>0.00</b>
<b>Global Online Language Services US Inc. Total</b>						<b>8,999.00</b>	<b>0.00</b>
IXL Learning Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED 840 LREBG 730 CSI	LLC 5507431 LLC 5507431 LLC 5507431	August (8/12) August (8/12) August (8/12)	11,102.09 7,195.80 64,351.00	0.00 2,398.36 4,252.65
	<b>Non K12 Curriculum Total</b>					<b>64,351.00</b>	<b>4,252.65</b>
<b>IXL Learning Inc. Total</b>						<b>64,351.00</b>	<b>4,252.65</b>
Liminex, Inc	Materials and Supplies	56334 Program Fees & Other Instructional : Program Fees - Non K12 Teacher Materials	840 LREBG	LLC INV-118269	July (7/01)	56,500.00	0.00
	<b>Materials and Supplies Total</b>					<b>56,500.00</b>	<b>0.00</b>
<b>Liminex, Inc Total</b>						<b>56,500.00</b>	<b>0.00</b>
Virtual Technologies Group	Computer Expense	54811 Computer & Maintenance Expense : Repairs & Maintenance	101 General	LLC 210469	August (8/16)	79,960.65	0.00
	<b>Computer Expense Total</b>					<b>79,960.65</b>	<b>0.00</b>
<b>Virtual Technologies Group Total</b>						<b>79,960.65</b>	<b>0.00</b>
Target	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	7242024	July	71.99	0.89
	<b>Office Expense Total</b>					<b>71.99</b>	<b>0.89</b>
<b>Target Total</b>						<b>71.99</b>	<b>0.89</b>
Viva La Pasta	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	37972	July	343.20	4.23
	<b>Office Expense Total</b>					<b>343.20</b>	<b>4.23</b>
<b>Viva La Pasta Total</b>						<b>343.20</b>	<b>4.23</b>
Red Robin	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	688175 8192024	August August	907.41 (36.30)	11.19 (0.45)
	<b>Office Expense Total</b>					<b>871.11</b>	<b>10.74</b>
<b>Red Robin Total</b>						<b>871.11</b>	<b>10.74</b>
<b>Grand Total</b>						<b>856,978.55</b>	<b>9,529.34</b>





**Insight School at San Joaquin  
Board Disbursements A/P Payment History  
September 01, 2024 - September 30, 2024**

Vendor	Description	Total
California Virtual Academy @ LA	Intercompany Settlement	128,759.00
Insight @ San Diego	Intercompany Settlement	89,647.00
Insperty	PEO - Payroll Services and HR Admin Services provider	45,394.43
California Virtual Academy @ San Diego	Intercompany Settlement	33,092.00
San Joaquin County of Education	STRS EE/ER Contribution	12,475.39
East Valley Education Center, Inc	Special Education Contracted Services	5,380.00
State Board of Equalization	Sales Tax	4,000.00
Green Hasson & Janks LLP	Audit Fees & Professional Services	3,296.00
National TeleTherapy Resources, a Speech Pathology Corp.	Special Education Contracted Services	2,034.01
Accrediting Commission for Schools	Annual Accreditation Membership Fee	1,230.00
San Joaquin County Office of Education	Annual Subscription	1,056.00
Communicology, Inc., DBA, TeleSesh	Special Education Contracted Services	867.50
Chase Boyle dba Snow Counseling	Special Education Contracted Services	705.00
Axis Teletherapy	Special Education Contracted Services - Speech Report Reviews	702.11
Anchor Counseling & Education Solutions	Special Education Contracted Services	616.00
E-Therapy Intermediate, INC	Special Education Contracted Services	593.13
TheraStaffers	Special Education Contracted Services - Speech and Language Therapy	516.67
PrentGraf Ltd dba TalkPath Live	Special Education Contracted Services	353.50
Speech Guy, LLC	Special Education Contracted Services	312.87
California Teachers Association	Union Dues	248.00
TinyEYE Technology Corporation	Special Education Contracted Services	168.00
PresenceLearning, Inc.	Special Education Contracted Services - Speech and Language Therapy	165.63
Point Quest Pediatric Therapies, LLC	Special Education Contracted Services	129.38
Sally Gonzalez	Special Education Professional Services	125.00
eLuma	Special Individual Counseling Services	122.00
Effectual Educational Consulting Service	Special Education Services	100.00
Inspire Education Center, LLC	Special Education Contracted Services	25.00
<b>Grand Total</b>		<b>332,113.62</b>



**K12 : SA : Full Financials CA Node : CAVAISSJ**  
**Board Disbursements A/P Payment History by Vendor**  
**September 01, 2024 - September 30, 2024**

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1944 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	09/21/2024	INV-07133		(239.75)
	Bill Payment	09/23/2024	1944		239.75
Bill Payment #1933 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	09/14/2024	INV-07096		(376.25)
	Bill Payment	09/16/2024	1933		376.25
					0.00
Bill Payment #ACH 09.10.2024 & 09.25.2024 - Insperty(Insight@San Joaquin)	Bill	09/30/2024	iSJ_SEP'24 PYRL	iSJ_SEP 2024 Var. PYRL Invs	(45,394.43)
	Bill Payment	09/30/2024	ACH 09.10.2024 & 09.25.2024	iSJ_SEP 2024 Var. PYRL Invs	45,394.43
					0.00
Bill Payment #ACH 09.09.2024 (Use Tax) - State Board of Equalization(Insight@San Joaquin)	Bill	08/21/2024	iSJ_AUG 2024_Use Tax	iSJ_Matrls/Comptr Use Tax_AUG 2024	(3,887.40)
	Bill	09/09/2024	iSJ_AUG'24_Use Tax Adj.	iSJ_Matrls/Comptr Use Tax_AUG 2024 Adj.	(112.60)
	Bill Payment	09/09/2024	ACH 09.09.2024 (Use Tax)	iSJ_Matrls/Comptr Use Tax_AUG 2024 & Adj.	4,000.00
					0.00
Bill Payment #1934 - Axis Teletherapy(Insight @ San Joaquin)	Bill	09/14/2024	INV-00833		(127.44)
	Bill	09/14/2024	INV-00820		(574.67)
	Bill Payment	09/16/2024	1934		702.11
					0.00
Bill Payment #1960 - SAN JOAQUIN COUNTY OF EDUCATION	Bill	09/26/2024	iSJ_SEP 2024 STRS EE/ER Contrib	iSJ_SEP 2024 STRS EE/ER Contrib	(12,470.92)
	Bill Payment	09/26/2024	1960	iSJ_SEP 2024 STRS EE/ER Contrib	12,470.92
					0.00
Bill Payment #1951 - Point Quest Pediatric Therapies, LLC(Insight @ San Joaquin)	Bill	09/21/2024	INV-00195		(129.38)
	Bill Payment	09/23/2024	1951		129.38
					0.00
Bill Payment #1938 - Green Hasson & Janks LLP(Insight@San Joaquin)	Bill	09/14/2024	94659		(3,296.00)
	Bill Payment	09/16/2024	1938		3,296.00
					0.00
Bill Payment #1949 - Effectual Educational Consulting Service(Insight@San Joaquin)	Bill	09/21/2024	INV-08614		(100.00)
	Bill Payment	09/23/2024	1949		100.00
					0.00
Bill Payment #1929 - Accrediting Commission for Schools(Insight@San Joaquin)	Bill	09/07/2024	1325767		(1,230.00)
	Bill Payment	09/09/2024	1929		1,230.00
					0.00
Bill Payment #1930 - California Teachers Association(Insight@San Joaquin)	Bill	09/07/2024	Union Dues - 082024		(248.00)
	Bill Payment	09/09/2024	1930		248.00
					0.00
					(89.46)
Bill Payment #1950 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	09/21/2024	INV-07074		
	Bill	09/21/2024	INV-07088		(66.50)
	Bill	09/21/2024	INV-07089		(29.50)
	Bill	09/21/2024	INV-06980		(202.47)
	Bill Payment	09/23/2024	1950		387.93
					(151.25)
Bill Payment #1940 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	09/14/2024	INV-06888		
	Bill	09/14/2024	INV-06981		(66.50)
	Bill	09/14/2024	INV-06982		(66.50)
	Bill	09/14/2024	INV-06983		(66.50)
	Bill	09/14/2024	INV-06984		(88.50)
	Bill	09/14/2024	INV-06985		(56.50)
	Bill Payment	09/16/2024	1940		495.75
					(497.48)
Bill Payment #1931 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	09/07/2024	INV-06853		
	Bill	09/07/2024	INV-06895		(652.85)
	Bill Payment	09/09/2024	1931		1,150.33
					0.00
Bill Payment #1932 - San Joaquin County of Education(Insight@San Joaquin)	Bill	09/07/2024	2024_06 - STRS P&I		(4.25)
	Bill	09/07/2024	2024_03 - STRS P&I		(0.22)
	Bill Payment	09/09/2024	1932		4.47
					0.00
Bill Payment #1945 - Chase Boyle dba Snow Counseling(Insight @ San Joaquin)	Bill	09/21/2024	INV-00388		(240.00)
	Bill Payment	09/23/2024	1945		240.00



**K12 : SA : Full Financials CA Node : CAVAISSJ**  
**Board Disbursements A/P Payment History by Vendor**  
**September 01, 2024 - September 30, 2024**

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1935 - Chase Boyle dba Snow Counseling(Insight @ San Joaquin)	Bill	09/14/2024	INV-00365		(465.00)
	Bill Payment	09/16/2024	1935		465.00
					<b>0.00</b>
Bill Payment #1946 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill	09/21/2024	INV-00060		(125.00)
	Bill	09/21/2024	INV-00081		(275.00)
	Bill	09/21/2024	INV-00088		(45.00)
	Bill Payment	09/23/2024	1946		445.00
					(45.00)
Bill Payment #1936 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill	09/14/2024	INV-00024		
	Bill	09/14/2024	INV-00020		(226.25)
	Bill	09/14/2024	INV-00038		(151.25)
	Bill Payment	09/16/2024	1936		422.50
					<b>0.00</b>
Bill Payment #1937 - eLuma(Insight@San Joaquin)	Bill	09/14/2024	VST-01082		(122.00)
	Bill Payment	09/16/2024	1937		122.00
					<b>0.00</b>
Bill Payment #1939 - Inspire Education Center, LLC(Insight @ San Joaquin)	Bill	09/14/2024	INV-00006		(25.00)
	Bill Payment	09/16/2024	1939		25.00
					<b>0.00</b>
Bill Payment #1941 - PrentGraf Ltd dba TalkPath Live(Insight @ San Joaquin)	Bill	09/14/2024	INV-00894		(353.50)
	Bill Payment	09/16/2024	1941		353.50
					<b>0.00</b>
Bill Payment #1955 - Speech Guy, LLC(Insight @ San Joaquin)	Bill	09/21/2024	INV-01110		(159.04)
	Bill Payment	09/23/2024	1955		159.04
					(153.83)
Bill Payment #1942 - Speech Guy, LLC(Insight @ San Joaquin)	Bill	09/14/2024	INV-01098		
	Bill Payment	09/16/2024	1942		153.83
					<b>0.00</b>
Bill Payment #1943 - TheraStaffers(Insight @ San Joaquin)	Bill	09/14/2024	INV-00566		(310.00)
	Bill	09/14/2024	INV-00577		(206.67)
	Bill Payment	09/16/2024	1943		516.67
					<b>0.00</b>
Bill Payment #1947 - E-Therapy Intermediate, INC(Insight @ San Joaquin)	Bill	09/21/2024	INV-07874		(593.13)
	Bill Payment	09/23/2024	1947		593.13
					<b>0.00</b>
Bill Payment #1948 - East Valley Education Center, Inc(Insight @ San Joaquin)	Bill	09/21/2024	14876-3687A		(5,380.00)
	Bill Payment	09/23/2024	1948		5,380.00
					<b>0.00</b>
Bill Payment #1952 - PresenceLearning, Inc.(Insight @ San Joaquin)	Bill	09/21/2024	INV-08868		(165.63)
	Bill Payment	09/23/2024	1952		165.63
					<b>0.00</b>
Bill Payment #1953 - Sally Gonzalez(Insight @ San Joaquin)	Bill	09/21/2024	INV-00272		(125.00)
	Bill Payment	09/23/2024	1953		125.00
					<b>0.00</b>
Bill Payment #1954 - San Joaquin County Office of Education(Insight @ San Joaquin)	Bill	09/21/2024	AR25-00034		(1,056.00)
	Bill Payment	09/23/2024	1954		1,056.00
					<b>0.00</b>
Bill Payment #1956 - TinyEYE Technology Corporation(Insight @ San Joaquin)	Bill	09/21/2024	INV-00572		(168.00)
	Bill Payment	09/23/2024	1956		168.00
					<b>0.00</b>
Bill Payment #1957 - California Virtual Academy @ LA(Insight@San Joaquin)	Bill	09/25/2024	ISJ_SEP'24 Interco_LA	Intercompany Settlement SEP 2024	(128,759.00)
	Bill Payment	09/25/2024	1957	Intercompany Settlement SEP 2024	128,759.00
					<b>0.00</b>
Bill Payment #1958 - California Virtual Academy @ San Diego(Insight@San Joaquin)	Bill	09/25/2024	ISJ_SEP'24 Interco_SD (Corr)	Intercompany Settlement SEP 2024	(33,092.00)
	Bill Payment	09/25/2024	1958	Intercompany Settlement SEP 2024	33,092.00
					(33,092.00)
Bill Credit #Void_ISJ_SEP'24 Interco_SD_Incorrect Fund - California Virtual Academy @ San Diego(Insight@San Joaquin)	Bill	09/25/2024	ISJ_SEP'24 Interco_SD	Intercompany Settlement SEP 2024	
	Bill Credit	09/25/2024	Void_ISJ_SEP'24 Interco_SD_Incorrect Fund	Intercompany Settlement SEP 2024_Void - Incorrect Fund	33,092.00
					<b>0.00</b>



K12 : SA : Full Financials CA Node : CAVAISSJ  
 Board Disbursements A/P Payment History by Vendor  
 September 01, 2024 - September 30, 2024

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1959 - Insight @ San Diego(Insight@San Joaquin)	Bill	09/25/2024	iSJ_SEP'24 Interco_ISD	Intercompany Settlement SEP 2024	(89,647.00)
	Bill Payment	09/25/2024	1959	Intercompany Settlement SEP 2024	89,647.00
					0.00
					0.00
<b>Total</b>					<b>332,113.62</b>





## Transaction Summary

### Insight at San Joaquin

Vendor	Amount
Law Offices of Young, Minney & Corr, LLP	973.37
Zoom Video Communications, Inc.	567.47
Reading Horizons	270.56
Smile From The Inside, Inc.	184.91
Barrington Staffing Services	178.99
Robert Half Inc.	166.46
UPS	146.71
AppleOne Employment Services	134.64
Bill.com	112.61
Pitney Bowes Bank Inc Purchase Power	112.54
Speech Guy, LLC	106.78
Integration Inc.	103.56
FusionPlus Inc	92.45
Crisis Prevention Institute	68.30
Effectual Educational Consulting Service	60.06
DataBasics, Inc.	58.91
Amazon	57.20
The Back Room Inc	42.40
Certified Languages International	40.63
Supreme Facility Services, Inc.	40.56
De Lage Landen Financial Services Inc.	38.74
Southern California Edison	33.77
AT&T Mobility	31.17
Vogue Sign Company	28.93
Comm-Core	25.17
Verizon Wireless	21.11
The Silly Room	20.03
Quill Corporation	12.97
Pitney Bowes Global Financial Services	9.42
ULINE	8.82
AXIS Teletherapy	8.68
Doctors Wellness Company LLC dba WellnessMart MD	7.64
Carmen Gomez Ruiz	7.40
Everon, LLC	6.48
Augmentative Communications Solutions	6.32
Waste Management	5.18
Sparkletts	3.76
City Printing Graphics	3.55
Western Exterminator Company	3.08
Paper Recycling & Shredding	2.66
Little Caesars	2.42
<b>Grand Total</b>	<b>3,806.42</b>



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	I-SJ
Carmen Gomez Ruiz	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 3007	August	600.00	7.40
	Operations and Housekeeping Services Total					600.00	7.40
<b>Carmen Gomez Ruiz Total</b>						<b>600.00</b>	<b>7.40</b>
Paper Recycling & Shredding	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 581644	August (8/22)	108.00	1.33
	Office Expense Total			LLC 582612	September (9/05)	108.00	1.33
						216.00	2.66
<b>Paper Recycling &amp; Shredding Total</b>						<b>216.00</b>	<b>2.66</b>
UPS	Shipping	54302 Postage & Delivery Expense : Messenger & Delivery	101 General	LLC 000073Y68E344	August (8/24)	1,338.73	16.50
				LLC 000073Y68E354	August (8/31)	2,253.60	27.78
				LLC 000073Y68E364	September (9/07)	2,138.27	26.36
				LLC 000073Y68E374	September (9/14)	1,976.30	24.36
			280 SPED	LLC 0000V9159W344	August (8/24)	646.83	12.33
				LLC 0000V9159W354	August (8/31)	857.62	16.35
				LLC 0000V9159W364	August (8/31)	623.29	11.88
				LLC 0000V9159W374	September (9/07)	584.04	11.14
					September (9/14)	10,418.68	146.71
	Shipping Total					10,418.68	146.71
<b>UPS Total</b>						<b>167.38</b>	<b>2.06</b>
Waste Management	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 6961250-0283-7	September	253.00	3.12
	Operations and Housekeeping Services Total			LLC 6961266-0283-3	September	420.38	5.18
						420.38	5.18
<b>Waste Management Total</b>						<b>1,278.82</b>	<b>15.76</b>
Barrington Staffing Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 43941	August (8/18)	2,967.51	36.58
				LLC 43960	August (8/25)	3,231.92	39.84
				LLC 43981	September (9/01)	2,327.16	28.69
				LLC 44004	September (9/08)	756.38	14.42
			280 SPED	LLC 43941	August (8/18)	1,265.98	24.14
				LLC 43989	September (9/01)	1,025.60	19.56
				LLC 44004	September (9/08)	12,853.37	178.99
	Outside Service Total					12,853.37	178.99
<b>Barrington Staffing Services Total</b>						<b>7,500.00</b>	<b>92.45</b>
FusionPlus Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-1014	September	7,500.00	92.45
	Outside Service-General Total					7,500.00	92.45
<b>FusionPlus Inc Total</b>						<b>2,755.00</b>	<b>0.00</b>
Law Offices of Young, Minney & Corr, LLP	Legal Fees	51807 Professional Svcs & Outside Labor : Legal	101 General	LLC 11936	September (9/06)	2,942.50	973.37
				LLC 12087	September (9/06)	1,367.50	0.00
			280 SPED	LLC 11936	September (9/06)	7,065.00	973.37
	Legal Fees Total					7,065.00	973.37
<b>Law Offices of Young, Minney &amp; Corr, LLP Total</b>						<b>1,925.00</b>	<b>0.00</b>
Document Tracking Services	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	410 SUPP - Transcripts 320 Supp-ELD Services	LLC FT9306535	August	16,072.59	0.00
	Outside Service-General Total			LLC T-930650076	August	17,997.59	0.00
<b>Document Tracking Services Total</b>						<b>17,997.59</b>	<b>0.00</b>
Verizon Wireless	Telephone - Administration	56504 Program Fees & Other Instructional : Admin - Telephone	101 General	LLC 9973003637	August	1,712.67	21.11
	Telephone - Administration Total					1,712.67	21.11
<b>Verizon Wireless Total</b>						<b>2,898.00</b>	<b>40.63</b>
Certified Languages International	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	320 Supp-ELD Services	LLC 74586083124	August (8/31)	2,898.00	40.63
	Outside Service-General Total					2,898.00	40.63
<b>Certified Languages International Total</b>						<b>2,041.72</b>	<b>25.17</b>
Comm-Core	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 1091790	September	2,041.72	25.17
	Communications Total					2,041.72	25.17
<b>Comm-Core Total</b>						<b>3,290.00</b>	<b>40.56</b>
Supreme Facility Services, Inc.	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 4086	September	3,290.00	40.56
	Operations and Housekeeping Services Total					3,290.00	40.56
<b>Supreme Facility Services, Inc. Total</b>						<b>309.71</b>	<b>3.82</b>
Amazon	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	111-5792404-6013058	August	23.37	0.29
				111-7607258-3828246	August	86.02	1.06
				111-8068477-2307417	August	69.61	0.86
				111-6219620-2117030	August	19.28	0.24
				111-4525302-1982631	August	27.85	0.34
				111-7496625-4557831	August	71.29	0.88
				111-1377552-3496266	August	25.72	0.32
				111-7342983-4425038	August	16.29	0.20
				111-4122506-8319414	August	84.98	1.05
				111-7206419-8240246	September	11.03	0.14
				111-5858623-3337817	September	44.85	0.55
				111-5122939-0521845	September	44.63	0.55
				111-2522348-7283454	September	62.12	0.77
				111-4881125-3402623	September	343.16	4.23
				111-4099992-2625039	September	58.38	0.72
				111-8346159-5025007	September	207.27	2.56
				111-6482284-5148212	September	21.44	0.26
				111-5797405-7325059	September	536.83	6.62
				111-2213587-5226614	September	32.69	0.40
				111-9014714-1501822	September	16.90	0.21
				111-5235603-8627447	September	350.74	4.32
				111-9996339-5438647	September	52.14	0.64
				111-0422777-4613059	September	33.86	0.42
				112-3970578-9955444	September	128.64	1.59
				112-8038656-8742644	September	712.46	8.78
				112-7310834-2845858	September	87.50	1.08
				112-0172660-8663422	September	686.32	8.46
				112-3288450-3346612	September	297.05	3.66
				112-6322199-5946603	September	178.23	2.20
				112-7449466-3791452	September	4,640.36	57.20
	Office Expense Total					4,640.36	57.20
<b>Amazon Total</b>						<b>1,051.91</b>	<b>12.97</b>
Quill Corporation	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 40444157	September (9/06)	1,051.91	12.97
	Office Expense Total					1,051.91	12.97
<b>Quill Corporation Total</b>						<b>772.22</b>	<b>9.52</b>
AT&T Mobility	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 80557846671578 082824	September	1,756.68	21.65
	Communications Total			LLC 3291974901	September (9/10)	2,528.90	31.17
<b>AT&amp;T Mobility Total</b>						<b>2,528.90</b>	<b>31.17</b>



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	F-SJ
The Back Room Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-3149	August	3,440.00	42.40
	Outside Service-General Total					3,440.00	42.40
<b>The Back Room Inc Total</b>						<b>3,440.00</b>	<b>42.40</b>
AppleOne Employment Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 01-6935149	August (8/17)	2,881.20	35.52
				LLC 01-6939137	August (8/24)	2,881.20	35.52
				LLC 01-6944661	August (8/31)	2,296.17	28.30
				LLC 01-6949380	September (9/07)	10,922.18	134.64
	Outside Service Total					10,922.18	134.64
<b>AppleOne Employment Services Total</b>						<b>10,922.18</b>	<b>134.64</b>
Doctors Wellness Company LLC dba WellnessMart MD	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-4873	August	620.00	7.64
	Outside Service-General Total					620.00	7.64
<b>Doctors Wellness Company LLC dba WellnessMart MD Total</b>						<b>620.00</b>	<b>7.64</b>
Bill.com	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	24098454062	September	1,410.00	112.61
	Dues and Memberships Total					1,410.00	112.61
<b>Bill.com Total</b>						<b>1,410.00</b>	<b>112.61</b>
Southern California Edison	Utilities	53302 Rent and Utilities : Utilities, CAM, and Real Estate	101 General	LLC 700203189681 091124	August	2,739.66	33.77
	Utilities Total					2,739.66	33.77
<b>Southern California Edison Total</b>						<b>2,739.66</b>	<b>33.77</b>
Solution Tree	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	630 Title III	LLC 5307227	August (8/26)	5,600.00	0.00
	Teacher Training Total					5,600.00	0.00
<b>Solution Tree Total</b>						<b>5,600.00</b>	<b>0.00</b>
De Lage Landen Financial Services Inc.	Equipment Rental Expense	55304 Facilities & Equipment Rental Expense : Equipment Rental	101 General	LLC 83010406 LLC 83052785	September September (9/16)	2,588.36 554.50	31.91 6.84
	Equipment Rental Expense Total					3,142.86	38.74
<b>De Lage Landen Financial Services Inc. Total</b>						<b>3,142.86</b>	<b>38.74</b>
DataBasics, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 0813713	September	4,778.95	58.91
	Outside Service-General Total					4,778.95	58.91
<b>DataBasics, Inc. Total</b>						<b>4,778.95</b>	<b>58.91</b>
Pitney Bowes Bank Inc Purchase Power	Postage	54301 Postage & Delivery Expense : Postage	101 General	LLC 8000-9090-1005-2145 091624	September	9,129.75	112.54
	Postage Total					9,129.75	112.54
<b>Pitney Bowes Bank Inc Purchase Power Total</b>						<b>9,129.75</b>	<b>112.54</b>
Sparkletts	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 15182654 090124	September (9/01)	305.27	3.76
	Office Expense Total					305.27	3.76
<b>Sparkletts Total</b>						<b>305.27</b>	<b>3.76</b>
Smile From The Inside, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 2206	September (9/01)	15,000.00	184.91
	Outside Service-General Total					15,000.00	184.91
<b>Smile From The Inside, Inc. Total</b>						<b>15,000.00</b>	<b>184.91</b>
Western Exterminator Company	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 67422552	September (9/04)	249.60	3.08
	Operations and Housekeeping Services Total					249.60	3.08
<b>Western Exterminator Company Total</b>						<b>249.60</b>	<b>3.08</b>
Robert Half Inc.	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 63959179 LLC 63985201 LLC 64005105 LLC 64005208 LLC 64015188 LLC 64021034 LLC 64021037 LLC 64059052 LLC 64059054 LLC 64053213 LLC 64087082	August (8/09) August (8/16) August (8/23) August (8/23) August (8/23) August (8/30) August (8/30) September (9/06) September (9/06) September (9/06) September (9/13)	1,395.64 1,519.30 1,278.40 319.60 1,598.00 1,598.00 1,278.20 1,278.40 1,102.01 1,600.40	17.20 18.73 15.76 3.94 19.70 19.70 15.76 15.76 13.58 19.73
	Outside Service Total					13,503.91	166.46
<b>Robert Half Inc. Total</b>						<b>13,503.91</b>	<b>166.46</b>
Reading Horizons	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC INV71195	September (9/03)	14,190.00	270.56
	Non K12 Curriculum Total					14,190.00	270.56
<b>Reading Horizons Total</b>						<b>14,190.00</b>	<b>270.56</b>
Crisis Prevention Institute	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC WO17587942 LLC NAIN-108421	August (8/28) September (9/04)	1,661.84 3,323.68	31.69 63.37
	Non K12 Curriculum Total					200.00	2.47
	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	101 General	LLC NAIN-102927 LLC NAIN-104510	August (8/12) August (8/17)	200.00 400.00	2.47 4.93
	Teacher Training Total					3,723.68	68.30
<b>Crisis Prevention Institute Total</b>						<b>3,150.00</b>	<b>60.06</b>
Effectual Educational Consulting Service	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC 12616	July (7/31)	3,150.00	60.06
	Subagreements for Services Total					3,150.00	60.06
<b>Effectual Educational Consulting Service Total</b>						<b>3,150.00</b>	<b>60.06</b>
NASSP	Prepaid Other	13514 Prepaid Other	330 SUPP - Engagement	LLC 9001779728 LLC 9001779729	January (1/14) January (1/14)	385.00 770.00	0.00 0.00
	Prepaid Other Total					770.00	0.00
<b>NASSP Total</b>						<b>770.00</b>	<b>0.00</b>
Everon, LLC	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 156097249 LLC 156309956	August (8/16) September (9/04)	450.38 525.38	5.55 6.48
	Operations and Housekeeping Services Total					525.38	6.48
<b>Everon, LLC Total</b>						<b>525.38</b>	<b>6.48</b>
Augmentative Communications Solutions	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC INV-0718	August (8/19)	1,550.00	6.32
	Subagreements for Services Total					1,550.00	6.32
<b>Augmentative Communications Solutions Total</b>						<b>1,550.00</b>	<b>6.32</b>
AXIS Teletherapy	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC 3000	July (7/31)	455.00	8.68
	Subagreements for Services Total					455.00	8.68
<b>AXIS Teletherapy Total</b>						<b>455.00</b>	<b>8.68</b>





Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	I-SI
DW Educational Research, Inc	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	101 General	LLC 2151	August (8/29)	11,000.00	0.00
	<b>Non K12 Curriculum Total</b>					<b>11,000.00</b>	<b>0.00</b>
<b>DW Educational Research, Inc Total</b>						<b>11,000.00</b>	<b>0.00</b>
Golf N' Stuff Group Sales	School Event	56328 Program Fees & Other Instructional : Program Fees - School Events Expense	330 SUPP - Engagement	LLC 2178	July (7/11)	1,050.00	0.00
	<b>School Event Total</b>					<b>1,050.00</b>	<b>0.00</b>
<b>Golf N' Stuff Group Sales Total</b>						<b>1,050.00</b>	<b>0.00</b>
Integration Inc.	Postage	54301 Postage & Delivery Expense : Postage	101 General	LLC 2408153	August (8/31)	5,036.27	62.08
	<b>Postage Total</b>					<b>5,036.27</b>	<b>62.08</b>
	Printing Expense	52801 Office Supplies Expense : Business Expense/Printing & Reproduction	101 General	LLC 2408153	August (8/31)	3,364.55	41.47
	<b>Printing Expense Total</b>					<b>3,364.55</b>	<b>41.47</b>
<b>Integration Inc. Total</b>						<b>8,400.82</b>	<b>103.56</b>
Pitney Bowes Global Financial Services	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 1025958647 LLC 3106814827	August (8/28) August (8/30)	162.99	2.01
	<b>Office Expense Total</b>					<b>601.53</b>	<b>7.42</b>
<b>Pitney Bowes Global Financial Services Total</b>						<b>764.52</b>	<b>9.42</b>
City Printing Graphics	Printing Expense	52801 Office Supplies Expense : Business Expense/Printing & Reproduction	101 General	LLC 24-31787 LLC 24-31788 LLC 24-31789	September (9/09) September (9/09) September (9/09)	6,467.18 568.43 7,046.34	0.00 0.00 3.55
	<b>Printing Expense Total</b>					<b>7,046.34</b>	<b>3.55</b>
<b>City Printing Graphics Total</b>						<b>7,046.34</b>	<b>3.55</b>
Green Hasson & Janks LLP	Accounting Fees	56321 Program Fees & Other Instructional : Program Fees - Accounting	101 General	LLC 94660	August (8/24)	718.00	0.00
	<b>Accounting Fees Total</b>					<b>718.00</b>	<b>0.00</b>
<b>Green Hasson &amp; Janks LLP Total</b>						<b>718.00</b>	<b>0.00</b>
Los Angeles Marriott Burbank Airport Hotel	Travel and Conferences	66001 SG&A - Conferences and Events Expense : Events-Information Sessions	730 CSI- Comprehensive Support and Improvement	LLC 62024	June (6/20)	10,000.00	0.00
	<b>Travel and Conferences Total</b>					<b>10,000.00</b>	<b>0.00</b>
<b>Los Angeles Marriott Burbank Airport Hotel Total</b>						<b>10,000.00</b>	<b>0.00</b>
Speech Guy, LLC	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	280 SPED	LLC TCUSD2407	September (9/02)	5,600.00	106.78
	<b>Teacher Training Total</b>					<b>5,600.00</b>	<b>106.78</b>
<b>Speech Guy, LLC Total</b>						<b>5,600.00</b>	<b>106.78</b>
ULINE	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 182858061	September (9/09)	715.19	8.82
	<b>Office Expense Total</b>					<b>715.19</b>	<b>8.82</b>
<b>ULINE Total</b>						<b>715.19</b>	<b>8.82</b>
Vogue Sign Company	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 2408064	August (8/31)	2,347.00	28.93
	<b>Office Expense Total</b>					<b>2,347.00</b>	<b>28.93</b>
<b>Vogue Sign Company Total</b>						<b>2,347.00</b>	<b>28.93</b>
American School Counselor Association	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	730 CSI- Comprehensive Support and Improvement	LLC 5368021	April (4/06)	13,837.50	0.00
	<b>Teacher Training Total</b>					<b>13,837.50</b>	<b>0.00</b>
<b>American School Counselor Association Total</b>						<b>13,837.50</b>	<b>0.00</b>
The Silly Room	Subagreements for Services	51817 Professional Svcs & Outside Labor : Special Education Professional Services	280 SPED	LLC MK_176	September (9/02)	1,050.40	20.03
	<b>Subagreements for Services Total</b>					<b>1,050.40</b>	<b>20.03</b>
<b>The Silly Room Total</b>						<b>1,050.40</b>	<b>20.03</b>
Zoom Video Communications, Inc.	Prepaid Other	13514 Prepaid Other	480 SUPP - Student Training	LLC INV273470184	September (9/18)	40,475.00	567.47
	<b>Prepaid Other Total</b>					<b>40,475.00</b>	<b>567.47</b>
<b>Zoom Video Communications, Inc. Total</b>						<b>40,475.00</b>	<b>567.47</b>
Little Caesars	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	978	September	196.54	2.42
	<b>Office Expense Total</b>					<b>196.54</b>	<b>2.42</b>
<b>Little Caesars Total</b>						<b>196.54</b>	<b>2.42</b>
<b>Grand Total</b>						<b>273,642.13</b>	<b>3,806.42</b>





**Insight School at San Joaquin  
Board Disbursements A/P Payment History  
October 01, 2024 - October 31, 2024**

Vendor	Description	Total
California Virtual Academy@ISCA	Intercompany Settlement	348,219.00
Insight @ San Diego	Intercompany Settlement	91,990.00
Insperity	PEO - Payroll Services and HR Admin Services provider	45,535.22
New Jerusalem Elementary School Distric	Q3 Oversight/Indirect fees (Jan - Mar)	38,301.00
California Virtual Academy @ LA	Intercompany Settlement	34,843.00
California Virtual Academy @ Maricopa	Intercompany Settlement	30,239.00
Northern California Preparatory School	Special Education Contracted Services	28,302.00
SAN JOAQUIN COUNTY OF EDUCATION	STRS EE/ER Contribution	12,922.15
Green Hasson & Janks LLP	Audit Fees & Porfessional Services	8,988.00
School Pathways LLC	Annual Subscription	7,260.74
Effectual Educational Consulting Service	Special Education Services	3,216.57
State Board of Equalization	Sales Tax	2,247.00
E-Therapy Intermediate, INC	Special Education Contracted Services	2,070.64
Christy Bock dba Cornerstone Educational Solutions	Special Education Contracted Services	1,800.00
National TeleTherapy Resources, a Speech Pathology Corp.	Special Education Contracted Services	1,538.67
Communicology, Inc., DBA, TeleSesh	Special Education Contracted Services	1,284.39
El Paseo Children's Center, Inc.	Special Education Contracted Services	918.93
AXIS Teletherapy	Special Education Contracted Services - Speech Report Reviews	888.75
PrentGraf Ltd dba TalkPath Live	Special Education Contracted Services	888.50
Rids Brother Company Inc	Transportation Services	850.00
Anchor Counseling & Education Solutions	Special Education Contracted Services	839.77
Chase Boyle dba Snow Counseling	Special Education Contracted Services	750.00
Sally Gonzalez	Special Education Professional Services	600.00
California Teachers Association	Union Dues	496.00
TheraStaffers	Special Education Contracted Services - Speech and Language Therapy	496.00
Speech Guy, LLC	Special Education Contracted Services	488.74
Point Quest Pediatric Therapies, LLC	Special Education Contracted Services	483.77
TinyEYE Technology Corporation	Special Education Contracted Services	392.00
eLuma	Special Individual Counseling Services	340.00
PresenceLearning, Inc.	Special Education Contracted Services - Speech and Language Therapy	231.88
Oxford Consulting Services	Special Education Contracted Services	150.00
Specialized Therapy Services Inc	Special Education Contracted Services	125.00
Kadiant, LLC	Special Education Contracted Services	65.00
<b>Grand Total</b>		<b>667,761.72</b>



**K12 : SA : Full Financials CA Node : CAVAISSJ**  
**Board Disbursements A/P Payment History by Vendor**  
**October 01, 2024 - October 31, 2024**

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #2001 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	10/29/2024	INV-07239		(53.34)
	Bill	10/29/2024	INV-07213		(475.18)
	Bill Payment	10/29/2024	2001		528.52
Bill Payment #1972 - Anchor Counseling & Education Solutions(Insight@San Joaquin)	Bill	10/10/2024	INV-07163		(311.25)
	Bill Payment	10/11/2024	1972		311.25
					0.00
Bill Payment #ACH 10.10.24 & 10.25.24 - Insperty(Insight@San Joaquin)	Bill	10/28/2024	iSJ_OCT'24 PYRL	iSJ_OCT 2024 Var. PYRL Invs	(45,535.22)
	Bill Payment	10/29/2024	ACH 10.10.24 & 10.25.24	iSJ_OCT 2024 Var. PYRL Invs	45,535.22
					0.00
Bill Payment #ACH 10.30.2024 - State Board of Equalization(Insight@San Joaquin)	Bill	09/27/2024	iSJ_SEP'24_Use Tax	iSJ_Matrls/Comptr Use Tax_SEP 2024	(2,247.00)
	Bill Payment	10/30/2024	ACH 10.30.2024	iSJ_Matrls/Comptr Use Tax_SEP 2024 & Adj	2,247.00
Bill Credit #iSJ_SEP'24_Use Tax Qtr. End Adj. - State Board of Equalization(Insight@San Joaquin)	Bill	09/27/2024	iSJ_SEP'24_Use Tax	iSJ_Matrls/Comptr Use Tax_SEP 2024	(12.98)
	Bill Credit	10/30/2024	iSJ_SEP'24_Use Tax Qtr. End Adj.	iSJ_Matrls/Comptr Use Tax_SEP 2024 Qtr. End Adj.	12.98
					0.00
Bill Payment #1973 - Axis Teletherapy(Insight @ San Joaquin)	Bill	10/10/2024	INV-00938		(888.75)
	Bill Payment	10/11/2024	1973		888.75
					0.00
Bill Payment #2012 - SAN JOAQUIN COUNTY OF EDUCATION	Bill	10/29/2024	iSJ_OCT 2024 STRS EE/ER Contrib	iSJ_OCT 2024 STRS EE/ER Contrib	(12,922.15)
	Bill Payment	10/29/2024	2012	iSJ_OCT 2024 STRS EE/ER Contrib	12,922.15
					0.00
Bill Payment #1994 - Point Quest Pediatric Therapies, LLC(Insight @ San Joaquin)	Bill	10/17/2024	INV-00205		(483.77)
	Bill Payment	10/17/2024	1994		483.77
					0.00
Bill Payment #2004 - Green Hasson & Janks LLP(Insight@San Joaquin)	Bill	10/29/2024	96416		(5,768.00)
	Bill Payment	10/29/2024	2004		5,768.00
Bill Payment #1965 - Green Hasson & Janks LLP(Insight@San Joaquin)	Bill	10/04/2024	68309 - 10% Withheld		(3,220.00)
	Bill Payment	10/07/2024	1965		3,220.00
					0.00
Bill Payment #1991 - Effectual Educational Consulting Service(Insight@San Joaquin)	Bill	10/17/2024	INV-08910		(1,170.00)
	Bill	10/17/2024	INV-08905		(398.75)
	Bill	10/17/2024	INV-08881		(60.00)
	Bill Payment	10/17/2024	1991		1,628.75
Bill Payment #1977 - Effectual Educational Consulting Service(Insight@San Joaquin)	Bill	10/10/2024	INV-08824		(100.00)
	Bill	10/10/2024	INV-08844		(450.00)
	Bill	10/10/2024	INV-08840		(256.00)
	Bill	10/10/2024	INV-08846		(120.00)
	Bill Payment	10/11/2024	1977		926.00
Bill Payment #1963 - Effectual Educational Consulting Service(Insight@San Joaquin)	Bill	10/04/2024	INV-08650		(275.00)
	Bill	10/04/2024	INV-08654		(244.67)
	Bill	10/04/2024	INV-08673		(52.15)
	Bill	10/04/2024	INV-08680		(90.00)
	Bill Payment	10/07/2024	1963		661.82
					0.00
Bill Payment #1961 - California Teachers Association(Insight@San Joaquin)	Bill	10/04/2024	Union Dues - 092024		(496.00)
	Bill Payment	10/07/2024	1961		496.00
					0.00
Bill Payment #2005 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	10/29/2024	INV-07547		(318.59)
	Bill Payment	10/29/2024	2005		318.59
Bill Payment #1992 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	10/17/2024	INV-07468		(56.50)
	Bill	10/17/2024	INV-07469		(215.46)
	Bill Payment	10/17/2024	1992		271.96
Bill Payment #1980 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill	10/10/2024	INV-07237		(216.58)
	Bill	10/10/2024	INV-07273		(414.33)
	Bill	10/10/2024	INV-07274		(133.00)
	Bill	10/10/2024	INV-07424		(117.71)



K12 : SA : Full Financials CA Node : CAVAISSJ  
Board Disbursements A/P Payment History by Vendor  
October 01, 2024 - October 31, 2024

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1980 - National TeleTherapy Resources, a	Bill Payment	10/11/2024	1980		881.62 (66.50)
Bill Payment #1966 - National TeleTherapy Resources, a Speech Pathology Corp.(Insight @ San Joaquin)	Bill Bill Payment	10/04/2024 10/07/2024	INV-07239 1966		66.50 0.00
Bill Payment #2002 - Chase Boyle dba Snow Counseling(Insight @ San Joaquin)	Bill Bill Payment	10/29/2024 10/29/2024	INV-00438 2002		(210.00) 210.00
Bill Payment #1988 - Chase Boyle dba Snow Counseling(Insight @ San Joaquin)	Bill Bill Payment	10/17/2024 10/17/2024	INV-00406 1988		(540.00) 540.00
Bill Payment #2003 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill Bill Bill Bill Payment	10/29/2024 10/29/2024 10/29/2024 10/29/2024	INV-00207 INV-00193 INV-00173 2003		(162.50) (28.75) (262.50) 453.75
Bill Payment #1989 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill Bill Payment	10/17/2024 10/17/2024	INV-00159 1989		(137.50) 137.50
Bill Payment #1975 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-00127 1975		(455.64) 455.64
Bill Payment #1962 - Communicology, Inc., DBA, TeleSesh(Insight @ San Joaquin)	Bill Bill Payment	10/04/2024 10/07/2024	INV-00108 1962		(237.50) 237.50
Bill Payment #1978 - eLuma(Insight@San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	VST-01099 1978		0.00 (340.00) 340.00
Bill Payment #1982 - PrentGraf Ltd dba TalkPath Live(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-00914 1982		(888.50) 888.50
Bill Payment #2010 - Speech Guy, LLC(Insight @ San Joaquin)	Bill Bill Payment	10/29/2024 10/29/2024	INV-01156 2010		(185.08) 185.08
Bill Payment #1996 - Speech Guy, LLC(Insight @ San Joaquin)	Bill Bill Payment	10/17/2024 10/17/2024	INV-01137 1996		(92.54) 92.54
Bill Payment #1985 - Speech Guy, LLC(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-01119 1985		(211.12) 211.12
Bill Payment #2011 - TheraStaffers(Insight @ San Joaquin)	Bill Bill Payment	10/29/2024 10/29/2024	INV-00616 2011		(248.00) 248.00
Bill Payment #1986 - TheraStaffers(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-00602 1986		(103.33) 103.33
Bill Payment #1971 - TheraStaffers(Insight @ San Joaquin)	Bill Bill Payment	10/04/2024 10/07/2024	INV-00589 1971		(144.67) 144.67
Bill Payment #1990 - E-Therapy Intermediate, INC(Insight @ San Joaquin)	Bill Bill Bill Bill Payment	10/17/2024 10/17/2024 10/17/2024 10/17/2024	INV-07944 INV-07945 INV-07959 1990		(962.20) (14.06) (820.00) 1,796.26
Bill Payment #1976 - E-Therapy Intermediate, INC(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-07907 1976		(274.38) 274.38
Bill Payment #1995 - PresenceLearning, Inc.(Insight @ San Joaquin)	Bill Bill Payment	10/17/2024 10/17/2024	INV-08917 1995		0.00 231.88
Bill Payment #2008 - Sally Gonzalez(Insight @ San Joaquin)	Bill Bill Bill Payment	10/29/2024 10/29/2024 10/29/2024	INV-00305 INV-00300 2008		(100.00) (125.00) 225.00
Bill Payment #1983 - Sally Gonzalez(Insight @ San Joaquin)	Bill Bill Payment	10/10/2024 10/11/2024	INV-00290 1983		(125.00) 125.00





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Board Disbursements A/P Payment History by Vendor  
October 01, 2024 - October 31, 2024

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
Bill Payment #1969 - Sally Gonzalez(Insight @ San Joaquin)	Bill	10/04/2024	INV-00276		(125.00)
	Bill	10/04/2024	INV-00283		(125.00)
	Bill Payment	10/07/2024	1969		250.00
					0.00
Bill Payment #1987 - TinyEYE Technology Corporation(Insight @ San Joaquin)	Bill	10/10/2024	INV-00582		(392.00)
	Bill Payment	10/11/2024	1987		392.00
					0.00
Bill Payment #1997 - California Virtual Academy @ LA(Insight@San Joaquin)	Bill	10/22/2024	iSJ_OCT'24 Interco LA	Intercompany Settlement OCT 2024	(34,843.00)
	Bill Payment	10/22/2024	1997	Intercompany Settlement OCT 2024	34,843.00
					0.00
Bill Payment #2000 - Insight @ San Diego(Insight@San Joaquin)	Bill	10/22/2024	iSJ_OCT'24 Interco_iSD	Intercompany Settlement OCT 2024	(91,990.00)
	Bill Payment	10/22/2024	2000	Intercompany Settlement OCT 2024	91,990.00
					0.00
Bill Payment #1964 - El Paseo Children's Center, Inc.(Insight @ San Joaquin)	Bill	10/04/2024	INV-01082		(918.93)
	Bill Payment	10/07/2024	1964		918.93
					0.00
Bill Payment #1967 - New Jerusalem Elementary School Distric(Insight@San Joaquin)	Bill	10/04/2024	AR25-00017		(38,301.00)
	Bill Payment	10/07/2024	1967		38,301.00
					0.00
Bill Payment #1993 - Northern California Preparatory School(Insight @ San Joaquin)	Bill	10/17/2024	NCPSS5858		(11,599.50)
	Bill	10/17/2024	NCPSS5875		(3,294.00)
	Bill Payment	10/17/2024	1993		14,893.50
					(4,702.50)
Bill Payment #1968 - Northern California Preparatory School(Insight @ San Joaquin)	Bill	10/04/2024	NCPSS5790		(108.00)
	Bill	10/04/2024	NCPSS5807		(6,897.00)
	Bill	10/04/2024	NCPSS5824		(1,701.00)
	Bill	10/04/2024	NCPSS5841		13,408.50
	Bill Payment	10/07/2024	1968		0.00
					(5,448.21)
Bill Payment #1984 - School Pathways LLC(Insight@San Joaquin)	Bill	10/10/2024	140-INV7653		
	Bill Payment	10/11/2024	1984		5,448.21
					(1,812.53)
Bill Payment #1970 - School Pathways LLC(Insight@San Joaquin)	Bill	10/04/2024	140-INV7453		
	Bill Payment	10/07/2024	1970		1,812.53
					0.00
					(1,800.00)
Bill Payment #1974 - Christy Bock dba Cornerstone Educational Solutions(Insight @ San Joaquin)	Bill	10/10/2024	INV-00485		
	Bill Payment	10/11/2024	1974		1,800.00
					0.00
					(65.00)
Bill Payment #1979 - Kadiant, LLC(Insight @ San Joaquin)	Bill	10/10/2024	INV-00155		
	Bill Payment	10/11/2024	1979		65.00
					0.00
					(25.00)
Bill Payment #2006 - Oxford Consulting Services(Insight@San Joaquin)	Bill	10/29/2024	INV-01718		
	Bill	10/29/2024	INV-01719		(25.00)
	Bill Payment	10/29/2024	2006		50.00
					(50.00)
Bill Payment #1981 - Oxford Consulting Services(Insight@San Joaquin)	Bill	10/10/2024	INV-01678		
	Bill	10/10/2024	INV-01679		(50.00)
	Bill Payment	10/11/2024	1981		100.00
					0.00
					(30,239.00)
Bill Payment #1998 - California Virtual Academy @ Maricopa(Insight@San Joaquin)	Bill	10/22/2024	iSJ_OCT'24 Interco_MA	Intercompany Settlement OCT 2024	
	Bill Payment	10/22/2024	1998	Intercompany Settlement OCT 2024	30,239.00
					0.00
					(348,219.00)
Bill Payment #1999 - California Virtual Academy@ISCA(Insight@San Joaquin)	Bill	10/22/2024	iSJ_OCT'24 Interco_ISCA	Intercompany Settlement OCT 2024	
	Bill Payment	10/22/2024	1999	Intercompany Settlement OCT 2024	348,219.00
					0.00
					(850.00)
Bill Payment #2007 - Rids Brother Company Inc(Insight @ San Joaquin)	Bill	10/29/2024	1436		
	Bill Payment	10/29/2024	2007		850.00
					0.00
					(125.00)
Bill Payment #2009 - Specialized Therapy Services Inc(Insight @ San Joaquin)	Bill	10/29/2024	INV-01265		
	Bill Payment	10/29/2024	2009		125.00
					0.00





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Board Disbursements A/P Payment History by Vendor  
October 01, 2024 - October 31, 2024

Options: Show Zeros

Transaction	Bill Type	Date	Document Number	Memo	Amount
					0.00
				Total	667,761.72



## Transaction Summary

### Insight at San Joaquin

Vendor	Amount
Law Offices of Young, Minney & Corr, LLP	2,638.12
N2Y, LLC	896.92
Rosetta Stone LLC	623.90
UPS	242.51
Barrington Staffing Services	194.64
Pitney Bowes Bank Inc Purchase Power	187.61
Smile From The Inside, Inc.	184.91
Certified Languages International	144.75
PAR Inc.	139.89
AppleOne Employment Services	132.53
Robert Half Inc.	124.95
Bill.com	112.61
FusionPlus Inc	92.45
Reading Horizons	83.90
City Printing Graphics	83.37
DataBasics, Inc.	55.59
The Back Room Inc	42.40
Supreme Facility Services, Inc.	40.56
AT&T Mobility	32.69
De Lage Landen Financial Services Inc.	31.91
Southern California Edison	29.48
Amazon	29.40
Quill Corporation	27.82
UBEO Business Services	27.01
Comm-Core	24.26
Adobe Inc.	22.74
City of Simi Valley	14.26
Everon, LLC	14.08
AXIS Teletherapy	11.28
Ontario Refrigeration	10.64
VC Furniture & Facility Services	10.42
Verizon Wireless	10.38
Dutch Ryan Plumbing	9.17
Orkin	8.81
Carmen Gomez Ruiz	7.40
Waste Management	5.18
Sparkletts	4.22
Google LLC	4.00
Successories	3.64
Western Exterminator Company	3.08
Paper Recycling & Shredding	2.66
Doctors Wellness Company LLC dba WellnessMart MD	2.29



**Transaction Summary**  
**Insight at San Joaquin**

<b>Vendor</b>	<b>Amount</b>
Amazon B2B Prime	1.64
Dropbox	1.48
Smart & Final	0.85
Zoom Video Communications, Inc.	0.01
Dropbox Cashback	(0.30)
<b>Grand Total</b>	<b>6,372.12</b>



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	I-SJ
Carmen Gomez Ruiz	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 3008	September	600.00	7.40
	<b>Operations and Housekeeping Services Total</b>					<b>600.00</b>	<b>7.40</b>
<b>Carmen Gomez Ruiz Total</b>						<b>600.00</b>	<b>7.40</b>
Paper Recycling & Shredding	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 583667	September (9/19)	108.00	1.33
				LLC 584743	October (10/03)	108.00	1.33
	<b>Office Expense Total</b>					<b>216.00</b>	<b>2.66</b>
<b>Paper Recycling &amp; Shredding Total</b>						<b>216.00</b>	<b>2.66</b>
UPS	Shipping	54302 Postage & Delivery Expense : Messenger & Delivery	101 General	LLC 000073Y68E384	September (9/21)	1,974.11	24.33
				LLC 000073Y68E394	September (9/28)	1,622.91	20.01
				LLC 000073Y68E404	October (10/05)	5,942.69	73.26
				LLC 000073Y68E414	October (10/12)	4,749.34	58.55
				LLC 000073Y68E424	October (10/19)	958.03	11.81
			280 SPED	LLC 0000V9159W384	September (9/21)	543.58	10.36
				LLC 0000V9159W394	September (9/28)	636.31	12.13
				LLC 0000V9159W404	October (10/05)	671.22	12.80
				LLC 0000V9159W414	October (10/12)	738.49	14.08
				LLC 0000V9159W424	October (10/19)	272.04	5.19
	<b>Shipping Total</b>					<b>18,108.72</b>	<b>242.51</b>
<b>UPS Total</b>						<b>18,108.72</b>	<b>242.51</b>
Waste Management	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 6996633-0283-3	October	167.38	2.06
				LLC 6996649-0283-9	October	253.00	3.12
	<b>Operations and Housekeeping Services Total</b>					<b>420.38</b>	<b>5.18</b>
<b>Waste Management Total</b>						<b>420.38</b>	<b>5.18</b>
Barrington Staffing Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 44025	September (9/15)	1,859.96	22.93
				LLC 44047	September (9/22)	1,769.71	21.82
				LLC 44068	September (9/29)	1,865.45	23.00
				LLC 44087	October (10/06)	1,201.33	14.81
				LLC 44110	October (10/13)	1,851.17	22.82
				LLC 44143	October (10/20)	1,293.06	15.94
			280 SPED	LLC 44025	September (9/15)	1,282.00	24.44
				LLC 44047	September (9/22)	1,282.32	24.45
				LLC 44068	September (9/29)	1,282.00	24.44
	<b>Outside Service Total</b>					<b>13,687.00</b>	<b>194.64</b>
<b>Barrington Staffing Services Total</b>						<b>13,687.00</b>	<b>194.64</b>
FusionPlus Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-1015	October	7,500.00	92.45
	<b>Outside Service-General Total</b>					<b>7,500.00</b>	<b>92.45</b>
<b>FusionPlus Inc Total</b>						<b>7,500.00</b>	<b>92.45</b>
Law Offices of Young, Minney & Corr, LLP	Legal Fees	51807 Professional Svcs & Outside Labor : Legal	101 General	LLC 12564	October (10/03)	7,975.00	2,638.12
	<b>Legal Fees Total</b>					<b>7,975.00</b>	<b>2,638.12</b>
<b>Law Offices of Young, Minney &amp; Corr, LLP Total</b>						<b>7,975.00</b>	<b>2,638.12</b>
Document Tracking Services	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	410 SUPP - Transcripts 320 Supp - ELD Services	LLC FT9306536	September	15,898.58	0.00
				LLC T-930650077	September	17,473.58	0.00
	<b>Outside Service-General Total</b>					<b>17,473.58</b>	<b>0.00</b>
<b>Document Tracking Services Total</b>						<b>17,473.58</b>	<b>0.00</b>
Verizon Wireless	Telephone - Administration	56504 Program Fees & Other Instructional : Admin - Telephone	101 General	LLC 9975422324	September	842.19	10.38
	<b>Telephone - Administration Total</b>					<b>842.19</b>	<b>10.38</b>
<b>Verizon Wireless Total</b>						<b>842.19</b>	<b>10.38</b>
Certified Languages International	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	320 Supp - ELD Services	LLC 74586093024	September (9/30)	3,128.25	144.75
	<b>Outside Service-General Total</b>					<b>3,128.25</b>	<b>144.75</b>
<b>Certified Languages International Total</b>						<b>3,128.25</b>	<b>144.75</b>
Comm-Core	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 1093395	October	1,968.22	24.26
	<b>Communications Total</b>					<b>1,968.22</b>	<b>24.26</b>
<b>Comm-Core Total</b>						<b>1,968.22</b>	<b>24.26</b>
Supreme Facility Services, Inc.	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 4122	October	3,290.00	40.56
	<b>Operations and Housekeeping Services Total</b>					<b>3,290.00</b>	<b>40.56</b>
<b>Supreme Facility Services, Inc. Total</b>						<b>3,290.00</b>	<b>40.56</b>
Amazon	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	111-6621083-7878626	October	62.21	0.77
				111-7322771-1246606	October	0.00	0.00
				111-7091949-1288269	October	41.39	0.51
				111-3616025-6854602	October	29.43	0.36
				111-9189400-1253813	October	623.96	7.69
				111-5827520-4281814	October	29.43	0.36
				113-6688151-4847449	October	17.15	0.21
				113-1396308-8969064	October	192.78	2.38
				113-8164025-1772228	October	543.72	6.70
				113-0612071-5876200	October	55.41	0.68
				113-0289147-0364207	October	40.74	0.50
				111-2181114-0882642	October	428.95	5.29
				113-8727555-1738648	October	96.04	1.18
				113-5841378-9217810	October	126.72	1.56
				113-4707895-7685065	October	85.97	1.06
				112-3805023-6525815	October	10.71	0.13
	<b>Office Expense Total</b>					<b>2,384.61</b>	<b>29.40</b>
<b>Amazon Total</b>						<b>2,384.61</b>	<b>29.40</b>
Quill Corporation	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 40650719	September (9/18)	161.95	2.00
				LLC 40205043	August (8/22)	242.92	2.99
				LLC 40253534	August (8/26)	444.98	5.49
				LLC 40866346	October (10/01)	1,285.37	15.84
				LLC 40866625	October (10/01)	121.27	1.49
	<b>Office Expense Total</b>					<b>2,256.49</b>	<b>27.82</b>
<b>Quill Corporation Total</b>						<b>2,256.49</b>	<b>27.82</b>
AT&T Mobility	Communications	53801 Phone & Internet Expense : Telephone	101 General	LLC 80557846671578 092824	October	894.96	11.03
				LLC 5468345907	October	1,756.68	21.65
	<b>Communications Total</b>					<b>2,651.64</b>	<b>32.69</b>
<b>AT&amp;T Mobility Total</b>						<b>2,651.64</b>	<b>32.69</b>
The Back Room Inc	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-3219	September	3,440.00	42.40
	<b>Outside Service-General Total</b>					<b>3,440.00</b>	<b>42.40</b>
<b>The Back Room Inc Total</b>						<b>3,440.00</b>	<b>42.40</b>
AppleOne Employment Services	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 01-6953086	September (9/18)	2,881.20	35.52
				LLC 01-6958175	September (9/25)	3,154.25	38.88
				LLC 01-6962323	October (10/02)	1,768.32	21.80
				LLC 01-6966078	October (10/09)	1,473.60	18.17





Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	i-SJ
AppleOne Employment Services	Outside Service	51806 Professional Svcs & Outside	101 General	LLC 01-6971221	October (10/12)	1,473.60	18.17
	Outside Service Total					10,750.97	132.53
AppleOne Employment Services Total						10,750.97	132.53
Doctors Wellness Company LLC dba WellnessMart MD	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC INV-5509	September	186.00	2.29
	Outside Service-General Total					186.00	2.29
Doctors Wellness Company LLC dba WellnessMart MD Total						186.00	2.29
Bill.com	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	24108803716	October	1,410.00	112.61
	Dues and Memberships Total					1,410.00	112.61
Bill.com Total						2,391.38	29.48
Southern California Edison	Utilities	53302 Rent and Utilities : Utilities, CAM, and Real Estate	101 General	LLC 700203189681 101024	September	2,391.38	29.48
	Utilities Total					2,391.38	29.48
Southern California Edison Total						1,440.00	0.00
Solution Tree	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	160 EDUEFF	LLC 5309105 LLC 5309737	September (9/19) September (9/27)	1,920.00 3,360.00	0.00 0.00
	Teacher Training Total					3,360.00	0.00
Solution Tree Total						2,588.36	31.91
De Lage Landen Financial Services Inc.	Equipment Rental Expense	55304 Facilities & Equipment Rental Expense : Equipment Rental	101 General	LLC 83143050	October	2,588.36	31.91
	Equipment Rental Expense Total					2,588.36	31.91
De Lage Landen Financial Services Inc. Total						4,509.45	55.59
DataBasics, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 0813842	October	4,509.45	55.59
	Outside Service-General Total					4,509.45	55.59
DataBasics, Inc. Total						15,219.75	187.61
Pitney Bowes Bank Inc Purchase Power	Postage	54301 Postage & Delivery Expense : Postage	101 General	LLC 8000-9090-1005-2145 101624	October	15,219.75	187.61
	Postage Total					15,219.75	187.61
Pitney Bowes Bank Inc Purchase Power Total						342.74	4.22
Sparkletts	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	LLC 15182654 092924	September (9/29)	342.74	4.22
	Office Expense Total					342.74	4.22
Sparkletts Total						15,000.00	184.91
Smile From The Inside, Inc.	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 2207	October	15,000.00	184.91
	Outside Service-General Total					15,000.00	184.91
Smile From The Inside, Inc. Total						249.60	3.08
Western Exterminator Company	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 68628566	October (10/02)	249.60	3.08
	Operations and Housekeeping Services Total					249.60	3.08
Western Exterminator Company Total						1,522.69	18.77
Robert Half Inc.	Outside Service	51806 Professional Svcs & Outside Labor : Outside Labor/Temporary Help	101 General	LLC 64100784 LLC 64106884 LLC 64127734 LLC 64131338 LLC 64167463 LLC 64182148 LLC 64208764	September (9/20) September (9/20) September (9/27) September (9/27) October (10/04) October (10/11) October (10/18)	810.00 1,601.20 1,800.00 1,600.40 1,598.80 1,203.30	9.98 19.74 22.19 19.73 19.71 14.83
	Outside Service Total					10,136.39	124.95
Robert Half Inc. Total						4,400.00	83.90
Reading Horizons	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC INV71759	October (10/21)	4,400.00	83.90
	Non K12 Curriculum Total					4,400.00	83.90
Reading Horizons Total						419.61	5.17
Everon, LLC	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 156369400 LLC 156557369 LLC 156698865	October September (9/26) October (10/08)	303.35 419.61	3.74 5.17
	Operations and Housekeeping Services Total					1,142.57	14.08
Everon, LLC Total						520.00	11.28
AXIS Teletherapy	Teacher Training	56313 Program Fees & Other Instructional : Program Fees - Professional Development	160 EDUEFF	LLC 100	October (10/07)	520.00	11.28
	Teacher Training Total					520.00	11.28
AXIS Teletherapy Total						252.04	83.37
City Printing Graphics	Printing Expense	52801 Office Supplies Expense : Business Expense/Printing & Reproduction	101 General	LLC 24-31845 LLC 24-31846	October (10/01) October (10/01)	600.60	0.00
	Printing Expense Total					852.64	83.37
City Printing Graphics Total						1,030.00	0.00
Green Hasson & Janks LLP	Accounting Fees	56321 Program Fees & Other Instructional : Program Fees - Accounting	101 General	LLC 96095	September (9/28)	1,030.00	0.00
	Accounting Fees Total					1,030.00	0.00
Green Hasson & Janks LLP Total						1.00	0.01
Zoom Video Communications, Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	480 SUPP - Student Training	LLC INV277508569	October (10/18)	1.00	0.01
	Non K12 Curriculum Total					1.00	0.01
Zoom Video Communications, Inc. Total						9,538.37	0.00
Kajeet Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	560 Title I	LLC INV35540	September (9/14)	9,538.37	0.00
	Non K12 Curriculum Total					9,538.37	0.00
Kajeet Inc. Total						14,578.87	0.00
NZY, LLC	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC INV-1087269	September (9/27)	14,578.87	0.00
	Non K12 Curriculum Total					974.24	366.16
	Materials and Supplies	56334 Program Fees & Other Instructional : Program Fees - Non K12 Teacher Materials	280 SPED	LLC INV-1087331 LLC INV-1087332 LLC INV-1087333 LLC INV-1087334 LLC INV-1087335 LLC INV-1087336 LLC INV-1087337 LLC INV-1087338 LLC INV-1087349	September (9/30) September (9/30) September (9/30) September (9/30) September (9/30) September (9/30) September (9/30) September (9/30) September (9/30)	974.24 975.36 978.74 978.74 978.74 985.49 965.24 969.74 1,412.21	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 530.76
	Materials and Supplies Total					9,214.00	896.92
NZY, LLC Total						23,792.87	896.92



Transaction Details  
Insight San Joaquin

Employee/Vendor	Description for Coding Purposes	GL Account (Added)	Class	Invoice Number	Time Period	Total Invoice Amount	i-SJ
Adobe Inc.	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	LLC 2890123683	October (10/01)	1,845.00	22.74
	Dues and Memberships Total					1,845.00	22.74
<b>Adobe Inc. Total</b>						<b>1,845.00</b>	<b>22.74</b>
Ontario Refrigeration	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC GW32820M	October (10/01)	863.00	10.64
	Operations and Housekeeping Services Total					863.00	10.64
<b>Ontario Refrigeration Total</b>						<b>863.00</b>	<b>10.64</b>
Orkin	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 272873817	October (10/01)	715.00	8.81
	Operations and Housekeeping Services Total					715.00	8.81
<b>Orkin Total</b>						<b>715.00</b>	<b>8.81</b>
Scenario Learning, LLC	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	310 SUPP-CRE	LLC INV103173	September (9/30)	4,737.00	0.00
	Non K12 Curriculum Total					4,737.00	0.00
<b>Scenario Learning, LLC Total</b>						<b>4,737.00</b>	<b>0.00</b>
Dutch Ryan Plumbing	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 119 LLC 136	August (8/20) September (9/16)	555.00 189.00	6.84 2.33
	Operations and Housekeeping Services Total					744.00	9.17
<b>Dutch Ryan Plumbing Total</b>						<b>744.00</b>	<b>9.17</b>
PAR Inc.	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	280 SPED	LLC IN-00356578	July (7/23)	7,336.60	139.89
	Non K12 Curriculum Total					7,336.60	139.89
<b>PAR Inc. Total</b>						<b>7,336.60</b>	<b>139.89</b>
UBEO Business Services	Equipment Rental Expense	55304 Facilities & Equipment Rental Expense : Equipment Rental	101 General	LLC 4666189	October (10/14)	2,191.41	27.01
	Equipment Rental Expense Total					2,191.41	27.01
<b>UBEO Business Services Total</b>						<b>2,191.41</b>	<b>27.01</b>
VC Furniture & Facility Services	Operations and Housekeeping Services	53400 Rent and Utilities : Repairs and Maintenance	101 General	LLC 2001	September (9/26)	845.00	10.42
	Operations and Housekeeping Services Total					845.00	10.42
<b>VC Furniture &amp; Facility Services Total</b>						<b>845.00</b>	<b>10.42</b>
City of Simi Valley	Utilities	53302 Rent and Utilities : Utilities, CAM, and Real Estate	101 General	LLC 70843309	October (10/16)	1,156.59	14.26
	Utilities Total					1,156.59	14.26
<b>City of Simi Valley Total</b>						<b>1,156.59</b>	<b>14.26</b>
Interpreters Unlimited	Outside Service-General	51801 Professional Svcs & Outside Labor : Other Professional Services	101 General	LLC 402051	September	525.00	0.00
	Outside Service-General Total					525.00	0.00
<b>Interpreters Unlimited Total</b>						<b>525.00</b>	<b>0.00</b>
Rosetta Stone LLC	Non K12 Curriculum	56410 Program Fees & Other Instructional : Program Fees - Non K12 Curriculum	360 SUPP - ELD Support	LLC R5503771	August (8/18)	2,160.00	623.90
	Non K12 Curriculum Total					2,160.00	623.90
<b>Rosetta Stone LLC Total</b>						<b>2,160.00</b>	<b>623.90</b>
Smart & Final	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	9242024	September	68.60	0.85
	Office Expense Total					68.60	0.85
<b>Smart &amp; Final Total</b>						<b>68.60</b>	<b>0.85</b>
Dropbox	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	GDN15N4YP5VS	September	119.88	1.48
	Dues and Memberships Total					119.88	1.48
<b>Dropbox Total</b>						<b>119.88</b>	<b>1.48</b>
Google LLC	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	6145-8575-3379	October	12.00	4.00
	Dues and Memberships Total					12.00	4.00
<b>Google LLC Total</b>						<b>12.00</b>	<b>4.00</b>
Dropbox Cashback	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	10072024	October	(23.98)	(0.30)
	Dues and Memberships Total					(23.98)	(0.30)
<b>Dropbox Cashback Total</b>						<b>(23.98)</b>	<b>(0.30)</b>
CA Secretary of State	Legal	51807 Professional Svcs & Outside Labor : Legal	101 General	8196730	October	175.00	0.00
	Legal Total					175.00	0.00
<b>CA Secretary of State Total</b>						<b>175.00</b>	<b>0.00</b>
Successories	Office Expense	52802 Office Supplies Expense : Office Supplies - COS	101 General	SO-629682 / 5443909	October	295.62	3.64
	Office Expense Total					295.62	3.64
<b>Successories Total</b>						<b>295.62</b>	<b>3.64</b>
Amazon B2B Prime	Dues and Memberships	55801 Dues, Memberships & Research Svcs : Memberships	101 General	D01-0906924-6774631	October	132.99	1.64
	Dues and Memberships Total					132.99	1.64
<b>Amazon B2B Prime Total</b>						<b>132.99</b>	<b>1.64</b>
<b>Grand Total</b>						<b>217,262.88</b>	<b>6,372.12</b>



APPROVED

**TO: INSIGHT AT SAN JOAQUIN  
GOVERNING BOARD**

**BOARD REPORT #07**

**VIA: INSIGHT STAFF**

December 9, 2024

**SUBJECT:** Arts, Music, and Instructional Materials Block Grant Plan Update

**PROPOSAL:** It is proposed that the Governing Board of Insight at San Joaquin approve the updated Arts, Music, and Instructional Materials Block Grant Plan.

**BACKGROUND:** Assembly Bills 181 and 185 established the Arts, Music, and Instructional Materials Block Grant. The funds are flexible and can be used for instructional materials, professional development, improving school climate, costs related to COVID-19, and general operational costs. The school must revise the plan to account for increased operational expenses, which include health benefits.

**BUDGET IMPLICATIONS:** Upon approval, entitlements will be spent in accordance with the plan.

**RECOMMENDATIONS:** It is recommended that the Governing Board approve the updates to the Arts, Music, and Instructional Materials Block Grant Plan.

**RESPECTFULLY SUBMITTED**

Kimberly Odom  
Head of School

**PREPARED BY:**

Krista Mount  
Director of Categorical Programs

**PRESENTED BY:**

Krista Mount  
Director of Categorical Programs

Ayes: 2

No: 0

Abstain: 1



Approved: Yes Witnessed: Casey Robinson Date: 12/9/2024

Name	Aye	No	Abstain	Absent	Moved	Second
Fred Vallergera	X					X
Deanna Vallergera	X				X	
Jason Jones			X			







## Arts, Music, and Instructional Materials Block Grant Plan

LEA Name	Total Grant Allocation
Insight at San Joaquin	\$120,014
Funding Timeline	Date of Governing Board Approval
March 2023 to June 2026	March 7, 2023, Updated December 9, 2024
Contact Person Name and Title	Contact Person Email
Krista Mount, Director of Categorical Programs	kmount@caliva.org

### Allowable Use of the Arts, Music, and Instructional Materials Discretionary Block Grant

Pursuant to Section 134(a) of Assembly Bill (AB) 181 (Chapter 52, Statutes of 2022) as amended by Section 56 of AB 185 (Chapter 571, Statutes of 2022), funds are available to:

1. Obtain standards-aligned professional development and instructional materials, in the following subject areas:

- Visual and performing arts
- World languages
- Mathematics
- Science, including environmental literacy
- English language arts, including early literacy
- Ethnic studies
- Financial literacy, including the content specified in Section 51284.5 of the California Education Code
- Media Literacy
- Computer Science
- History-social science

2. Obtain instructional materials and professional development aligned to best practices for improving school climate, including training on de-escalation and restorative justice strategies, asset-based pedagogies, anti bias, transformative social-emotional learning, media literacy, digital literacy, physical education, and learning through play.

3. Develop diverse book collections and obtain culturally relevant texts, including leveled texts, in both English and pupils' home languages, to support pupils' independent reading. It is the intent of the Legislature that these book collections and culturally relevant texts be used to provide support for pupils through the establishment of site-based school and classroom libraries that are culturally relevant to pupils' home and community experiences and be available in English, pupils' home language, or a combination of more than one language.

4. Operational costs, including but not limited, to retirement and health care cost increases.

5. As related to the COVID-19 pandemic, acquire personal protective equipment, masks, cleaning supplies, COVID-19 tests, ventilation upgrades, and other similar expenditures, if they are necessary to keep pupils and staff safe from COVID-19 and schools open for in-person instruction.



## Arts, Music, and Instructional Materials Block Grant Plan

LCAP Goal Focus Area	LCAP Goal
<b>Goal 1: Student Achievement</b>	Increase student achievement and proficiency across all metrics for all sub-groups of pupils, including unduplicated pupils and those with disabilities.
<b>Goal 2: Engagement and School Climate</b>	Increase the level of student and family engagement with the school as measured by attendance rates, withdrawal rates, and suspension rates.
<b>Goal 3: Conditions for Learning</b>	Provide all pupils access to standards-aligned courses in well-rounded curriculum taught by appropriately assigned and credentialed teachers, by utilizing 21st Century technology and targeted programs and services.
<b>Goal 4: Graduation</b>	Increase graduation rate as a school and by each reported subgroup by 3% each year as measured by DASS graduation rate.

**A description of how the Arts, Music, Instructional Materials Block Grant funds are being coordinated with other funds received by the district.**

Our school understands the importance of coordinating resources and funding toward common goals to ensure improvement in student outcomes, thus funding received as part of this grant is allocated in alignment with the actions described within this plan as well as those described in our LCAP. All funding is coordinated and allocated toward actions, services, and programs designed to provide quality instruction, interventions, and support to all students.

### Expenditure Plan

The following table provides the school's expenditure plan for how it will use the Arts, Music, Instructional Materials Block Grant funds to support standards-aligned instruction materials, and provide for operational costs, including retirement and healthcare cost increases.

Identified Areas	Planned Expenditures
Standards-aligned Instructional Materials	\$61,203
Operational Costs	\$58,811
<b>Total Funds</b>	<b>\$120,014</b>





**TO: INSIGHT AT SAN JOAQUIN  
GOVERNING BOARD**

**BOARD REPORT #05**

**VIA: INSIGHT STAFF**  
December 9, 2024

**APPROVED**

**SUBJECT:** Comprehensive School Safety Plan Update

**PROPOSAL:** It is proposed that the Governing Board of Insight at San Joaquin approve the Comprehensive School Safety Plan Update.

**BACKGROUND:** Schools must annually issue a Comprehensive School Safety Plan (The Plan) in accordance with Senate Bill 187 and California Education Code 32280–32289.5. The Plan was reviewed with educational partners and updates were made. The updates are listed in the Safety Plan Review, Evaluation, and Amendment Procedures section on page 21.

**BUDGET IMPLICATIONS:** There are no budget implications.

**RECOMMENDATIONS:** It is recommended the Governing Board approve the Comprehensive School Safety Plan.

**RESPECTFULLY SUBMITTED:**  
Kimberly Odom  
Head of School

**PREPARED BY:**

Kimberly Odom  
Head of School

**PRESENTED BY:**

Morgan Vincent  
Academic Administrator

Ayes: 3                      No: 0                      Abstain: 0

**Approved:** Yes    **Witnessed:** *Casey Robinson*    **Date:** 12/9/2024

Name	Aye	No	Abstain	Absent	Moved	Second
Fred Vallerga	X				X	
Deanna Vallerga	X					X
Jason Jones	X					



# Comprehensive School Safety Plan

## 2024-2025 School Year

**School:** Insight at San Joaquin  
**CDS Code:** 39-68627-0133116  
**District:** Insight at San Joaquin  
**Address:** 50 Moreland Road  
Simi Valley, CA 93065  
**Date of Adoption:** December 9, 2024  
**Date of Update:**  
**Date of Review:**  
- with Staff  
- with Law Enforcement  
- with Fire Authority

**Approved by:**

Name	Title	Signature	Date
Kimberly Odom	Head of School		





## Comprehensive School Safety Plan Purpose

Effective January 1, 2019, Assembly Bill 1747 (Rodriguez), School Safety Plans, became law. This bill requires that during the writing and development of the comprehensive school safety plan (CSSP), the school site council or safety committee consult with a fire department and other first responder entities in addition to currently required entities. It requires the CSSP and any updates made to the plan to be shared with the law enforcement agency, the fire department, and the other first responder entities.

The California Education Code (sections 32280-32288) outlines the requirements of all schools operating any kindergarten and any grades 1 to 12, inclusive, to write and develop a school safety plan relevant to the needs and resources of that particular school.

In 2004, the Legislature and Governor recast and renumbered the Comprehensive School Safety Plan provisions in SB 719 and AB 115. It is the intent of the Legislature in enacting the provisions to support California public schools as they develop their mandated comprehensive safety plans that are the result of a systematic planning process, that include strategies aimed at the prevention of, and education about, potential incidents involving crime and violence on school campuses.

The historical requirement of the Comprehensive School Safety Plan was presented in Senate Bill 187, which was approved by the Governor and chaptered in 1997. This legislation contained a sunset clause that stated that this legislation would remain in effect only until January 1, 2000. Senate Bill 334 was approved and chaptered in 1999 and perpetuated this legislation under the requirement of the initial legislation.

Comprehensive School Safety Plans are required under SB 719 & AB 115 and contains the following elements:

Assessment of school crime committed on school campuses and at school-related functions

- Child abuse reporting procedures
- Disaster procedures
- Suspension and expulsion policies
- Procedures to notify teachers of dangerous pupils
- Discrimination and harassment policies
- School wide dress code policies
- Procedures for safe ingress and egress
- Policies enacted to maintain a safe and orderly environment
- Rules and procedures on school discipline
- Hate crime reporting procedures

The Comprehensive School Safety Plan will be reviewed and updated by March 1st every year. In July of every year, the school will report on the status of its school safety plan including a description of its key elements in the annual school accountability report card.

<https://ca.insightschools.net/>

A copy of the Comprehensive School Safety Plan is available for review at .

## Safety Plan Vision

Our school will support students with a culture that provides a positive and encouraging environment allowing each individual student to thrive and achieve their maximum academic success.



## **Components of the Comprehensive School Safety Plan (EC 32281)**

### **Insight at San Joaquin Safety Committee**

#### **Assessment of School Safety**

- Site based surveys: parents, students, and staff
- Annual school safety protocols and procedures review

#### **Strategies and Programs to Provide and Maintain a High Level of Safety (EC 32281(a)1, items A-J)**

In accordance with Ed Code 32281 (Comprehensive School Safety Plan), section (f)

(1) A school district or county office of education may, in consultation with law enforcement officials, elect to not have its school site council develop and write those portions of its comprehensive school safety plan that include tactical responses to criminal incidents that may result in death or serious bodily injury at the schoolsite. The portions of a school safety plan that include tactical responses to criminal incidents may be developed by administrators of the school district or county office of education in consultation with law enforcement officials and with a representative of an exclusive bargaining unit of employees of that school district or county office of education, if he or she chooses to participate. The school district or county office of education may elect not to disclose those portions of the comprehensive school safety plan that include tactical responses to criminal incidents.

(2) As used in this article, "tactical responses to criminal incidents" means steps taken to safeguard pupils and staff, to secure the affected school premises, and to apprehend the criminal perpetrator or perpetrators.



**(A) Child Abuse Reporting Procedures (EC 35294.2 [a] [2]; PC 11166)**



## Information

Insight Schools are committed to supporting the safety and well-being of our students and desires to facilitate the prevention of and response to child abuse and neglect. The policy was created to ensure that all employees are provided training and support for preventing, recognizing, and promptly reporting known or suspected child abuse or neglect.

## Definitions

Child abuse or neglect includes the following: (Penal Code 11165.5, 11165.6)

1. A physical injury or death inflicted by other than accidental means on a child by another person
2. Sexual abuse of a child, including sexual assault or sexual exploitation, as defined in Penal Code 11165.1
3. Neglect of a child as defined in Penal Code 11165.2
4. Willful harming or injuring of a child or the endangering of the person or health of a child as defined in Penal Code 11165.3
5. Unlawful corporal punishment or injury as defined in Penal Code 11165.4

Child abuse or neglect does not include:

1. A mutual affray between minors (Penal Code 11165.6)
2. An injury caused by reasonable and necessary force used by a peace officer acting within the course and scope of his/her employment (Penal Code 11165.6)
3. An injury resulting from the exercise by a teacher, vice principal, principal, or other certificated employee of the same degree of physical control over a student that a parent/guardian would be privileged to exercise, not exceeding the amount of physical control reasonably necessary to maintain order, protect property, protect the health and safety of students, or maintain proper and appropriate conditions conducive to learning (Education Code 44807)
4. An injury caused by a school employee's use of force that is reasonable and necessary to quell a disturbance threatening physical injury to persons or damage to property, to protect himself/herself, or to obtain weapons or other dangerous objects within the control of the student (Education Code 49001)
5. Physical pain or discomfort caused by athletic competition or other such recreational activity voluntarily engaged in by the student (Education Code 49001)
6. Homelessness or classification as an unaccompanied minor (Penal Code 11165.15)

Mandated reporters include, but are not limited to, teachers; instructional aides; classified employees; certificated pupil personnel employees; administrative officers; athletic coaches, administrators, and directors; licensed nurses or health care providers; and administrators, presenters, and counselors of a child abuse prevention program. (Penal Code 11165.7)

Reasonable suspicion means that it is objectively reasonable for a person to entertain a suspicion, based upon facts that could cause a reasonable person in a like position, drawing when appropriate on his/her training and experience, to suspect child abuse or neglect. However, reasonable suspicion does not require certainty that child abuse or neglect has occurred, nor does it require a specific medical indication of child abuse or neglect. (Penal Code 11166)

## Reportable Offenses

- A mandated reporter shall make a report using the procedures provided below whenever, in his/her professional capacity or within the scope of his/her employment, he/she has knowledge of or observes a child or dependent adult whom the mandated reporter knows or reasonably suspects has been the victim of abuse or neglect. (Penal Code 11166 and Welfare and Institutions Code 15630)
- Any mandated reporter who has knowledge of or who reasonably suspects that a child is suffering serious emotional damage or is at a substantial risk of suffering serious emotional damage, based on evidence of severe anxiety, depression, withdrawal, or untoward aggressive behavior toward self or others, may make a report to the appropriate agency. (Penal Code 11166.05, 11167)
- Any person shall notify a law enforcement agency if he/she reasonably believes that he/she has observed the commission of a murder, rape, or lewd or lascivious act by use of force, violence, duress, menace, or fear of immediate and unlawful bodily injury, where the victim is a child under age 14. (Penal Code 152.3, 288)

## Responsibility for Reporting

- The reporting duties of mandated reporters are individual and cannot be delegated to another person. (Penal Code 11166)





- When two or more mandated reporters jointly have knowledge of a known or suspected instance of child abuse or neglect, the report may be made by a member of the team selected by agreement and a single report may be made and signed by the selected member of the reporting team. Any member who has knowledge that the member designated to report has failed to do so shall thereafter make the report. (Penal Code 11166 and Welfare and Institutions Code 15630)
- No supervisor or administrator shall impede or inhibit a mandated reporter from making a report. (Penal Code 11166 and Welfare and Institutions Code 15630)

## Reporting Procedures

### Initial Telephone Report

- Mandated reporters shall call 9-1-1 for immediate emergencies.
- Immediately or as soon as practicable after knowing or observing suspected child abuse or neglect, a mandated reporter as defined by law shall make an initial report by telephone. When the initial telephone report is made, the mandated reporter shall note the name, address, and age of child involved, provide a clear description of suspected child abuse or neglect, and note the name of the screening social worker who took the call and any instructions given. (Penal Code 11165.9, 11166)
- Where the situation is not an emergency needing the police, reports should be made to the Child Protective Services (CPS) in the county that the student lives.
  - o County Emergency Response Child Abuse Reporting Telephone Numbers <https://www.cdss.ca.gov/reporting/report-abuse/child-protective-services/report-child-abuse>

### Written Report

- After making the initial phone call and within 36 hours of knowing or observing the information concerning the incident, the mandated reporter shall then prepare and either send, fax, or electronically submit to the appropriate agency a written follow-up report, which includes a completed Department of Justice form, Suspected Child Abuse Report (SS 8572). (Penal Code 11166, 11168)
  - o The Department of Justice forms are available: [https://oag.ca.gov/sites/all/files/agweb/pdfs/childabuse/ss\\_8572.pdf?](https://oag.ca.gov/sites/all/files/agweb/pdfs/childabuse/ss_8572.pdf?)
- The mandated reporter shall make a report even if some of this information is not known or is uncertain to him/her. (Penal Code 11167)
- Information relevant to the incident of child abuse or neglect also may be given to an investigator from an agency that is investigating the case. (Penal Code 11167)
- The mandated reporter may give to an investigator from an agency investigating the case, including a licensing agency, any information relevant to an incident of child abuse or neglect or to a report made for serious emotional damage pursuant to Penal Code 11166.05. (Penal Code 11167)
- Employees shall keep a copy of the complete written report that is filed.

### Internal Reporting

- The mandated reporter shall not be required to disclose his/her identity to the employer, supervisor, school principal, school counselor, co-worker, or other person. (Penal Code 11166)
- Employees reporting abuse or neglect to an appropriate agency are encouraged, but not required, to notify their supervisor, principal, school counselor, co-worker, or other person as soon as possible after the initial telephone report to the appropriate agency. When so notified, they shall provide the mandated reporter with any assistance necessary to ensure that reporting procedures are carried out in accordance with law, and Board policy.
  - Reporting the information to a supervisor, principal, school counselor, co-worker, or other person shall not be a substitute for making a mandated report to the appropriate agency. (Penal Code 11166)

### Internal Action for Incidents Involving School Employees

- If an employee has knowledge of or reasonably suspects that another school employee, or contractor is engaged in conduct that may be an indication of suspected abuse or neglect, they must take the following actions:
  - o Call 9-1-1- for immediate emergencies
  - o File a Suspected Child Abuse Report by telephone to the police
  - o Submit a Suspected Child Abuse Report form
  - o Immediately notify their supervisor of the alleged inappropriate conduct and complete a confidential student/staff incident report
- The director or designee so notified shall provide the mandated reporter with any assistance necessary to ensure that reporting procedures are carried out in accordance with law, and Board policy.
  - After completion of the appropriate written follow-up report, and after providing the form to the appropriate agency, the mandated reporter shall provide that form to the director or designee. The mandated reporter shall not be required to disclose





his/her identity and may remove his/her name from the form. (Penal Code 11166)

- The director or designee shall maintain a record of all reported cases of suspected student abuse regarding employees or others. All complaints and allegations of student abuse shall be kept confidential except as necessary to carry out the investigation or take other subsequent necessary action.
- No student shall be required or asked to meet with the employee, or contractor who has allegedly abused that student. If the employee, or contractor suspected of sexual misconduct is a school employee, or contractor, then during the investigation, he/she shall discontinue contact with students.

#### Discipline

- Any school employee, or contractor who is determined, after an investigation, to have engaged in any activity in violation of this policy/administrative regulation, including, but not limited to failure to report known or reasonably suspected child abuse and neglect, will be subject to disciplinary action up to and including discharge.
- The school will discipline any individual who retaliates against any person who reports suspected child abuse and/or neglect or who retaliates against any person who testifies, assists, or participates in an investigation, a proceeding, or a hearing relating to a child abuse and/or neglect complaint. Retaliation includes, but is not limited to, any form of intimidation, reprisal or harassment.

#### Failure to Report

- Any person mandated by Penal Code who fails to report any instance of child abuse or neglect that he/she know or reasonably suspects to exist may incur criminal, civil, and/or professional liability. Failure to report is a misdemeanor and punishable by confinement in county jail for a term not to exceed six months or by a fine of not more than one thousand dollars (\$1,000) or by both. However, if "death or great bodily injury" happens to the child as a result of the abuse, the mandated reporter is guilty of a misdemeanor punishable by not more than one year in a county jail, by a fine of not to exceed five thousand dollars (\$5,000) or by both. (Penal Code 11166)

#### Training

- Within the first six weeks of each school year, the school shall provide training on mandated reporting requirements to employees and persons working on their behalf who are mandated reporters as defined by law. Any school personnel hired during the school year shall receive training within the first six weeks of employment. (Education Code 44691; Penal Code 11165.7)
- Training of mandated reporters shall include, but not necessarily be limited to, training in identification and mandated reporting of child abuse and neglect. In addition, the training shall include information that failure to report an incident of known or reasonably suspected child abuse or neglect as required by law is a misdemeanor punishable by imprisonment and/or a fine as specified. (Education Code 44691; Penal Code 11165.7)
- The school shall obtain and retain proof of each mandated reporter's completion of the training. (Education Code 44691)
- Unless otherwise specifically provided, the absence of training shall not excuse a mandated reporter from the duties imposed under the Penal Code.

#### Parent/Guardian Complaints

- Upon request, the school shall provide parents/guardians with a copy of this board policy which contain procedures for reporting suspected child abuse occurring at a school site to appropriate agencies. For parents/guardians whose primary language is other than English, such procedures shall be in their primary language and, when communicating orally regarding those procedures, an interpreter shall be provided.
- To file a complaint against a school employee, parents/guardians may file a report by telephone, in person, or in writing with any appropriate agency identified above under "Reporting Procedures." If a parent/guardian makes a complaint about an employee to any other employee, the employee receiving the information shall notify the parent/guardian of procedures for filing a complaint with the appropriate agency. The employee also is obligated pursuant to Penal Code 11166 to file a report himself/herself using the procedures described above for mandated reporters.
- In addition, if the child is enrolled in special education, a separate complaint may be filed with the California Department of Education pursuant to 5 CCR 4650.

#### Notifications

- The school shall provide to all new employees who are mandated reporters as defined by Penal Code, Welfare and Institutions Code, and this policy a statement that informs them of their status as mandated reporters, of their reporting obligations under Penal Code 11166, and of their confidentiality rights under Penal Code 11167.
- Before beginning employment, employees shall sign a statement indicating that they have knowledge of the reporting obligations under Penal Code 11166 and that they will comply with those provisions. The signed statements shall be retained by the school. (Penal Code 11166.5)





• The school also shall notify all employees that:

1. A mandated reporter as defined by the Penal Code who reports a known or suspected instance of child abuse or neglect shall not be held civilly or criminally liable for making a report and this immunity shall apply even if the mandated reporter acquired the knowledge or reasonable suspicion of child abuse or neglect outside of his/her professional capacity or outside the scope of his/her employment. Any other person making a report shall not incur civil or criminal liability unless it can be proven that he/she knowingly made a false report or made a report with reckless disregard of the truth or falsity of the report. (Penal Code 11172)
2. If a mandated reporter as defined by the Penal Code fails to report an incident of known or reasonably suspected child abuse or neglect, he/she may be guilty of a crime punishable by a fine and/or imprisonment. (Penal Code 11166)
3. No employee shall be subject to any sanction by the school for making a report unless it can be shown that he/she knowingly made a false report or made a report with reckless disregard of the truth or falsity of the report. (Penal Code 11166)

#### Confidentiality

- Reports of suspected child abuse or neglect and information contained therein are confidential and may be disclosed only as follows:
  - o The identity of the reporting person(s) shall be disclosed only between child protective agencies; to counsel representing a child protective agency; to the district attorney in a criminal prosecution or in an action initiated under the Welfare and Institutions Code section 602 arising from alleged child abuse or neglect; to counsel appointed pursuant to subdivision (c) of the Welfare and Institutions Code section 317; to the county counsel or district attorney in an action initiated under Welfare and Institutions Code section 300 (dependent children); to a licensing agency when abuse or neglect in out-of-home care is suspected; by court order; in a criminal or civil proceeding; or when the person who reports waives confidentiality.
  - o The contents of the report shall only be disclosed to persons or agencies permitted under Section D.5.a. and Penal Code 11167(d) and 11675.5 which require that the identity of all person who report child abuse or neglect remain confidential.

#### **(B) Disaster Procedures (EC 35295-35297; GC 8607 and 3100)**

##### **Disaster Plan (See Appendix C-F)**

Since our school is a non-classroom based independent study program with no school buildings, the procedures for different emergency types apply to school events held in buildings not owned by the school. For example, for in-person state testing the school will rent or borrow space from school districts, county office of education, churches, libraries, and clubs. The emergency response procedures can apply to any of these settings. Our students, families, and staff occasionally meet in-person for student outings in public locations. Examples of these outings include visits to local community colleges, the zoo, museums etc.

##### **Public Agency Use of School Buildings for Emergency Shelters**

Non-classroom based charter school with no school buildings.

#### **(C) School Suspension, Expulsion and Mandatory Expulsion Guidelines**

This Pupil Suspension and Expulsion Policy has been established to promote learning and protect the safety and well-being of all students. When the policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction.

Staff shall enforce disciplinary rules and procedures fairly and consistently amongst all students. This Policy and its Administrative Procedures will be printed and distributed as part of the Student Handbook and will clearly describe discipline expectations.

Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, and the use of alternative educational environments, suspension and expulsion. During in-person activities or state testing, unruly student behavior can result in removal from the event and immediate pick-up by the legal guardian. It is the policy of Insight at San Joaquin to avoid restraint and seclusion of its students by all means necessary, except in situations in which the student is an immediate threat to him/herself or others.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion. Education Code 48900 and 48901 identifies reasons for suspension or expulsion.



A student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Improvement Act ("IDEIA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 (Section 504) is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. The School will follow Section 504 of the Rehabilitation Act, Individuals with Disabilities in Education Improvement Act (IDEIA), the Americans with Disabilities Act (ADA) of 1990 and all federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom the School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students.

**(D) Procedures to Notify Teachers of Dangerous Pupils (EC 49079)**

The school is committed to supporting the safety and well-being of our students and employees. The school has an affirmative duty to take reasonable steps to protect all students and provide employees with a safe work environment.

This Board Policy is adopted pursuant to Education Code section 49079.

A school must inform any teacher, counselor or administrator in a supervisory or disciplinary position when, based on records maintained by the school or received from law enforcement, it has information that, during the three previous school years, a pupil has engaged in, or is reasonably suspected to have engaged in, the following criminal or disruptive conduct at school, while going to or from school, or during a school sponsored activity:

- a. Causing, attempting, or threatening physical injury to another;
- b. Possessing, selling, or otherwise furnishing, a firearm, knife, or other dangerous object;
- c. Possessing, using or selling illegal drugs, alcohol, or drug paraphernalia;
- d. Committing or attempting to commit robbery or extortion;
- e. Damaging or attempting to damage school property;
- f. Stealing or attempting to steal school or private property;
- g. Committing an obscene act or engaging in habitual profanity or vulgarity;
- h. Possessing, offering, arranging or negotiating to sell, any drug paraphernalia;
- i. Pupils who were suspended from school due to disrupting school activities or otherwise willfully defying the valid authority or supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties.

Any information received by a teacher pursuant to this Board Policy shall be received in confidence for the limited purpose for which it was provide and shall not be further disseminated by the teacher.

The information provided shall be from the previous three school years.

Education Code section 49079 provides that no school administrator or employee shall be civilly or criminally liable for providing information under this statute unless it is proven that the information was false and that the officer or employee knew that the information was false, or was made with a reckless disregard for the truth or falsity of the information provided.

An employee who knowingly fails to provide mandated information about a pupil is guilty of a misdemeanor punishable by up to six months in jail, or up to \$1,000 fine or both.

A student or his/her parent or guardian must notify a school at the time of enrollment if the student was expelled previously from another school and must disclose the reason for the expulsion. Ed. Code 48915.1.





## **(E) Sexual Harassment Policies (EC 212.6 [b])**

### Prevention of Sexual Misconduct and Abuse Board Policy

The School is committed to providing students with a safe and supportive learning environment and to protecting its students from sexual misconduct and abuse. The responsibility to protect students from sexual misconduct and abuse is shared by the Board, administrators, teachers, other employees, volunteers, parents, state agencies, and law enforcement.

Sexual misconduct or abuse in any form and as defined in this policy is expressly prohibited by the School. While the School recognizes the importance of safe and appropriate communication and interaction between students and adults in student achievement, successful learning, and instruction, clear and reasonable boundaries for educator-student relationships are necessary to protect students from sexual misconduct and abuse and to protect adults from misunderstandings and false accusations. This policy outlines safe and appropriate boundaries for stakeholder interactions with students and strictly prohibits inappropriate or questionable conduct toward students by any stakeholders, including employees.

This policy applies to all stakeholders, including administrators, employees, volunteers, and vendors providing instructional services to students. In this policy, these individuals will be referred to as "adults." This policy must be reviewed and applied in conjunction with the School's mandating reporting policy and Professional Boundaries Policy.

#### Sexual Misconduct and Abuse Prohibited

Adults are prohibited from engaging in sexual misconduct and abuse of students, which includes unnecessary or intimate physical touching; dating; making sexual advances; seeking romantic or sexual relationships; seeking an emotional bond for the benefit of the adult; giving personal gifts that are intimate in nature; intentionally being alone with a student away from school; telling/allowing inappropriate sexual jokes or stories; becoming overly interested or attached, or showing undue attention toward, a specific student or students; any behavior that could be described as "grooming" behavior; having conversations of an intimate or sexual nature not related to the adult's professional responsibilities; and sexual contact.

This is a non-exhaustive list. Adults must also generally avoid any other conduct toward a student that would cause a reasonable person to suspect inappropriate behavior. Although this policy gives specific, clear direction, it is each adult's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders.

#### In-Person Communication and Interaction

Personal contact between adults and students must be nonsexual, appropriate to the circumstances, and unambiguous in meaning. Adults should avoid the appearance of impropriety in their interactions with students. Behaviors that can create an appearance of impropriety include, but are not limited to:

- Conducting ongoing, private conversations with individual students that are unrelated to academics, school activities, or the well-being of students and that take place in locations inaccessible to others;
- Inviting a student or students for home visits;
- Visiting the homes of students;
- Inviting students for social contact off school grounds without the permission or knowledge of parents/guardians; and
- Transporting students in personal vehicles without the parents or supervisors, adults, including employees and volunteers of the School, should respect boundaries consistent with their roles as educators, mentors, and caregivers. Violations of these boundaries include:
  - Physical contact with a student that could be reasonable interpreted as constituting sexual harassment;
  - Exposing students to sexualized content via pictures, videos, internet, or social media;
  - Unnecessarily invading a student's personal privacy or physical space;
  - Singling out a particular student or group of students for personal attention and friendship beyond the bounds of an appropriate adult/student relationship;
  - Conversation of a sexual nature with students not related to the adult's professional responsibilities or role; and
  - A flirtatious, romantic, or sexual relationship with a student.



### Electronic Communication

Digital technology and social networking provide multiple means for adults, educators and other employees to communicate appropriately with students and personalize learning. Such communication between adults and students must be transparent, accessible to supervisors and parents/guardians, nonsexual, appropriate to the circumstances, unambiguous in meaning, and professional in content and tone.

As with in-person communications, adults should avoid appearances of impropriety and refrain from inappropriate electronic communications with students. Factors to consider in determining whether an electronic communication is inappropriate include, but are not limited to:

- The subject, content, purpose, authorization, timing, and frequency of the communication;
- Whether there was an attempt to conceal the communication from supervisors and/or parents/guardians;
- Whether the communication could be reasonably interpreted as soliciting sexual contact or a romantic relationship; and
- Whether the communication was sexually explicit.

Adults must restrict one-on-one, electronic communications with individual students to accounts, systems, and platforms that are provided by and accessible to the School.

If an adult does not have access to a Board-approved communication account, system, or platform and there is a time-sensitive or emergency, School-related matter that must be communicated to students, the adult may use a personal communication account, system, or personal social media to communicate this information. The adult must note the date, time, and nature of the contact and make this information available to the School upon request as communications with the student on behalf of the School are the property of the School.

Parents/guardians are encouraged to have access to their student's social networking and digital communications and to supervise their student's use of these methods of communication.

### Reporting of Violations

Adults are required to report any case of suspected sexual misconduct or abuse to their supervisor (or to the Principal for non-employees), who shall report such information to the proper authorities and Human Resources. This requirement is in addition to the requirements for reporting cases of suspected child abuse or neglect under any mandatory reporting laws. In addition, adults are required to report suspected violations of this policy regarding in-person and electronic communications with students to their supervisor (or to the Principal for non-employees), who shall report such information to the proper authorities and Human Resources. Adults should not attempt to confront the perpetrator or conduct their own investigation. Instead, the matter must be referred to the School and a child protective agency as stated herein. For the privacy of the student and to avoid circulating harmful or incorrect information, adults must not unnecessarily disseminate information about a pending incident.

### Training

The Board will provide training for employees and volunteers on the prevention of misconduct and abuse, in addition to any required training under mandated reporting laws. Information about this policy will also be disseminated to employees, volunteers, students and parents and posted on the School's website.

### Investigation and Consequences for Violations

All complaints of sexual abuse or misconduct shall be investigated by the School. Violations of this policy may be considered egregious and gross misconduct and form the basis for immediate termination without regard to the principles of progressive discipline. Employees found to be in violation of this policy may be disciplined, up to and including termination from employment. Volunteers found to be in violation of this policy may be ineligible for continued/future volunteer services and may be removed from their volunteer role.

### **(F) School-wide Dress Code Relating to Gang-Related Apparel (EC 35183)**

Clothing worn to Insight class sessions and events (including virtual events where webcams are used) should promote the learning process and appropriate behavior. The primary responsibility for student dress and appearance rests with the parent/legal guardian. The primary purpose of school is education. Therefore, all aspects of school must be considered with that objective in mind.





Clothing shall be neat, clean, safe, and not disruptive to instructional activities. Crude or vulgar commercial lettering or printing, and pictures depicting drugs, tobacco, alcoholic beverages, racial/ethnic slurs, gang affiliation, hateful speech, or that are sexually suggestive are not acceptable. Items such as beach attire, short shorts, short skirts, clothing exposing undergarments, or unsafe accessories are not allowed. Any clothing/accessory that may be deemed dangerous are unacceptable. Inappropriately revealing clothing, including but not limited to, see-through and/or strapless tops are not allowed. The wearing/displaying of apparel that is disruptive to the school environment is not allowed. Refusal to adhere to these dress standards will result in disciplinary action.

### **(G) Procedure for Safe Ingress and Egress of Pupils, Parents, and Staff to and from School (EC 35294.2)**

We are a nonclassroom-based charter schools with no school facilities.

### **(I) School Discipline Rules and Consequences (EC 35291 and EC 35291.5)**

## **Insight at San Joaquin Student Conduct Code**

### **Conduct Code Procedures**

#### **Classroom Code of Conduct**

Freedom of speech and expression is valued not only throughout society but also in the academic setting. No more is this so than in the classroom. In ISSJ, a classroom is defined as many different locations. These may include but are not limited to:

- Online classroom sessions
- Class Connect
- Any ISSJ community area

As a diverse community of learners, students must strive to work together in a setting of civility, tolerance, and respect for each other in an environment that does not distract from the mutual commitment to academic inquiry and reflection. To that end, the following code of classroom etiquette has been established.

1. When participating in class dialogue, no one monopolizes discussions to the exclusion of others, either in terms of time or opinions expressed.
2. Conflicting opinions among members of a class are respected and responded to in a professional manner.
3. No side conversations or other distracting behaviors are engaged in during class discussions or presentations.
4. No offensive comments, language, or gestures are part of the classroom environment.
5. Posting anonymous messages is not permitted unless authorized by the course's online teacher. Impersonating another person is also strictly prohibited.
6. Use only your own user name and password, and do not share these with anyone.
7. Do not post personal information, (personal details, YouTube, Facebook, email address, etc.)
8. Do not interfere with other users' ability to access ISSJ or disclose anyone's password to others or allow them to use another user's account. You are responsible for all activity that is associated with your username and password.
9. Do not download, transmit or post material that is intended for personal gain or profit, non-ISSJ commercial activities, non-ISSJ product advertising, or political lobbying on an ISSJ-owned instructional computing resource.
10. Do not use ISSJ instructional computing resources to sell or purchase any illegal items or substances.
11. Do not upload or post any software on ISSJ instructional computing resources that are not specifically required and approved for your assignments.
12. Do not post any MP3 files, compressed video, or other non-instructional files to any ISSJ server.
13. Posting material that is obscene or defamatory or which is intended to annoy, harass or intimidate another person. This includes distributing "spam" mail, chain e-mail, viruses, or other intentionally destructive content.

Adherence to this code of etiquette will enable students to receive the most from their academic endeavors and should be seen as a regular and voluntary compact among faculty and students. Any infraction of this code, however, that is deemed to be materially or substantially disruptive of the learning environment is cause for removal of a student from a class or for student disciplinary proceedings.

#### **Consequences**

- First warning
- Certified letter



- If problem continues, administrator phone conference
- Possible withdrawal
- Depending on the severity of each action, ISSJ reserves the right to withdraw student upon first action

This document describes the policies and guidelines for the use of the ISSJ and exists to ensure that all ISSJ students are aware of and understand their responsibilities when accessing and using ISSJ resources.

As a student enrolled in ISSJ, you should be aware of the above guidelines and expectations. Any activity that is not listed here, which violates local, state, or federal laws, is considered a violation of the Student Code of Conduct and

Acceptable Use Guidelines.

Failure to follow these guidelines will result in the:

- Removal of your access to ISSJ instructional computing resources, which would result in your inability to complete learning activities.
- Involvement with law enforcement agencies and possible legal action.
- Withdrawal from our program.

### **(K) Hate Crime Reporting Procedures and Policies Information**

Every student has the right to be protected from "hate-motivated" behavior. The Head of School shall promote harmonious relationships that enable students to gain a true understanding of the civil rights and social responsibilities of people in our society. Behavior or statements that degrade an individual on the basis of his/her race, ethnicity, culture, heritage, gender, gender identity or expression, sexual orientation, physical/mental attributes or religious beliefs or practices shall not be tolerated and may be considered "hate-motivated" speech or "hate-motivated" behavior. A "hate-motivated" comment or "bias incident" is biased conduct, speech, or expression that has an impact, but does not involve a criminal action.

Hate crimes (vandalism, physical assault, arson, etc.) are crimes which are motivated, in whole or in part, by bias, by the targeted individual or group's characteristics or perceived characteristics of disability, gender, gender identity or expression, nationality, race or ethnicity, religion, sexual orientation, religious beliefs or association with a person or group who has one of these characteristics. "Hate crimes" should be reported to law enforcement.

### **School Climate**

Everyday acts of intolerance and/or hate may manifest in a variety of ways: name-calling, slurs, sexual harassment, casual put downs regarding race, ethnicity, gender, size, abilities, perceived sexual orientation or gender identification. Administrators and teachers should actively work to promote a positive school climate. School staff are encouraged to:

- Work to establish a climate where casual slurs are uncommon and are challenged when they do occur. Set expectations of how students should speak to each other (in person and online), whether they are in or out of earshot of a teacher or administrator.
- Create a no-slur school by stating clear support for a safe, open learning environment free of slurs. Be specific: no insults related to ability, appearance, culture, gender, home language, race, ethnicity, religion, sexual orientation or social class will be tolerated.
- Check for signs of hostility, depression, or a marked change in behavior or academic performance, and reach out to the student's parents or guardians and/or the school counselor as appropriate.
- Model inclusive, pro-social behavior and interrupt moments of bias among staff.





If a "hate-motivated" comment or action occurs, school staff should be prepared to discuss how the school will respond.

## Reporting

Any student who feels that they are a victim of "hate-motivated" behavior shall immediately contact the principal or any trusted staff member with whom the student has a relationship. Reports can be made in writing or verbally and all complaints should be reported to an administrator. If the student believes that the situation has not been remedied by the principal or designee, the student may file a complaint through the Uniform Complaint Procedures.

Staff who receive notice of "hate-motivated" behavior or personally observe such behavior shall notify the principal.

## Grievance Procedures & Investigation

When a staff member first hears "hate speech" or "bias speech," they should immediately interrupt, address, and admonish the student making such comments. The staff member should do an initial inquiry with the victim-student to determine if a full investigation is needed. Included in that initial inquiry should be questions regarding the harm that the student has suffered, frequency and persistence of the behavior, and the history between the students. If the administrator determines that a full investigation is needed to learn more about the incident and/or to determine what happened, s/he should reference and complete the "Hate Speech/Discrimination Investigation Form" as they conduct their investigation. At the completion of the investigation, the administrator is responsible for providing the Investigation Form and supporting documents to the Director.

Once an administrator receives a report of "hate-motivated" behavior, and determines that a full investigation is needed, the administrator/investigator should begin their investigation immediately. If the administrator determines that a full investigation is needed, the administrator shall conduct a thorough and equitable investigation into the allegations and inform the victim-student/family regarding the status of the investigation. During the course of the investigation, the administrator should consider the following factors:

- Put safety first,

Denounce the act,

Investigate,

Involve others where necessary,

Provide accurate information and dispel misinformation, Support targeted students,

- Seek justice, avoid blame, and Promote healing.
- A student who has been found to have demonstrated "hate-motivated" behavior shall be subject to discipline in accordance with law, and Code of Conduct.
- Once the full investigation is complete, the administrator should:

o Debrief with their Director, investigation team, and staff to discuss the investigation process to review lessons learned,

o Expand the discussion to include relevant students, parents and guardians and community members, keeping in mind that an individual student's disciplinary record is confidential under state law and FERPA,

o Take notes about all suggestions and comments and include those with the Investigation Form, and Discuss all follow-up steps and use them to create a road map for change (if needed).

## Training

As necessary, the school shall provide counseling and appropriate sensitivity training and diversity education for students exhibiting "hate-motivated" behavior. The school shall also provide counseling, guidance and support, as necessary, to those students who are the victims of "hate-motivated" behavior.

The Head of School or designee shall ensure that staff receive training on recognizing "hate-motivated" behavior and on strategies to help respond appropriately to such behavior.

At the beginning of each school year, students and staff shall receive a copy of the school's board policy on "hate-motivated" behavior. The school shall provide age-appropriate instruction to help promote an understanding of and respect for human rights, diversity, and tolerance in a multicultural society and to provide strategies to manage conflicts constructively.



## **(J) Procedures to Prepare for Active Shooters**

### Active Shooter / Armed Assailant Situations

“Active shooter situations” are defined as those where an individual or individuals is “actively engaged in killing or attempting to kill people in a confined and populated area.” Active shooters / armed assailants frequently use firearms but attacks of this type can also be made with other types of weapons (knives, swords, etc.). These situations are unpredictable and evolve quickly. Because of this, individuals must be prepared to deal with an active shooter / armed assailant situation before law enforcement personnel arrive on the scene.

No single response fits all active shooter / armed assailant situations; therefore it is essential all members of the school staff know their options for response and are prepared to act decisively to protect their students and themselves.

### ACTIONS – ALL SCHOOL STAFF

1. All employees are authorized to take immediate action to protect themselves and students if they see or hear anything that causes them to believe an active shooter / armed assailant situation is occurring or is to about to occur.
  - a. Act immediately if you or your students:
    - hear a sound that might be gunfire.
    - see something that looks like a weapon being carried or used on or near the campus.
    - sense any other indication of active shooter / armed assailant threat.
  - b. Quickly evaluate which option (Run, Hide or Fight) will best protect you and your students.
  - c. Be decisive. Communicate your plan to your students and act quickly.
  - d. Call 911 and the School Office as soon as it is safe to do so.
  
2. Options: Run, Hide or Fight
  - a. RUN: If you can get yourself and your students safely away from danger, do so immediately.
    - Do not evacuate unless you...
    - o know with certainty, the exact location of assailant (do not trust unofficial, second hand accounts),
    - o and can visualize a route that will get your students and yourself safely off campus.
      - Don't carry anything with you.
    - o Police may mistake an item in your hands as a weapon.
    - o Leave everything behind.
      - If you encounter people along the way...
    - o Adults: Warn them and take them with if you can but don't stop if they refuse to come.
    - o Students: Warn any students you encounter and take them with if you. You may use reasonable force to take a student with you if you can do so without endangering yourself or the other students in your care.
      - Place terrain and buildings between you and the assailant to cover your escape.
      - Keep going until you are certain you are out of danger.
      - Call 911 as soon as it is safe to do so.
      - Keep your students with you.
  - b. HIDE: If you do not know the exact location of the assailant, get your students and yourself into the most secure location available and LOCKDOWN.
    - Lock the doors
    - Close and lock windows and close blinds or cover windows;
    - Turn off lights;
    - Barricade the doors with heavy furniture; be sure your barricade covers any glass in or near the door;
    - Silence all electronic devices;
    - Remain silent;
    - Position occupants spread out and out of line of site from room entrance.
    - Use text or email to communicate your location, the number of students or staff with you, if you have any wounded and the extent of the injuries;
    - Call 911 as soon as it is safe to do so.
    - Remain in place until evacuated by identifiable law enforcement officers.
  - c. FIGHT: Never seek out confrontation with an active shooter / armed assailant. If you are confronted by an active shooter / armed assailant and you have no safer option, take immediate action to disrupt or incapacitate the assailant. If you choose the FIGHT option, commit to your actions.





- If you are in LOCKDOWN (Hide), prepare yourself and your students for the possibility that the assailant may attempt to get in the room you are in.
- o Construct a strong barricade.
- o If you have another way out (a window or back door) use it while the assailant is attempting to get in.
- o If no other exit is available be prepared to disrupt the assailant by throwing objects at the assailant and running for the exit as soon as the assailant enters the room.
- o Use items in the environment as improvised weapons (fire extinguishers, staplers, books, cups, etc.)
- Staff members may consider using aggressive and violent force to surprise and overwhelm the assailant.
3. Call 911 and initiate a LOCKDOWN announcement as soon as you can do so safely. Work with the people you are with to do both calls simultaneously if possible.
- a. Provide as much information as possible (slow down – be calm):
- State the emergency: “I hear gunfire.” “I saw...”
- o Give information on people who are wounded.
- Location of the assailant (if known):
  - Description of the assailant (if known):
  - Your precise location: “room \_\_\_”
  - The number of children with you:
- b. Keep the line open, even if you can’t talk, unless instructed by the dispatcher to end the call.
4. Special Topics
- a. Injuries: Your response to injured persons will need to vary given the specific circumstances that are present and the response option (Run, Hide or Fight) you are engaged in.
- Run – If you encounter injured persons while you are trying to get out of danger and you have children with you, you must place their safety ahead of the injured person. Take note of where the injured person is and report the location as soon as you get to safety.
  - Hide – If someone is injured where you are hiding, secure the room before tending to the wounded. As soon as it is safe to do so, apply first aid using any supplies that are available. If necessary, use articles of clothing as improvised dressing for wounds and apply direct pressure to control bleeding.
  - Fight – This is always the option of last resort because the probability of injury is highest when you are in close proximity to the assailant. Commit to your plan. Do not stop to tend to the wounded until it is safe to do so.
- o If you’re intention is to disrupt the assailant to allow as many people to escape as possible, stick to that plan.
- o If your plan is to incapacitate the assailant, keep fighting until the assailant is incapacitated and the weapon and assailant are under control.
- b. Law Enforcement: If you encounter law enforcement officers...
- Immediately raise your hands in the air and display your open palms.
  - Don’t run up to officers or attempt to hug or talk to them.
  - Don’t talk unless they ask you a question.
  - Do exactly what they tell you to do.
- c. Weapons: If the assailant loses control of a weapon, exercise extreme care when securing it:
- Do not pick up the weapon. Law enforcement may shoot you if they see you holding a weapon.
  - Secure the weapon by placing an empty trash can over it and sliding it to a location where it can be kept covered and under control until a law enforcement officer can take possession of it.





## Procedures for Preventing Acts of Bullying and Cyber-bullying Information

Insight Schools of California strives to provide a safe and welcoming environment for all students to learn. Harassment and bullying on the basis of actual or perceived characteristics including disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sex, sexual orientation, or association with a person or group with one or more of these actual or perceived characteristics is unlawful and will not be tolerated. No individual or group shall, through physical, written, verbal, or other means, harass, sexually harass, threaten, intimidate, retaliate, cyberbully, cause bodily injury to, or commit hate violence against any student or school personnel.

Cyberbullying includes the electronic creation or transmission of harassing communications, direct threats, or other harmful texts, sounds, or images as defined in Education Code 48900. Cyberbullying also includes breaking into another person's electronic account and assuming that person's identity in order to damage that person's or another's reputation.

- Harassment or bullying on the basis of sex includes sexual harassment or bullying and gender-based harassment or bullying. Sexual harassment or bullying is unwelcome conduct of a sexual nature, such as unwelcome sexual advances, requests for sexual favors, and other verbal, nonverbal, or physical conduct of a sexual nature. Gender-based harassment or bullying is nonsexual intimidation or abusive behavior toward a student based on the student's actual or perceived sex, including harassment based on gender identity, gender expression, and nonconformity with gender stereotypes. Harassing conduct may take many forms, including verbal acts and name-calling, as well as non-verbal behavior, such as graphic and written statements, or conduct that is physically threatening, harmful or humiliating. The conduct can be carried out by school employees, other students, and non-employee third parties. Both male and female students can be victims of harassment or bullying on the basis of sex, and the harasser or bully and the victim can be of the same sex. Bullying on the basis of sex constitutes sexual harassment.
- Harassment or bullying on the basis of race, color, or national origin refers to intimidation or abusive behavior toward a student based on actual or perceived race, color or national origin. Harassing conduct may take many forms, including verbal acts and name-calling, as well as non-verbal behavior, such as graphic and written statements, or conduct that is physically threatening, harmful or humiliating. The conduct can be carried out by school employees, other students, and non-employee third parties. Bullying on the basis of race, color, or national origin constitutes racial harassment.
- Harassment or bullying on the basis of disability refers to intimidation or abusive behavior toward a student based on actual or perceived disability. Harassing conduct may take many forms, including verbal acts and name-calling, as well as non-verbal behavior, such as graphic and written statements, or conduct that is physically threatening, harmful or humiliating. The conduct can be carried out by school employees, other students, and non-employee third parties. Bullying on the basis of disability constitutes disability harassment.



## Complaint and Reporting Procedure

Any student, employee, or agent who believes he or she has been harassed by an employee, agent, or student of the school should promptly report the facts of the incident(s) and the name of the individual(s) involved to the Academic Administrator (AA). If the alleged harasser is the AA, the person may report the incident to the Head of Schools. A written report of the alleged incident will be developed by the Head of Schools. A copy of the report, along with a copy of this policy, shall be mailed to the parent of the student who initiated the complaint.

All staff, upon personal knowledge of an incident of sexual harassment, are obligated to report it to the Director, or if the harasser is the Director, the report shall be made to the Head of Schools. Failure to do so is a violation of this policy. Failure of staff to report student allegations of sexual harassment within three (3) school days is a violation of this policy.

Students who feel aggrieved because of unwelcome conduct that may constitute sexual harassment are not required to inform the person engaging in such conduct that the conduct is unwanted, offensive and must stop, but are encouraged to do so. An aggrieved individual is not required to complain to his or her instructor if that instructor is the individual who is harassing the student. Any individuals making a report may bring an advocate to assist them.

### Filing Complaints with State and Federal Agencies

Aggrieved parties may wish to file complaints with other appropriate state and federal agencies, including:

U.S. Office for Civil Rights  
50 United Nations Plaza, Room 239,  
San Francisco, CA 94102  
(415) 556-7000

### Confidentiality

An allegation of sexual harassment and the results of the investigation shall be kept confidential to the extent reasonably possible under the investigative process. Witnesses and those interviewed shall be informed of the confidential nature of the issues and the investigation and shall be informed that it will be a violation of this policy to disclose the allegation or the nature of the investigation to others and shall be subject to disciplinary action as defined in this policy.

### Retaliation Is Prohibited

The initiation of an allegation of sexual harassment will neither cause any negative reflection on the individual reporting the incident or witnesses nor will it affect such persons' future business dealings with the school, his or her employment, compensation or work assignments, or, in the case of students, his/her grades, class section or other matters pertaining to his/her status as a student of any school programs. It shall be a violation of this policy to engage in such retaliation. An allegation of retaliation shall be considered as a separate incident, shall be investigated, and shall be subject to disciplinary action.

### Time Limits

Allegations of sexual harassment shall be reported by the complainant as soon as reasonably possible after the conduct in question has taken place. Students, employees, or agents of the school wishing to report allegations to additional agencies, such as the U.S. Office for Civil Rights, should know that this agency follows a 180-day time limit for reporting alleged incidents of sexual harassment.

### Disciplinary Action

When an allegation of sexual harassment is supported by the investigation and disciplinary action is necessary, the Head of School will determine what course of action is appropriate, depending upon whether the harasser is a student, staff member, or agent of the school.

Employees who violate this policy may be subject to discipline up to and including dismissal. Such disciplinary action shall be in accordance with applicable policies and laws. Students who violate this policy may be subject to discipline up to and including expulsion. Such disciplinary action shall be in accordance with board policy and state law. Agents of the school who violate this policy may be subject to penalties and sanctions as may be available to the school, including termination of business relationships and contracts or the privilege of volunteering on campus.

### Appeal Procedures

Either the complaining party or the accused may appeal the findings of an investigation to the Governing Board of the school.



Appeals shall be made in writing within ten (10) business days from the date of a finding.

#### Prevention Strategies

Insight Schools of California shall focus on the prevention of bullying and harassment by establishing clear rules for student conduct and implementing strategies to promote a positive, collaborative school climate. Students shall be informed, through student handbooks and other appropriate means, of district and school rules related to bullying, mechanisms available for reporting incidents or threats, and the consequences for engaging in bullying.

#### Training and Professional Development

As part of the school's commitment to bullying prevention, the Head of School or designee will develop training for teachers and other school staff to raise their awareness about the legal obligation of the school and its employees to prevent discrimination, harassment, intimidation, and bullying.

Such training shall be designed to provide staff with the skills to:

- Discuss the diversity of the student body and school community, including their varying immigration experiences
- Discuss bullying prevention strategies with students, and teach students to recognize the behavior and characteristics of bullying perpetrators and victims
- Identify the signs of bullying or harassing behavior
- Take immediate corrective action when bullying is observed
- Report incidents to the appropriate authorities, including law enforcement in instances of criminal behavior





## **Safety Plan Review, Evaluation and Amendment Procedures**

The plan is monitored by administration with discussion at staff and stakeholder meetings.





**Safety Plan Review, Evaluation and Amendment Procedures**

<b>Activity Description</b> (i.e. review steps, meetings conducted, approvals, etc)	<b>Date and Time</b>	<b>Attached Document</b> (description and location)
Administration and staff review	November 2024	Disaster Procedures updated to include outings for students, families, and staff to reflect Parent Student Handbook information.  School Suspensions and Expulsions was updated to include Education Codes 48900 and 48901 specific language.  The Safe Storage of Firearms SB906 letter to families was added as an attachment



## Emergency Response Guidelines

### Step One: Identify the Type of Emergency

Emergency Actions are a set of simple directives and alert level procedures that may be implemented across a number of emergency situations. When an emergency occurs, it is critical that staff members take immediate steps to protect themselves and others. With Emergency Actions in place, staff can follow specific directions without having to learn extensive protocols for each of several dozen different emergency situations. The Principal/Site Admin will decide which Emergency Actions to implement, based on the situation. The first response to an emergency is to determine the type of emergency that has occurred. Procedures for different types of emergencies are listed in the following section.

### Step Two: Identify the Level of Emergency

The second step in responding to an emergency is to determine the level of the emergency. For schools, emergency situations can range from a small fire to a major earthquake. To assist schools in classifying emergency situations, there is a three-tiered rating below:

Level 1 Emergency: A minor emergency that is handled by school personnel without the assistance from outside agencies, e.g., a minor earthquake, or a minor injury.

Level 2 Emergency: A moderate emergency that requires assistance from outside agencies, such as a fire or a moderate earthquake.

Level 3 Emergency: A major emergency event that requires assistance from outside agencies such as a major earthquake, civil disturbance or a large-scale act of terrorism. For Level 3 emergencies, it is important to remember that the response time of outside agencies may be seriously delayed.

### Step Three: Determine the Immediate Response Action

Once the type and extent of an emergency have been identified, school personnel can determine if an immediate response action is required. The most common immediate response actions initiated during emergencies are: Lockdown, Shelter in Place, Duck, Cover and Hold, and Evacuation.

LOCKDOWN is initiated to isolate students and staff from danger on or near the building when movement within the building and within rooms might put students and staff in jeopardy. LOCKDOWN is used to prevent intruders from entering occupied areas of the buildings.

- Lock the doors;
- Close and lock windows, and close blinds or cover windows;
- Turn off lights;
- Silence all electronic devices;
- Remain silent;
- Use strategies to silently communicate with first responders if possible,
- Hide along the wall closest to the exit but out of the view from the hallway (allowing for an ambush of the intruder and for possible escape if the intruder enters the room); and



Remain in place until the release from lockdown by school administration or evacuated by law enforcement.

SHELTER IN PLACE is implemented when there is a need to isolate students and staff from the outdoor environment to prevent exposure to airborne contaminants. The procedures include closing and sealing doors, windows and vents; shutting down the building heating, ventilation and air conditioning systems to prevent exposure to the outside air; and turning off pilot lights. SHELTER IN PLACE allows for the free movement of staff and students within the building, although one should not leave the room until further instructions are received. It is appropriate for, but not limited to, gas leaks, external chemical release, dirty bombs and hazardous material spills.

DUCK, COVER AND HOLD ON is the action taken during an earthquake to protect students and staff from flying and falling debris. DUCK, COVER AND HOLD ON is an appropriate action for use during an earthquake or explosion. Immediate EVACUATION and an emergency damage assessment must be performed prior to occupancy of the building, following any event prompting the use of DUCK, COVER AND HOLD ON.

EVACUATION is implemented when conditions make it unsafe to remain inside the building(s). This action provides for the orderly movement of students and staff along prescribed routes from inside the building to a designated outside area of safety.

ALL CLEAR: Notification is given that normal school operations should resume.

#### **Step Four: Communicate the Appropriate Response Action**

Academic Admin should use any means available to them to communicate with staff and inform them which response action to take.





## **Types of Emergencies & Specific Procedures**

### **Aircraft Crash**

Emergency response will depend on the size of the aircraft, nature of the crash, and proximity to the building. If it is safe to remain inside the building, all students should be kept inside under supervision. The crash may also result in an explosion, chemical spill or utility interruption.

#### **STAFF ACTIONS:**

Call 911

Notify Site Admin

Move students away from immediate vicinity of the crash.

EVACUATE students from the building using primary and/or alternate fire routes to a safe assembly area away from the crash scene.

Take class roster.

Check site to assure that all students have evacuated.

Take attendance at the assembly area.

Report missing students to the Site Admin and emergency response personnel.

Maintain control of the students a safe distance from the crash site.

Care for the injured, if any.

Escort students back to the to the site when emergency response officials have determined it is safe to return to the building

#### **SITE ADMINISTRATOR ACTIONS:**

Determine immediate response procedures, which may include EVACUATION, or OFF-SITE EVACUATION

Notify Head of Schools, who will contact the Office of Emergency Services.

Arrange for first aid treatment and removal of injured occupants from building.

Secure area to prevent unauthorized access until the Fire Department arrives. Ensure that students and staff remain at a safe distance from the crash.

Account for all building occupants and determine extent of injuries.

Do not re-enter building until the authorities provide clearance to do so.

### **Animal Disturbance**

If there is a rabid or uncontrollable animal at the location, implement this procedure when any wild animal threatens the safety of the students and staff

#### **ADMINISTRATOR ACTIONS:**

Isolate the students from the animal. Close doors and lock tables as a means to isolating the animal.

If the animal is outside, keep students inside and institute Lockdown.

If the animal is inside, initiate an EVACUATION outside to a protected area away from the animal

Call 9-1-1

If the animal injures anyone, seek medical assistance.

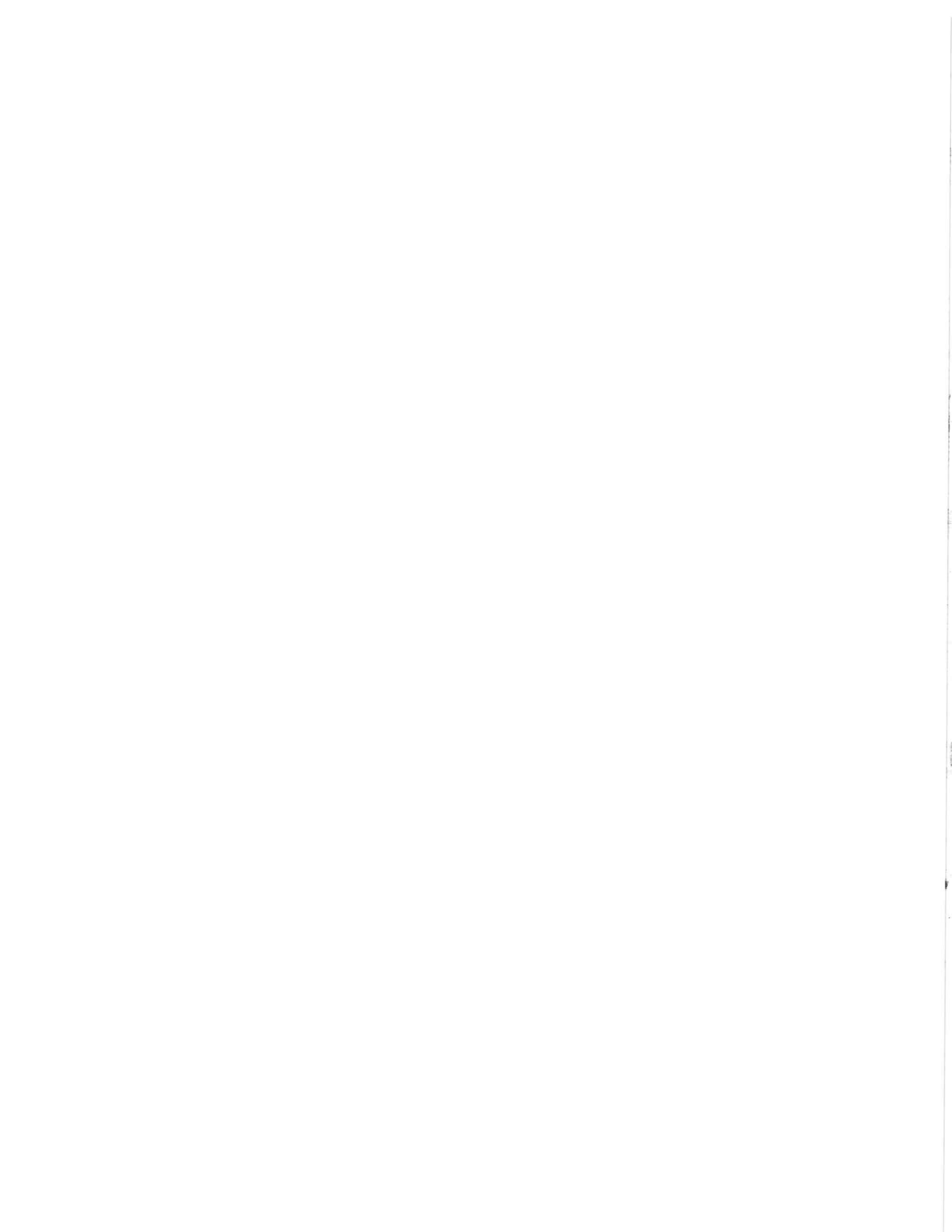
Notify parent/guardian and recommended health advisor.

#### **STAFF/TEACHER ACTIONS:**

If the animal is outside, keep students inside. Lock doors and keep students away from the windows.

If the animal is inside, EVACUATE students to a sheltered area away from the animal.

Notify the site admin if there are any injuries.



## Armed Assault on Campus

### Active Shooter / Armed Assailant Situations

“Active shooter situations” are defined as those where an individual or individuals is “actively engaged in killing or attempting to kill people in a confined and populated area.” Active shooters / armed assailants frequently use firearms but attacks of this type can also be made with other types of weapons (knives, swords, etc.). These situations are unpredictable and evolve quickly. Because of this, individuals must be prepared to deal with an active shooter / armed assailant situation before law enforcement personnel arrive on the scene.

No single response fits all active shooter / armed assailant situations; therefore it is essential all members of the school staff know their options for response and are prepared to act decisively to protect their students and themselves.

### ACTIONS – ALL SCHOOL STAFF

1. All employees are authorized to take immediate action to protect themselves and students if they see or hear anything that causes them to believe an active shooter / armed assailant situation is occurring or is to about to occur.
  - a. Act immediately if you or your students:
    - hear a sound that might be gunfire.
    - see something that looks like a weapon being carried or used on or near the campus.
    - sense any other indication of active shooter / armed assailant threat.
  - b. Quickly evaluate which option (Run, Hide or Fight) will best protect you and your students.
  - c. Be decisive. Communicate your plan to your students and act quickly.
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2. Options: Run, Hide or Fight
  - a. RUN: If you can get yourself and your students safely away from danger, do so immediately.
    - Do not evacuate unless you...
  - o know with certainty, the exact location of assailant (do not trust unofficial, second hand accounts),  
o and can visualize a route that will get your students and yourself safely off campus.
    - Don't carry anything with you.
  - o Police may mistake an item in your hands as a weapon.
  - o Leave everything behind.
    - If you encounter people along the way...
  - o Adults: Warn them and take them with if you can but don't stop if they refuse to come.
  - o Students: Warn any students you encounter and take them with if you. You may use reasonable force to take a student with you if you can do so without endangering yourself or the other students in your care.
    - Place terrain and buildings between you and the assailant to cover your escape.
    - Keep going until you are certain you are out of danger.
    - Call 911 as soon as it is safe to do so.
    - Keep your students with you.
  - b. HIDE: If you do not know the exact location of the assailant, get your students and yourself into the most secure location available and LOCKDOWN.
    - Lock the doors
    - Close and lock windows and close blinds or cover windows;
    - Turn off lights;
    - Barricade the doors with heavy furniture; be sure your barricade covers any glass in or near the door;
    - Silence all electronic devices;
    - Remain silent;
    - Position occupants spread out and out of line of site from room entrance.
    - Use text or email to communicate your location, the number of students or staff with you, if you have any wounded and the extent of the injuries;
    - Call 911 as soon as it is safe to do so.
    - Remain in place until evacuated by identifiable law enforcement officers.
  - c. FIGHT: Never seek out confrontation with an active shooter / armed assailant. If you are confronted by an active shooter / armed assailant and you have no safer option, take immediate action to disrupt or incapacitate the assailant. If you choose the FIGHT option, commit to your actions.





- If you are in LOCKDOWN (Hide), prepare yourself and your students for the possibility that the assailant may attempt to get in the room you are in.
  - o Construct a strong barricade.
    - o If you have another way out (a window or back door) use it while the assailant is attempting to get in.
    - o If no other exit is available be prepared to disrupt the assailant by throwing objects at the assailant and running for the exit as soon as the assailant enters the room.
    - o Use items in the environment as improvised weapons (fire extinguishers, staplers, books, cups, etc.)
      - Staff members may consider using aggressive and violent force to surprise and overwhelm the assailant.
3. Call 911 and initiate a LOCKDOWN announcement as soon as you can do so safely. Work with the people you are with to do both calls simultaneously if possible.
- a. Provide as much information as possible (slow down – be calm):
- State the emergency: “I hear gunfire.” “I saw...”
- o Give information on people who are wounded.
- Location of the assailant (if known):
  - Description of the assailant (if known):
  - Your precise location: “room \_\_\_”
  - The number of children with you:
- b. Keep the line open, even if you can’t talk, unless instructed by the dispatcher to end the call.

4. Special Topics

a. Injuries: Your response to injured persons will need to vary given the specific circumstances that are present and the response option (Run, Hide or Fight) you are engaged in.

- Run – If you encounter injured persons while you are trying to get out of danger and you have children with you, you must place their safety ahead of the injured person. Take note of where the injured person is and report the location as soon as you get to safety.
- Hide – If someone is injured where you are hiding, secure the room before tending to the wounded. As soon as it is safe to do so, apply first aid using any supplies that are available. If necessary, use articles of clothing as improvised dressing for wounds and apply direct pressure to control bleeding.
- Fight – This is always the option of last resort because the probability of injury is highest when you are in close proximity to the assailant. Commit to your plan. Do not stop to tend to the wounded until it is safe to do so.

o If you’re intention is to disrupt the assailant to allow as many people to escape as possible, stick to that plan.

o If your plan is to incapacitate the assailant, keep fighting until the assailant is incapacitated and the weapon and assailant are under control.

b. Law Enforcement: If you encounter law enforcement officers...

- Immediately raise your hands in the air and display your open palms.
- Don’t run up to officers or attempt to hug or talk to them.
- Don’t talk unless they ask you a question.
- Do exactly what they tell you to do.

c. Weapons: If the assailant loses control of a weapon, exercise extreme care when securing it:

- Do not pick up the weapon. Law enforcement may shoot you if they see you holding a weapon.
- Secure the weapon by placing an empty trash can over it and sliding it to a location where it can be kept covered and under control until a law enforcement officer can take possession of it.

**Biological or Chemical Release**

This is an incident involving the discharge of a biological substance in a solid, liquid or gaseous state. Such incidents may include the release of radioactive materials. A biological agent can be introduced through:

- postal mail, via a contaminated letter or package
- a building’s ventilation system
- a small explosive device to help it become airborne
- a contaminated item such as a backpack, book bag, or other parcel left unattended
- the food supply



- aerosol release (for example, with a crop duster or spray equipment)

Defense against biological release (e.g. anthrax, smallpox, plague, ricin etc.) is difficult because usually appear after some time has lapsed. Indicators that may suggest the release of a biological or chemical substance include multiple victims suffering from: watery eyes, choking or breathing difficulty, twitching or the loss of coordination. Another indicator is the presence of distressed animals or dead birds. Determine which scenario applies and implement the appropriate response procedures.

#### Outside the building

##### STAFF ACTIONS:

Notify site admin

Move students away from immediate vicinity of danger (if outside, implement Take Cover).

Segregate individuals who have been topically contaminated by a liquid from unaffected individuals. Send affected individuals to a designated area medical attention.

Follow standard student assembly, accounting and reporting procedures.

##### ADMINISTRATOR ACTIONS:

Initiate SHELTER IN PLACE.

Shut off HVAC units.

Move to central location where windows and doors can be sealed with duct tape.

Call 911. Provide location and nature of the emergency and school actions taken.

Notify Head of Schools of the situation.

Turn on a battery-powered commercial radio and listen for instructions.

Remain inside the building until the Department of Health or Fire Department determines it is safe to leave.

Arrange for psychological counseling for students and staff.

#### Inside the building

##### STAFF ACTIONS:

Notify site administrator.

Segregate individuals who have been topically contaminated by a liquid from unaffected individuals.

Implement EVACUATION as appropriate. Send affected individuals to a designated area for medical attention.

Follow standard student assembly, accounting and reporting procedures.

Prepare a list of those who are in the affected area to provide to emergency response personnel.

##### ADMINISTRATOR ACTIONS:

Initiate EVACUATION to move students away from immediate vicinity of danger.

Move up-wind from the potential danger.

Call 911. Provide exact location and nature of emergency.

Designate security team to isolate and restrict access to potentially contaminated areas.

Wait for instructions from emergency responders-- Health or Fire Department.

Notify Director of the situation.

Arrange for immediate psychological counseling for students and staff.

Wait to return to the building until it has been declared safe by local HazMat or appropriate agency.

#### THOSE WHO HAVE DIRECT CONTACT WITH BIOLOGICAL AGENT:

Wash affected areas with soap and water.

Immediately remove and contain contaminated clothing

Do not use bleach on potentially exposed skins.

Remain in safe, but separate area, isolated from those who are unaffected, until emergency response personnel arrive.

#### **Bomb Threat/ Threat Of violence**

In the event that the site receives a bomb threat by telephone, follow the Bomb Threat Checklist (attachment) to document information about the threat. Keep the caller on the telephone as long as possible and listen carefully to all information the caller provides.





#### PERSON RECEIVING THREAT BY TELEPHONE:

Listen. Do not interrupt caller.

Keep the caller on the line with statements such as "I am sorry, I did not understand you. What did you say?"

Alert someone else by prearranged signal to notify the telephone company to trace the call while the caller is on the line.

Notify site administrator immediately after completing the call.

Complete the Bomb Threat Checklist.

#### PERSON RECEIVING THREAT BY MAIL:

Note the manner in which the threat was delivered, where it was found and who found it.

Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.

Caution students against picking up or touching any strange objects or packages.

Notify site administrator.

#### ADMINISTRATOR ACTIONS:

Call 911.

If the caller is still on the phone, contact the phone company to trace the call. Tell the telephone operator the name of building, name of caller, phone number on which the bomb threat came in. This must be done quickly since the call cannot be traced once the caller has hung up.

Instruct staff and students to turn off any pagers, cellular phones or two-way radios. Do not use those devices during this threat since explosive devices can be triggered by radio frequencies.

Determine whether to evacuate the threatened building and adjoining buildings. If the suspected bomb is in a corridor, modify evacuation routes to bypass the corridor.

Use the intercom, personal notification by designated persons, or the PA system to evacuate the threatened rooms.

If it is necessary to evacuate the entire building, use the fire alarm.

Notify the Head of Schools of the situation.

Direct a search team to look for suspicious packages, boxes or foreign objects.

Do not return to the building until it has been inspected and determined safe by proper authorities.

Avoid publicizing the threat any more than necessary.

#### SEARCH TEAM ACTIONS:

Use a systematic, rapid and thorough approach to search the building and surrounding areas.

Check rooms, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).

If suspicious item is found, make no attempt to investigate or examine object.

#### STAFF ACTIONS:

Evacuate students as quickly as possible, using primary or alternate routes.

Upon arrival at the designated safe site, take attendance. Notify the site administrator of any missing students.

Do not return to the building until emergency response officials determine it is safe.

#### **Disorderly Conduct**

A risk to the life and safety of students and staff may exist there is a serious display of disordered thought or behavior. Possible symptoms include: hallucinations, extreme paranoia, impaired judgment that may lead to unsafe decision-making and dangerous behavior (to self or others), incoherent or disjointed speech and self-injurious behavior such as: hitting head, cutting self. Attempts should be made to use de-escalation strategies, calming techniques (e.g., deep breathing), and to implement behavior plans, crisis plans or strategies in IEP, if in place.

#### ADMINISTRATOR ACTIONS:

Keep the individual under continuous adult supervision.

Keep the individual on campus until parent/guardian has been notified.

Arrange appropriate support services for necessary care of individual.



If the individual actively displays dangerous behavior or there is reason to believe the student cannot be safely transported, call agencies as appropriate to coordinate emergency mental health services (e.g., mental health facilities, juvenile court, law enforcement).

School professional (psychologist, counselor, social worker, nurse) should recommend next steps to the Admin. The next steps may include:

Provide parents/guardian with the names and phone numbers of mental health resources

Recommend that the parents make an immediate contact with a therapist.

Request that parents/guardian to sign release forms to allow two-way communication between the school and the treating agency.

Make a follow-up check with the treating agency, family and student as appropriate, to ensure that appropriate care has been arranged.

Provide follow-up collaborative support for the student and parents (as indicated)

Document actions taken on behalf of the student (referrals, phone contacts, follow-up activities, etc.)

#### STAFF ACTIONS:

Take immediate action to isolate the individual and provide safety to the student body. Do not leave the irrational individual alone.

Notify site administrator.

Notify school psychologist, counselor or social worker.

Protect individual from injury.

### Earthquake

Earthquakes strike without warning. Fire alarms or sprinkler systems may be activated by the shaking. The effect of an earthquake from one building to another will vary. Elevators and stairways will need to be inspected for damage before they can be used. The major shock is usually followed by numerous aftershocks, which may last for weeks.

The major threat of injury during an earthquake is from falling objects, glass shards and debris. Many injuries are sustained while entering or leaving buildings. Therefore, it is important to quickly move away from windows, free-standing partitions and shelves and take the best available cover under a sturdy desk or table, in a doorway or against an inside wall. All other actions must wait until the shaking stops. If persons are protected from falling objects, the rolling motion of the earth may be frightening but not necessarily dangerous.

#### Inside Building

##### ADMINISTRATOR ACTIONS:

Direct inspection and assessment of buildings. Report building damage and suspected breaks in utility lines or pipes to fire department responders.

Send search and rescue team to look for trapped students and staff.

Post guards a safe distance away from building entrances to assure no one re-enters.

Notify Head of Schools of school and personnel status. Determine who will inform public information media as appropriate.

Do NOT re-enter building until it is determined to be safe by appropriate facilities inspector.

Determine whether to close the site. If the site must be closed, notify staff members, students and parents.

##### STAFF ACTIONS:

Give DROP, COVER and HOLD ON command. Instruct students to move away from windows, bookshelves and heavy suspended light fixtures. Get under table or other sturdy furniture with back to windows.

Check for injuries, and render First Aid.

After shaking stops, EVACUATE building. Avoid evacuation routes with heavy architectural ornaments over the entrances. Do not return to the building. Bring attendance roster and emergency backpack.

Check attendance at the assembly area. Report any missing students to site administrator.

Warn students to avoid touching electrical wires and keep a safe distance from any downed power lines.

Stay alert for aftershocks

Do NOT re-enter building until it is determined to be safe.

#### Outside Building

##### STAFF ACTIONS:





Move students away from buildings, trees, overhead wires, and poles. Get under table or other sturdy furniture with back to windows. If not near any furniture, drop to knees, clasp both hands behind neck, bury face in arms, make body as small as possible, close eyes, and cover ears with forearms. If notebooks or jackets are handy, hold over head for added protection. Maintain position until shaking stops.

After shaking stops, check for injuries, and render first aid.

Check attendance. Report any missing students to site administrator.

Stay alert for aftershocks.

Keep a safe distance from any downed power lines

Do NOT re-enter building until it is determined to be safe.

Follow instructions of site administrator.

### **Explosion or Risk Of Explosion**

Emergency response will depend on the type of explosion (smoke bomb, chemical lab incident, etc.) and proximity to the building.

All students should be kept away from the explosion and under supervision.

#### **SITE ADMINISTRATOR:**

Determine whether site evacuation should be implemented. If so, sound fire alarm. This will automatically implement action to EVACUATE the building. EVACUATION may be warranted in some buildings but others may be used for SHELTER IN PLACE.

Notify Fire Department (call 911). Provide building name, address, exact location within the building, your name and phone number and nature of the emergency.

Secure area to prevent unauthorized access until the Fire Department arrives.

Advise the Head of Schools of status.

Notify emergency response personnel of any missing students.

Notify utility company of breaks or suspected breaks in utility lines or pipes. Provide building name, address, location within building, your name and phone.

Direct a systematic, rapid and thorough approach to search the building and surrounding areas. Check classrooms and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubby, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).

Determine if Student Release should be implemented. If so, notify staff, students and parents.

If damage requires the site to be closed, notify parents and staff of status. Do not return to the building until it has been inspected and determined safe by proper authorities.

#### **STAFF ACTIONS:**

Initiate DROP, COVER AND HOLD ON.

If explosion occurred inside the building, EVACUATE to outdoor assembly area. Keep students and staff at a safe distance from the building(s) and away from fire-fighting equipment.

Check to be sure all students have left the site. Remain with students throughout evacuation process.

Upon arrival at assembly area, check attendance. Report status to site administrator immediately.

Render first aid as necessary.

Do not return to the building until the emergency response personnel determine it is safe to do so.

If explosion occurred in the surrounding area, initiate SHELTER IN PLACE. Keep students at a safe distance from site of the explosion.

### **Fire in Surrounding Area**

A fire in an adjoining area, such as a wild land fire, can threaten the building and endanger the students and staff. Response actions are determined by location and size of the fire, its proximity to the building and the likelihood that it may endanger the building.

#### **ADMINISTRATOR ACTIONS:**

Determine if EVACUATION of site is necessary.

Contact local fire department (call 911) to determine the correct action for your site.

If necessary, begin evacuation of site to a safe site using site evacuation plan.

Direct inspection of premises to assure that all students and personnel have left the building.

Notify the Head of Schools where the site has relocated and post a notice on the office door stating the temporary new location.

Monitor radio station for information.

Do not return to the building until it has been inspected and determined safe by proper authorities.





**STAFF ACTIONS:**

If students are to be evacuated, take attendance to be sure all students are present before leaving the building site.  
Stay calm. Maintain control of the students a safe distance from the fire and firefighting equipment.  
Take attendance at the assembly area. Report any missing students to the site administrator and emergency response personnel.  
Remain with students until the building has been inspected and it has been determined safe to return to.

**Fire on School Grounds**

Should any fire endanger the students or staff, it is important to act quickly and decisively to prevent injuries and contain the spread of the fire. All doors leading to the fire should be closed. Do not re-enter the area for belongings. If the area is full of smoke, students and employees should be instructed to crawl along the floor, close to walls, which will make breathing easier and provide direction. Before opening any door, place a hand an inch from the door near the top to see if it is hot. Be prepared to close the door quickly at the first sign of fire. All fires, regardless of their size, which are extinguished by staff, require a call to the Fire Department to indicate that the "fire is out".

**Within Building**

**ADMINISTRATOR ACTIONS:**

Sound the fire alarm to implement EVACUATION of the building.  
Immediately EVACUATE the site using the primary or alternate fire routes.  
Notify the Fire Department (call 911).  
Direct search and rescue team to be sure all students and personnel have left the building.  
Ensure that access roads are kept open for emergency vehicles.  
Notify District Office of situation.  
Notify appropriate utility company of suspected breaks in utility lines or pipes.  
If needed, notify bus dispatch for OFF-SITE EVACUATION.  
Do not allow staff and students to return to the building until the Fire Department declares that it is safe to do so.

**STAFF ACTIONS:**

EVACUATE students from the building using primary or alternate fire routes Take emergency backpack and student kits. Maintain control of the students a safe distance from the fire and firefighting equipment.  
Take attendance. Report missing students to the site admin and emergency response personnel.  
Maintain supervision of students until the Fire Department determines it is safe to return to the building.

**Near the Site**

**ADMINISTRATOR ACTIONS:**

Notify the Fire Department (call 911). The Fire Marshall will direct operations once on site.  
Determine the need to implement an EVACUATION. If the fire threatens the site, execute the actions above. If not, continue with the routine.

**Flooding**

Flooding could threaten the safety of students and staff whenever storm water or other sources of water threaten to inundate grounds or buildings. Flooding may occur if a water pipe breaks or prolonged rainfall causes urban streams to rise. Flooding may also occur as a result of damage to water distribution systems such as failure of a dam or levee. If weather-related, an alert message will be broadcast over the weather radio station.

**ADMINISTRATOR ACTIONS:**

Issue STAND BY instruction. Determine if evacuation is required.  
Notify local police department of intent to EVACUATE, the location of the safe evacuation site and the route to be taken to that site.  
Delegate a search team to assure that all students have been evacuated.  
Monitor AM radio weather station for flood information.  
Notify Head of Schools of site status and action taken.  
Do not allow staff and students to return to the building until proper authorities have determined that it is safe to do so.



**STAFF ACTIONS:**

If warranted, EVACUATE students using evacuation plan. Take the class roster and emergency backpack. Take attendance before leaving the campus.

Remain with students throughout the evacuation process.

Upon arrival at the safe site, take attendance. Report any missing students to site administrator and emergency response personnel.

Do not return to the building until it has been inspected and determined safe by property authorities.

**Loss or Failure Of Utilities**

Failure of any of the utilities (electricity, gas, water) constitutes a condition that must be dealt with on a situational basis. Advance notice may be received from a utility company regarding loss of service. In many cases, such loss of service will be of short duration and require no special action other than notifying staff of the temporary interruption of service.

**ADMINISTRATOR:**

Notify the site owner. Provide the following information:

Affected areas of the site

Type of problem or outage

Determine length of time service will be interrupted.

Determine desired action, which may include students going home and notification of parents.

If disruption in service will severely hamper school operation, notify students and staff by appropriate means.

Use messengers with oral or written word as an alternate means of faculty notification.

Notify Director of loss of service.

**Motor Vehicle Crash**

A motor vehicle crash may result in a fuel or chemical spill at the site. If the crash results in a utility interruption, refer to the section on Utility Failure.

**ADMINISTRATOR ACTIONS:**

Notify police and fire department (call 911).

Determine immediate response procedures, which may include EVACUATION.

Arrange for first aid treatment and removal of injured occupants from building.

Secure area to prevent unauthorized access until the public safety officials (police, sheriff, fire department) arrive.

Ensure that students and staff remain at a safe distance from the crash.

Account for all building occupants and determine extent of injuries.

Notify the Head of Schools.

**STAFF ACTIONS:**

Notify Site Admin

Move students away from immediate vicinity of the crash.

EVACUATE students to a safe assembly area away from the crash scene. Take class roster/nametags and emergency backpack.

Check site to assure that all students have evacuated.

Take attendance at the assembly area.

Report missing students to the Site Admin and emergency response personnel.

Maintain control of the students a safe distance from the crash site.

Care for the injured, if any.

Escort students back to the site when emergency response officials have determined it is safe to return to the building.

**Pandemic**

Influenza is a highly contagious viral disease. Pandemic influenza differs from both seasonal influenza (flu) and avian influenza in the following aspects:

It is a rare global outbreak which can affect populations around the world.

It is caused by a new influenza virus to which people do not have immunity.

Depending upon the specific virus, it can cause more severe illness than regular flu and can affect young healthy people more so than older, sick people.





The Department of Health and Human Services will take the lead in mobilizing a local response to pandemic influenza. Public health alerts will be reported to schools and the community. Individual schools may be closed temporarily to contain spread of the virus.

#### ADMINISTRATOR ACTIONS:

- Activate heightened surveillance of illness within site. Gather data on symptoms of students and staff who are sick at home.
- Insure that students and staff members who are ill stay home.
- Send sick students and staff home from the site immediately.
- Provide fact sheets and guidelines for families to make them aware of symptoms and remind them of respiratory hygiene etiquette
- Monitor bulletins and alerts from the Department of Health and Human Services.
- Keep staff informed of developing issues.
- Assist the Department of Health and Human Services in monitoring outbreaks.
- Respond to media inquiries regarding attendance status.
- Implement online education, if necessary, so that students can stay home.
- Maintain surveillance after the initial epidemic in the event a second wave passes through the community.

#### STAFF and STUDENT ACTIONS:

- Stay home when ill with cough or other flu-like symptoms (chills, fever, muscle aches, sore throat).
- Practice "respiratory hygiene etiquette".
- Disinfect surfaces contaminated with infected respiratory secretions with a diluted bleach solution (1 part bleach to 100 parts water).
- Implement online homework assignments so that students can stay home.

### Psychological Trauma

#### SUICIDE & MELANIE'S LAW

##### Intervention, Screening, Referral

##### Action Plan for Suicide Attempts During-School Hours

If a suicide attempt is made during the school day, it is important to remember that the health and safety of the student and those around him/her is critical. The following steps should be implemented.

Follow Safety Risk Process, and remember the following:

- Remain calm, remember the student is overwhelmed, confused, and emotionally distressed;
- Call 911 and provide as much information about student as possible, including location/address of student;
- Move all other students out of the immediate area (when in-person for outing or testing) or remove from online classroom;
- Please follow Safety Risk Process for documentation, communication processes and follow-up.

##### Action Plan for After Hours Suicide Attempts

If a suicide attempt by a student is after hours, it is crucial that the school protects the privacy of the student and maintain a confidential record of the actions taken to intervene, support, and protect the student. The following steps should be implemented:

- Contact the parents/guardians/caregivers and offer support to the family;
- Discuss with the family how they would like the school to respond to the attempt;
- Obtain permission from the parents/guardians to share information with staff;

Students shall be encouraged to notify a staff member when they are experiencing emotional distress or suicidal ideation, or when they suspect or have knowledge of another student's emotional distress, suicidal ideation, or attempt.

Board approved Suicide Prevention and Postvention Policy is attached.

##### Action Plan for Opioid Overdose During-School Hours

If a staff member becomes aware of a student overdose during school hours, the following steps should be implemented:

Follow Safety Risk Process, and remember the following:

- Remain calm
- Call 911 and provide as much information about student as possible, including location/address of student;
- Move all other students out of the immediate area (when in-person for outing or testing) or remove from online classroom;



- Please follow Safety Risk Process for documentation, communication processes and follow-up.

#### SAFETY RISK PROCESS

A safety risk referral is to be completed if any teacher or staff member is a concerned student is in immediate risk of harming themselves or someone else. All concerns must be taken extremely seriously. If there is a concern, do NOT assume that the student's comment (either verbally, in an email and/or in a writing assignment) is only an attention getter or over dramatization. If you see any indication of inappropriate comments, you must follow proper procedure.

Reasonable suspicion of a student's intent to harm him or herself or someone else, includes the following.

- Staff eye witness of person or behavior
- Student's verbal statements
- Student's written statements to include things written in/on their assignments

#### Process

Staff/teacher is concerned about immediate risk of harm to a student or someone else

- Immediately call the local authorities or 911. Make sure you know the physical location of the student.
- Complete the Safety Risk Referral form (See Attachments)
- Contact your student's assigned Regional School Psychologist
- Include your Principal in the referral email as well as all follow-up and outcome information.
- Keep documentation of any conversations that you have with the student.
- Also, keep any emails or writing assignments that are cause for concern.

After the necessary steps have been followed, contact regional school psychologist with the pertinent information below:

- Student ID
- Reporting party name (whomever made the call)
- Numbers of any agencies and persons called to include the phone number
- Action taken (welfare check, etc.)
- Report # if welfare check was done
- Include your Principal in the referral email as well as all follow-up and outcome information.

The Regional School Psychologist will then complete a Safety Risk Report and follow up with authorities/family as appropriate. They will update any staff members and any necessary information with the school office.

#### SAFETY RISK PROCESS LIVE CLASS CRISIS

If a student is in immediate harm or someone in their home is in immediate harm during a live class session, follow the steps as outlined to call the local authorities and clear all of the other students from the virtual class environment immediately.

These steps should be followed during a Live Class Crisis Event:

1. Immediately call the local authorities
2. Remove all students from the online classroom
3. Complete the online Safety Risk Referral form
4. Contact your student's assigned Regional School Psychologist
5. Include your Principal in the referral email as well as all follow-up and outcome information

Please review and follow disciplinary code of conduct as outlined in Parent Student Handbook as needed. Refer to FERPA policy for any implications to student records.

#### STUDENT DEATH

A student's death may be the result of a suicide, homicide, car accident, illness or other causes. It may have a profound effect on the school and may be one of the most difficult situations an administrator will face. A communications strategy developed in advance of such tragedy will help the administrator know what to say to the student's family and the school community.

Principal/Site Administrator Actions:

Call 911 (If death happened at site)





Verify the death and obtain as much information about it as possible.

Contact the student's family or visit the home to offer condolence and support. Obtain information about the funeral/memorial service. Respect their wishes.

Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.

Notify teachers prior to notification of students.

Meet with front line staff/crisis team as soon as possible so that everyone understands the response plan.

Determine whether additional resources are needed and make appropriate requests.

Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for students and staff who want or need counseling support and assistance.

Develop a plan for notifying other students and sharing information about availability of support services.

Prepare a parent/guardian information letter and distribute it to students at the end of the day.

Contact parents of those students who are affected by the crisis to determine appropriate support needed. Offer assistance to parents of impacted students. If necessary, designate areas for crisis team/community resource persons to meet with affected students.

Meet with your staff/crisis team to evaluate the response and determine what additional resources might be needed.

#### Staff Actions:

Allow students who wish to meet with a counselor.

Encourage students to report any other students who might need assistance.

#### STAFF MEMBER DEATH

A staff member's reported death or serious illness among the school community may have a profound affect on students and staff alike.

#### Principal/Site Administrator Actions:

Verify the death and obtain as much information about it as possible.

Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.

Notify teachers prior to notification of students.

Contact the decedent's family to offer condolence and support. Obtain information about the funeral/memorial service. Respect the wishes of the family.

Meet with front line staff/crisis team as soon as possible so that everyone understands the response plan.

Determine whether additional resources are needed and make appropriate requests.

Develop a plan for notifying students and sharing information about availability of support services.

Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for staff who want or need support and assistance.

Facilitate a small group discussions for students.

Prepare a parent/guardian information letter.

Continue to monitor staff and students for additional supportive needs.

#### Suspected Contamination of Food or Water

This procedure applies if there is evidence of tampering with food packaging, observation of suspicious individuals in proximity to food or water supplies or suspicion of possible food/water contamination. Indicators of contamination may include unusual odor, color and/or taste or multiple individuals with unexplained nausea, vomiting or other illnesses.

#### ADMINISTRATOR ACTIONS:

Call 911.

Isolate suspected contaminated food/water to prevent consumption. Restrict access to the area.

Maintain a log of affected students and staff and their systems, the food/water suspected to be contaminated, the quantity and character of products consumed and other pertinent information.

Provide list of potentially affected students and staff to responding authorities.

Provide staff with information on possible poisonous materials in the building.

Notify the Head of Schools of situation and number of students and staff affected.

Confer with Department of Health and Human Services before the resumption of normal activities.

Prepare communication for families advising them of situation and actions taken.



**STAFF ACTIONS:**

- Notify site administrator.
- Call the Poison Center Hotline 1-800-222-1222.
- Administer first aid as directed by poison information center.
- Seek additional medical attention as needed.

**Tactical Responses to Criminal Incidents**

**Weapon Found on Property**

- Don't handle unless necessary. The weapon is evidence.
- If necessary, handle with care. Always wear rubber gloves or use a cloth to touch.
- Have a staff member stay with the weapon.
- Notify HOS/designee.
- HOS/designee should call 9-1-1.
- Cover the weapon from view of the public (cloth, wastebasket, etc.).
- Close off traffic from the area of the weapon.
- HOS/designee should assign someone to meet police to lead to weapon location.
- If there is a need to handle the media, contact K12's PR.
- HOS/designee will complete an incident report.

**Weapon Suspected on Student**

- Possession of a weapon on the property is a crime and is best handled by law enforcement personnel.
- The safety of students and staff is always first. Apprehension of violators and weapon retrieval is second.
- Treat all weapon related information (rumors) to be accurate and plan appropriately.
- Do not put anyone in harm's way. When faced with a suspected weapon on a person, school personnel should consider the following circumstances:
  - Type of weapon
  - Age of suspect
  - Age of suspect
  - Mental state of suspect
  - Victim risk factor
  - History of suspect, if known
  - Suspected location of weapon (on person or elsewhere)

**ACTION**

- Notify HOS/designee.
- HOS/designee will call 9-1-1.
- Don't attempt to stop suspect if flight from building is attempted.
- Attempt, in a non-confrontational way, to get suspect to a private office near an exit.
- Allow non-essential persons to flee from area.
- Do not allow access to book bags, backpacks without first checking contents.
- Avoid confrontation.

**FOLLOW-UP**

- HOS/designee will complete an incident report.
- If there is a need to handle the media, contact K12's PR.

**Rape/Suspected Rape**

- Get the victim to a private office free from any disruptions.
- Do not leave the victim alone.



Notify the HOS/designee.

Do not attempt to interview the victim, however, make note of any statements made by the victim.

Do not allow victim to remove any items of clothing. If victim has removed clothing, bag each piece in its own paper bag using latex gloves.

HOS/designee will contact call 9-1-1.

Get permission from police if the school is to contact parents.

If there is a need to handle the media, contact K12's PR group.

HOS/designee will assure a written account of the school's actions is on file.

## Missing Child

Notify HOS/designee immediately.

Follow lockdown procedure.

HOS/designee will notify police with the following information:

child's name

address

physical and clothing description

medical status, if appropriate

time last seen

HOS/designee will notify parents/legal guardian of missing child and inform of steps taken.

HOS/designee will complete incident report.

## Kidnapping

Notify HOS/designee immediately.

HOS/designee will call 9-1-1 immediately.

Give police information

Name, gender, age, address, dress, general physical description

Any suspect info, vehicle info, direction of travel

Secure all outside doors.

HOS/designee will notify emergency contact or parent/legal guardian if a minor.

Have information including picture, if possible, available to the police upon their arrival.

HOS/designee will complete incident report.

If there is a need to handle the media, contact K12's PR group.

## Unlawful Demonstration or Walkout

When an advance notice of a planned protest is given, inform the staff of the planned demonstration. An information letter to parents should be developed.

### ADMINISTRATOR ACTIONS:

Obtain information on when, why and how many people are expected. Identify the spokesperson for the group

Contact local police department and advise them of the situation.

Notify staff of the planned demonstration.

Develop an information letter to parents.

Assign a staff member to act as liaison with police, media and, possibly the demonstrating group.

Designate a staff member to handle incoming calls during the demonstration.

Establish areas where demonstrators can set up without affecting the operation of the site

### STAFF ACTIONS:

Do not allow students to be interviewed by the media or join in the demonstration

A civil disturbance is an unauthorized assemblage on the building grounds with the potential to:





disrupt school activities;  
cause injury to staff and students; and/or  
damage property.

Precautionary measures must be taken to keep school personnel and students from undue exposure to danger. Efforts should be made to remain calm, to avoid provoking aggression, and to keep students in rooms.

#### Inside Building

##### STAFF ACTIONS:

Report disruptive circumstances to site administrator.

Avoid arguing with participant(s).

Have all students and employees leave the immediate area of disturbance.

Lock doors. Account for all students and remain in classroom unless instructed otherwise by the admin or law enforcement.

Stay away from windows and exterior doors.

##### ADMINISTRATOR ACTIONS:

If the students are engaging in civil disobedience, keep the students confined to one room in the building.

Set up a communication exchange with the students, staff and admin. Try to restore order.

If unable to calm students and violent or uncontrolled behavior is probably, notify police of situation and request assistance.

Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

#### Outside of the Building

##### ADMINISTRATOR ACTIONS:

Call 911.

Move any students who are outside into the building. If unable to do so, have students lie down and cover their heads.

Once students are in the building, lock and secure all exterior doors, including restrooms.

Maintain an accurate record of events, conversations and actions.

##### STAFF ACTIONS:

Close and lock room doors. Close all curtains and blinds. Keep students away from windows and take precautions to protect them from flying glass in the event windows are broken.

Instruct students to DUCK AND COVER, lie on the floor and keep students calm.

Care for the injured, if any.

Remain with students within locked rooms until all clear is given.



# BOMB THREAT PROCEDURES

This quick reference checklist is designed to help employees and decision makers of commercial facilities, schools, etc. respond to a bomb threat in an orderly and controlled manner with the first responders and other stakeholders.

Most bomb threats are received by phone. Bomb threats are serious until proven otherwise. Act quickly, but remain calm and obtain information with the checklist on the reverse of this card.

If a bomb threat is received by phone:

1. Remain calm. Keep the caller on the line for as long as possible. DO NOT HANG UP, even if the caller does.
2. Listen carefully. Be polite and show interest.
3. Try to keep the caller talking to learn more information.
4. If possible, write a note to a colleague to call the authorities or, as soon as the caller hangs up, immediately notify them yourself.
5. If your phone has a display, copy the number and/or letters on the window display.
6. Complete the Bomb Threat Checklist immediately. Write down as much detail as you can remember. Try to get exact words.
7. Immediately upon termination of call, DO NOT HANG UP, but from a different phone, contact authorities immediately with information and await instructions.

If a bomb threat is received by handwritten note:

- Call \_\_\_\_\_
- Handle note as minimally as possible.

If a bomb threat is received by e-mail:

- Call \_\_\_\_\_
- Do not delete the message.

Signs of a suspicious package:

- No return address
- Excessive postage
- Stains
- Strange odor
- Strange sounds
- Unexpected delivery
- Poorly handwritten
- Misspelled words
- Incorrect titles
- Foreign postage
- Restrictive notes

\* Refer to your local bomb threat emergency response plan for evacuation criteria

## DO NOT:

- Use two-way radios or cellular phone. Radio signals have the potential to detonate a bomb.
- Touch or move a suspicious package.

## WHO TO CONTACT (Select One)

- 911
- Follow your local guidelines

For more information about this form contact the Office for Bombing Prevention at: [OBP@cisa.dhs.gov](mailto:OBP@cisa.dhs.gov)



# BOMB THREAT CHECKLIST

DATE:

TIME:

TIME CALLER HUNG UP:

PHONE NUMBER WHERE CALL RECEIVED:

## Ask Caller:

- Where is the bomb located? (building, floor, room, etc.) \_\_\_\_\_
- When will it go off? \_\_\_\_\_
- What does it look like? \_\_\_\_\_
- What kind of bomb is it? \_\_\_\_\_
- What will make it explode? \_\_\_\_\_
- Did you place the bomb? Yes No \_\_\_\_\_
- Why? \_\_\_\_\_
- What is your name? \_\_\_\_\_

## Exact Words of Threat:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Information About Caller:

- Where is the caller located? (background/level of noise) \_\_\_\_\_
- Estimated age: \_\_\_\_\_
- Is voice familiar? If so, who does it sound like? \_\_\_\_\_
- Other points: \_\_\_\_\_

Caller's Voice	Background Sounds	Threat Language
<input type="checkbox"/> Female	<input type="checkbox"/> Animal noises	<input type="checkbox"/> Incoherent
<input type="checkbox"/> Male	<input type="checkbox"/> House noises	<input type="checkbox"/> Message read
<input type="checkbox"/> Accent	<input type="checkbox"/> Kitchen noises	<input type="checkbox"/> Taped message
<input type="checkbox"/> Angry	<input type="checkbox"/> Street noises	<input type="checkbox"/> Irrational
<input type="checkbox"/> Calm	<input type="checkbox"/> Booth	<input type="checkbox"/> Profane
<input type="checkbox"/> Clearing throat	<input type="checkbox"/> PA system	<input type="checkbox"/> Well-spoken
<input type="checkbox"/> Coughing	<input type="checkbox"/> Conversation	
<input type="checkbox"/> Cracking Voice	<input type="checkbox"/> Music	
<input type="checkbox"/> Crying	<input type="checkbox"/> Motor	
<input type="checkbox"/> Deep	<input type="checkbox"/> Clear	
<input type="checkbox"/> Deep breathing	<input type="checkbox"/> Static	
<input type="checkbox"/> Disguised	<input type="checkbox"/> Office machinery	
<input type="checkbox"/> Distinct	<input type="checkbox"/> Factory machinery	
<input type="checkbox"/> Excited	<input type="checkbox"/> Local	
<input type="checkbox"/> Laughter	<input type="checkbox"/> Long distance	
<input type="checkbox"/> Lisp		
<input type="checkbox"/> Loud		
<input type="checkbox"/> Nasal		
<input type="checkbox"/> Normal		
<input type="checkbox"/> Ragged		
<input type="checkbox"/> Rapid		
<input type="checkbox"/> Raspy		
<input type="checkbox"/> Slow		
<input type="checkbox"/> Slurred		
<input type="checkbox"/> Soft		
<input type="checkbox"/> Stutter		

Other Information:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## **Bullying and Harassment Incident Reporting Form**

Please send completed form to the Academic Administrator.

**Date:**

**Time:**

**Reporting Person:**

**Student Name (Target of the Bullying):**

**SID#:**

**Grade:**

**Name(s) of Alleged Bully:**

**On what date(s) did the incident occur?**

**Location of the incident?**

**Describe what occurred:**

**Witnesses: *Names of staff or students who witnessed this incident:***

**Was administration or school staff notified of this incident? *If yes, please indicate the administrator notified and the date and time of notification:***

**Any other relevant information or details about the incident:**

*The school is not permitted to provide information about other students or discipline issued to other students with the reporting parent.*



## Hate-Motivated Behaviors and Hate Crime Investigation Form

[For School recording purposes only]

**I. SCHOOL:** \_\_\_\_\_

**II. NAME OF INVESTIGATOR:** \_\_\_\_\_

**III. DATE COMPLAINT RECEIVED:** \_\_\_\_\_

**IV: WHO REPORTED?** (If student, must notify parent): \_\_\_\_\_

**V. WHAT WAS REPORTED?** \_\_\_\_\_

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### VI. INTERVIEW LIST

Person: \_\_\_\_\_ Date: \_\_\_\_\_

Person: \_\_\_\_\_ Date: \_\_\_\_\_

Person: \_\_\_\_\_ Date: \_\_\_\_\_

Person: \_\_\_\_\_ Date: \_\_\_\_\_

Person: \_\_\_\_\_ Date: \_\_\_\_\_

### VII. DOCUMENTS REVIEWED:

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### VIII. FINDINGS/DETERMINATION:

**Evidence to Support Allegations:** \_\_\_\_\_

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**Evidence Disproving Allegations:** \_\_\_\_\_

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**IX. ADDITIONAL FACTORS TO CONSIDER:**

Has this incident reached a threat level? \_\_\_\_\_

Is there evidence that this incident is part of a larger pattern of bullying or bias? \_\_\_\_\_ If yes, explain previous incidents: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Were there any subsequent/retaliatory incidents: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**X. CORRECTIVE ACTIONS (Check all that apply):**

	Involving Accused Person(s)	Date
<input type="checkbox"/>	<b>Parent Informed of Complaint</b> <input type="checkbox"/> Conference <input type="checkbox"/> Letter <input type="checkbox"/> Telephone	/ /
<input type="checkbox"/>	<b>Parent Informed of Findings</b> <input type="checkbox"/> Conference <input type="checkbox"/> Letter <input type="checkbox"/> Telephone	/ /
<input type="checkbox"/>	<b>Provide/Explain School Nondiscrimination Policy</b>	/ /
<input type="checkbox"/>	<b>Explain Non-Retaliation &amp; Harassment</b>	/ /
<input type="checkbox"/>	<b>Referral for School Counseling</b>	/ /
<input type="checkbox"/>	<b>Education/Behavior Contract</b>	/ /
<input type="checkbox"/>	<b>School Discipline Provided</b>	/ /
<input type="checkbox"/>	<b>Disciplinary Conference</b>	/ /
<input type="checkbox"/>	<b>Suspension</b>	/ /
<input type="checkbox"/>	<b>Expulsion</b>	/ /



<input type="checkbox"/>	Accused Person's Parents Notified of Resolution of Incident/Complaint	/ /
<input type="checkbox"/>	Safety Plan	/ /
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**XI. Remedies for Reporting Party:**

	Involving Accused Person(s)	Date
<input type="checkbox"/>	Parent Informed of Findings <input type="checkbox"/> Conference <input type="checkbox"/> Letter <input type="checkbox"/> Telephone	/ /
<input type="checkbox"/>	Provide/Explain School Nondiscrimination Policy	/ /
<input type="checkbox"/>	Referral for School Counseling	/ /
<input type="checkbox"/>	Other	/ /
<input type="checkbox"/>		
<input type="checkbox"/>		

**PROVIDE A COPY OF THE COMPLETED RECORD TO THE ACADMIC ADMINSTRATOR**





## SUSPECTED CHILD ABUSE REPORT (Pursuant to Penal Code section 11166)

Print Form Clear Form

**To Be Completed by Mandated Child Abuse Reporters**  
PLEASE PRINT OR TYPE

CASE NAME: \_\_\_\_\_

CASE NUMBER: \_\_\_\_\_

<b>A. REPORTING PARTY</b>	NAME OF MANDATED REPORTER			TITLE			MANDATED REPORTER CATEGORY				
	REPORTER'S BUSINESS/AGENCY NAME AND ADDRESS						DID MANDATED REPORTER WITNESS THE INCIDENT?				
	Street		City		Zip		<input type="checkbox"/> YES <input type="checkbox"/> NO				
REPORTER'S TELEPHONE (DAYTIME)			SIGNATURE						TODAY'S DATE		
<b>B. REPORT NOTIFICATION</b>	<input type="checkbox"/> LAW ENFORCEMENT			<input type="checkbox"/> COUNTY PROBATION			AGENCY				
	<input type="checkbox"/> COUNTY WELFARE / CPS (Child Protective Services)										
	ADDRESS			City			Zip			DATE/TIME OF PHONE CALL	
OFFICIAL CONTACTED - NAME AND TITLE						TELEPHONE					
<b>C. VICTIM One report per victim</b>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE		SEX	ETHNICITY <span style="float: right;">▼</span>			
	ADDRESS			City			Zip			TELEPHONE	
	PRESENT LOCATION OF VICTIM				SCHOOL			CLASS		GRADE	
	PHYSICALLY DISABLED?		DEVELOPMENTALLY DISABLED?		OTHER DISABILITY (SPECIFY)				PRIMARY LANGUAGE SPOKEN IN HOME		
	<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO								
	IN FOSTER CARE?		IF VICTIM WAS IN OUT-OF-HOME CARE AT TIME OF INCIDENT, CHECK TYPE OF CARE:				TYPE OF ABUSE (CHECK ONE OR MORE):				
<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> DAY CARE		<input type="checkbox"/> CHILD CARE CENTER		<input type="checkbox"/> FOSTER FAMILY HOME		<input type="checkbox"/> PHYSICAL <input type="checkbox"/> MENTAL			
<input type="checkbox"/> NO		<input type="checkbox"/> FAMILY FRIEND		<input type="checkbox"/> GROUP HOME OR INSTITUTION		<input type="checkbox"/> RELATIVE'S HOME		<input type="checkbox"/> SEXUAL <input type="checkbox"/> NEGLECT			
								<input type="checkbox"/> OTHER (SPECIFY) _____			
RELATIONSHIP TO SUSPECT					PHOTOS TAKEN?		DID THE INCIDENT RESULT IN THIS VICTIM'S DEATH?				
					<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> UNK				
<b>D. INVOLVED PARTIES</b>	<b>VICTIM'S SIBLINGS</b>										
	NAME		BIRTHDATE		SEX	ETHNICITY		NAME		BIRTHDATE	
	1. _____		3. _____					4. _____			
	2. _____										
<b>VICTIM'S PARENTS/GUARDIANS</b>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE		SEX	ETHNICITY <span style="float: right;">▼</span>			
	ADDRESS			City			Zip			HOME PHONE	
	BUSINESS PHONE										
	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE		SEX	ETHNICITY <span style="float: right;">▼</span>			
ADDRESS			City			Zip			HOME PHONE		
BUSINESS PHONE											
<b>SUSPECT</b>	SUSPECT'S NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE		SEX	ETHNICITY <span style="float: right;">▼</span>			
	ADDRESS			City			Zip			TELEPHONE	
	OTHER RELEVANT INFORMATION										
<b>E. INCIDENT INFORMATION</b>	IF NECESSARY, ATTACH EXTRA SHEET(S) OR OTHER FORM(S) AND CHECK THIS BOX <input type="checkbox"/> IF MULTIPLE VICTIMS, INDICATE NUMBER: _____										
	DATE/TIME OF INCIDENT				PLACE OF INCIDENT						
	NARRATIVE DESCRIPTION (What victim(s) said/what the mandated reporter observed/what person accompanying the victim(s) said/similar or past incident's involving the victim(s) or suspect)										

**DO NOT** submit a copy of this form to the Department of Justice (DOJ). The investigating agency is required under Penal Code section 11169 to submit to DOJ a Child Abuse or Severe Neglect Indexing Form BCIA 8583 if (1) an active investigation was conducted and (2) the incident was determined to be substantiated.







## SUSPECTED CHILD ABUSE REPORT (Pursuant to Penal Code section 11166)

### DEFINITIONS AND GENERAL INSTRUCTIONS FOR COMPLETION OF FORM BCIA 8572

All Penal Code (PC) references are located in Article 2.5 of the California PC. This article is known as the Child Abuse and Neglect Reporting Act (CANRA). The provisions of CANRA may be viewed at: <http://leginfo.legislature.ca.gov/faces/codes.xhtml> (specify "Penal Code" and search for sections 11164-11174.3). A mandated reporter must complete and submit form BCIA 8572 even if some of the requested information is not known. (PC section 11167(a).)

#### I. MANDATED CHILD ABUSE REPORTERS

Mandated child abuse reporters include all those individuals and entities listed in PC section 11165.7.

#### II. TO WHOM REPORTS ARE TO BE MADE ("DESIGNATED AGENCIES")

Reports of suspected child abuse or neglect shall be made by mandated reporters to any police department or sheriff's department (not including a school district police or security department), the county probation department (if designated by the county to receive mandated reports), or the county welfare department. (PC section 11165.9.)

#### III. REPORTING RESPONSIBILITIES

Any mandated reporter who has knowledge of or observes a child, in his or her professional capacity or within the scope of his or her employment, whom he or she knows or reasonably suspects has been the victim of child abuse or neglect shall report such suspected incident of abuse or neglect to a designated agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof **within 36 hours** of receiving the information concerning the incident. (PC section 11166(a).)

No mandated reporter who reports a suspected incident of child abuse or neglect shall be held civilly or criminally liable for any report required or authorized by CANRA. Any other person reporting a known or suspected incident of child abuse or neglect shall not incur civil or criminal liability as a result of any report authorized by CANRA unless it can be proven the report was false and the person knew it was false or made the report with reckless disregard of its truth or falsity. (PC section 11172(a).)

#### IV. INSTRUCTIONS

**SECTION A – REPORTING PARTY:** Enter the mandated reporter's name, title, category (from PC section 11165.7), business/agency name and address, daytime telephone number, and today's date. Check yes/no whether the mandated reporter witnessed the incident. The signature area is for either the mandated reporter or, if the report is telephoned in by the mandated reporter, the person taking the telephoned report.

#### IV. INSTRUCTIONS (continued)

**SECTION B – REPORT NOTIFICATION:** Complete the name and address of the designated agency notified, the date/time of the phone call, and the name, title, and telephone number of the official contacted.

**SECTION C – VICTIM (One Report per Victim):** Enter the victim's name, birthdate or approximate age, sex, ethnicity, address, telephone number, present location, and, where applicable, enter the school, class (indicate the teacher's name or room number), and grade. List the primary language spoken in the victim's home. Check the appropriate yes/no box to indicate whether the victim may have a developmental disability or physical disability and specify any other apparent disability. Check the appropriate yes/no box to indicate whether the victim is in foster care, and check the appropriate box to indicate the type of care if the victim was in out-of-home care. Check the appropriate box to indicate the type of abuse. List the victim's relationship to the suspect. Check the appropriate yes/no box to indicate whether photos of the injuries were taken. Check the appropriate box to indicate whether the incident resulted in the victim's death.

**SECTION D – INVOLVED PARTIES:** Enter the requested information for Victim's Siblings, Victim's Parents/Guardians, and Suspect. Attach extra sheet(s) if needed (provide the requested information for each individual on the attached sheet(s)).

**SECTION E – INCIDENT INFORMATION:** If multiple victims, indicate the number and submit a form for each victim. Enter date/time and place of the incident. Provide a narrative of the incident. Attach extra sheet(s) if needed.

#### V. DISTRIBUTION

**Reporting Party:** After completing form BCIA 8572, retain a copy for your records and submit copies to the designated agency.

**Designated Agency:** **Within 36 hours** of receipt of form BCIA 8572, the initial designated agency will send a copy of the completed form to the district attorney and any additional designated agencies in compliance with PC sections 11166(j) and 11166(k).

#### ETHNICITY CODES

1 Alaskan Native	6 Caribbean	11 Guamanian	16 Korean	22 Polynesian	27 White-Armenian
2 American Indian	7 Central American	12 Hawaiian	17 Laotian	23 Samoan	28 White-Central American
3 Asian Indian	8 Chinese	13 Hispanic	18 Mexican	24 South American	29 White-European
4 Black	9 Ethiopian	14 Hmong	19 Other Asian	25 Vietnamese	30 White-Middle Eastern
5 Cambodian	10 Filipino	15 Japanese	21 Other Pacific Islander	26 White	31 White-Romanian





50 Moreland Road  
 Simi Valley, CA 93065  
 Ph. 805-581-0202  
 Fax 805-581-8824

## SAFETY RISK REFERRAL

This form is to be completed if any teacher or staff member is a concerned a student is **in immediate risk of harming themselves or someone else.**

Call the authorities immediately to ensure the student's safety **and then** complete this Safety Risk Referral.

***Before proceeding, please indicate if you are concerned that a student is in immediate risk to harm themselves or someone else? \*  Yes  No***

- If yes, please continue
- if no, please contact your Lead to discuss appropriate supports (Compass Referral, Care Solace, etc.)
- If your concern is regarding the possibility of child abuse or a child welfare check please refer to your administrator for these processes and **do not complete this form.**

**After the authorities have been notified,** email the Regional School Psychologist for the student's school.

***\*\*Include school Principal and any other team members (RLT, SpEd CM, etc.) in the Safety Risk Referral email and in all follow-up and outcome information.***

Employee Name:	School:	Date:
Student First Name:	M.I.:	Last Name:
Student's ID:	Student's Age:	Student's Grade:
Mother's/Guardian's Name:		
Father's/Guardian's Name:		
Student's <u>Complete</u> Address of Residence:		
Family ID#, Names of any siblings enrolled:		





Incident Date:	Welfare Check Case #:
Presenting Concerns (summary of the incidents, concerns, input, observations, etc.):	

Action Taken by **Reporting staff member**  
(include specific information about authorities contacted -e.g., names, numbers, etc. along with any actions taken involving contacting student, parent, RLT, etc.):

**Parent Contact:**

Yes (indicate Date/ Time)  
 No (indicate Attempts to contact)

Interview Completed with-  
Notes of Interview-

**Is the student reported to be under adult supervision at this time?**

Yes  
 No  
 Unknown



## Suicide Prevention/Postvention

Updated by boards December 2021 (reviewed annually as part of the CSSP)

### Information

Insight schools recognizes that suicide is a leading cause of death among youth and that an even greater amount of youth considers (17 percent of high school students) and attempt suicide (over 8 percent of high school students) (Centers for Disease Control and Prevention, 2015).

The possibility of suicide and suicidal ideation requires vigilant attention from our school staff. As a result, we are ethically and legally responsible for providing an appropriate and timely response in preventing suicidal ideation, attempts, and deaths. We also must work to create a safe and nurturing environment. Recognizing that it is the duty of the school to support the health, safety, and welfare of its students, this policy aims to safeguard students and staff against suicide attempts, deaths and other trauma associated with suicide, including ensuring adequate supports for students, staff, and families affected by suicide attempts and loss. As it is known that the emotional wellness of students greatly impacts school attendance and educational success, this policy shall be paired with other policies that support the emotional and behavioral wellness of students.

This policy is based on research and best practices in suicide prevention and has been adopted with the understanding that suicide prevention activities decrease suicide risk, increase help-seeking behavior, identify those at risk of suicide, and decrease suicidal behaviors. Empirical evidence refutes a common belief that talking about suicide can increase risk or “place the idea in someone’s mind.”

In an attempt to reduce suicidal behavior and its impact on students and families, the Head of School or Designee shall develop strategies for suicide prevention, intervention, and postvention, and the identification of the mental health challenges frequently associated with suicidal thinking and behavior. These strategies shall include professional development for all school personnel in all job categories who regularly interact with students or are able to recognize the risk factors and warning signs of suicide. The Head of School or Designee shall develop and implement preventive strategies and intervention procedures that include the following:

### Overall Strategic Plan for Suicide Prevention

The Head of School or Designee shall involve all stakeholders in planning, implementing, and evaluating the school’s strategies for suicide prevention and intervention. To ensure the policies regarding suicide prevention are properly adopted, implemented, and updated, Insight schools will have the Compass Team serve as the suicide prevention point of contact for the school.

### Messaging about Suicide Prevention

Messaging about suicide has an effect on suicidal thinking and behaviors. Consequently, Insight schools has reviewed and will continue to review all materials and resources used in awareness efforts to ensure they align with best practices for safe messaging about suicide.

### Suicide Prevention Training and Education

Training shall be provided for all school staff members.

- All staff shall receive training annually on the risk factors and warning signs of suicide, suicide prevention, intervention, referral, and postvention.
- All suicide prevention trainings shall be offered under the direction of mental health professionals who have received advanced training specific to suicide and may benefit from collaboration with one or more county and/or community mental health agencies. Staff training can be adjusted year-to-year based on previous professional development activities and emerging best practices.





- At a minimum, all staff shall participate in training on the core components of suicide prevention (identification of suicide risk factors and warning signs, prevention, intervention, referral, and postvention) at the beginning of their employment. Previously employed staff members shall attend a minimum of one-hour general suicide prevention training. Core components of the general suicide prevention training shall include:
  - Suicide risk factors, warning signs, and protective factors;
  - How to talk with a student about thoughts of suicide;
  - How to respond appropriately to the youth who has suicidal thoughts.
  - Emphasis on immediately referring (same day) any student who is identified to be at risk of suicide for a Safety Risk ~~assessment~~ by a qualified professional (licensed mental health clinician, physician, crisis response team, law enforcement officer, or other emergency mental health provider);
  - Emphasis on reducing stigma associated with mental illness and that early prevention and intervention can drastically reduce the risk of suicide;
  - Reviewing the data annually to look for any patterns or trends of the prevalence or occurrence of suicide ideation, attempts, or death. Data from the California School Climate, Health, and Learning Survey (Cal-SCHLS) should also be analyzed to identify school climate deficits and drive program development.

In addition to initial orientations to the core components of suicide prevention, ongoing annual staff professional development for all staff should include the following components:

- The impact of traumatic stress on emotional and mental health;
- Common misconceptions about suicide;
- Suicide prevention resources;
- Appropriate messaging about suicide (correct terminology, safe messaging guidelines);
- The factors associated with suicide (risk factors, warning signs, protective factors);
- How to identify youth who may be at risk of suicide;
- Appropriate ways to interact with a youth who is demonstrating emotional distress or is suicidal. Specifically, how to talk with a student about their thoughts of suicide and (based on district guidelines) how to respond to such thinking; how to talk with a student about thoughts of suicide and appropriately respond and provide support based on district guidelines;
- School-approved procedures for responding to suicide risk (including multi-tiered systems of support and referrals);
- School-approved procedures for responding to the aftermath of suicidal behavior (suicidal behavior postvention);
- Responding after a suicide occurs (suicide postvention);
- Resources regarding youth suicide prevention;
- Emphasis on stigma reduction and the fact that early prevention and intervention can drastically reduce the risk of suicide;
- Emphasis that any student who is identified to be at risk of suicide is to be immediately referred (same day) for assessment by a qualified professional (licensed mental health clinician, physician, crisis response team, law enforcement officer, or other emergency mental health provider)

The professional development also shall include additional information regarding groups of students judged by the school, and available research, to be at elevated risk for suicide. These groups include, but are not limited to, the following:

- Youth affected by suicide;
- Youth with a history of suicide ideation or attempts;
- Youth with disabilities, mental illness, or substance abuse disorders;
- Lesbian, gay, bisexual, transgender, or questioning youth;
- Youth experiencing homelessness or in out-of-home settings, such as foster care;
- Youth who have suffered traumatic experiences.



## Employee Qualifications and Scope of Services

Employees of the Insight schools must act only within the authorization and scope of their credential or license. While it is expected that school professionals can identify suicide risk factors and warning signs, and to prevent the immediate risk of a suicidal behavior, treatment of suicidal ideation is typically beyond the scope of services offered in the school setting. In addition, treatment of the mental health challenges often associated with suicidal thinking typically requires mental health resources beyond what schools can provide.

## Specialized Staff Training (Screening)

Additional professional development in suicide risk assessment and crisis intervention shall be provided to mental health professionals employed by Insight schools.

## Parents, Guardians, and Caregivers Participation and Education

- To the extent possible, parents/guardians/caregivers should be included in all suicide prevention efforts. At a minimum, schools shall share with parents/guardians/caregivers the school's suicide prevention policy and procedures.
- This suicide prevention policy shall be prominently displayed on the school's web page and included in the parent-student handbook.
- Parents/guardians/caregivers should be invited to provide input on the development and implementation of this policy.
- All parents/guardians/caregivers should have access to suicide prevention training that addresses the following:
  - Suicide risk factors, warning signs, and protective factors;
  - How to talk with a student about thoughts of suicide;
  - How to respond appropriately to the student who has suicidal thoughts. Such responses shall include constant supervision of any student judged to be at risk for suicide and referral for an immediate suicide risk assessment.

## Student Participation and Education

Students shall:

- Receive developmentally appropriate, student-centered education about the warning signs of mental health challenges and emotional distress;
- Receive developmentally appropriate guidance regarding the school's suicide prevention, intervention, and referral procedures.
- Receive student-focused suicide prevention education that can be incorporated into classroom curricula.
- The content of the education shall include:
  - Coping strategies for dealing with stress and trauma;
  - How to recognize behaviors (warning signs) and life issues (risk factors) associated with suicide and mental health issues in oneself and others;
  - Help-seeking strategies for oneself and others, including how to engage school-based and community resources and refer peers for help;
  - Emphasis on reducing the stigma associated with mental illness and the fact that early prevention and intervention can drastically reduce the risk of suicide.





## Intervention, Screening, Referral

### Action Plan for Suicide Attempt During-School Hours

If a suicide attempt is made during the school day, it is important to remember that the health and safety of the student and those around him/her is critical. The following steps should be implemented. Follow the Risk Safety Referral process and remember the following:

- Remain calm, remember the student is overwhelmed, confused, and emotionally distressed;
- Call 911 (local authorities based on location of student) and provide as much information about student and your concerns;
- Move all other students out of the immediate area (when in-person for outing or testing) or remove from online classroom;
- Please follow the Risk Safety Referral process for documentation, communication processes and follow-up.

### Action Plan for Suicide Attempt After-School Hours

If a suicide attempt by a student is after hours, it is crucial that the school protects the privacy of the student and maintain a confidential record of the actions taken to intervene, support, and protect the student. The following steps should be implemented:

- Contact the parents/guardians/caregivers and offer support to the family;
- Discuss with the family how they would like the school to respond to the attempt;
- Obtain permission from the parents/guardians to share information with staff;

*Students shall be encouraged to notify a staff member when they are experiencing emotional distress or suicidal ideation, or when they suspect or have knowledge of another student's emotional distress, suicidal ideation, or attempt.*

### Parental Notification and Involvement

Insight schools shall identify a process to ensure continuing care for the student identified to be at risk of suicide. The following steps should be followed to ensure continuity of care:

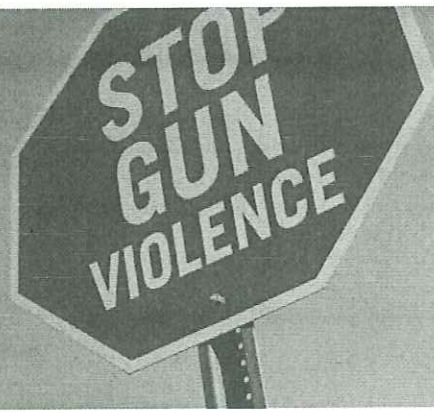
- After the Safety Risk Referral process is followed, administrator shall verify with the parent/guardian/caregiver that follow-up treatment has been accessed. Parents/guardians/caregivers will be required to provide documentation of care for the student.
- If parents/guardians/caregivers refuse or neglect to access treatment for a student who has been identified to be at-risk for suicide or in emotional distress, the administrator will meet with the parents/guardians/caregivers to identify barriers to treatment (e.g., cultural stigma, financial issues) and work to rectify the situation and build understanding of the importance of care.

### Re-Entry to School After a Suicide Attempt

A student who threatened or attempted suicide is at a higher risk for suicide in the months following the crisis. Having a streamlined and well-planned re-entry process ensures the safety and wellbeing of students who have previously attempted suicide and reduces the risk of another attempt. An appropriate re-entry process is an important component of suicide prevention. Involving students in planning for their return to school provides them with a sense of control, personal responsibility, and empowerment. Insight school's administration will follow the re-entry process to ensure the student's successful re-integration into the school, or successful transfer to another setting.







# School Safety: Firearm Safety and Storage

By Angela Asch / May 2023

With the passage of Senate Bill 906 in 2022, California's local educational agencies will be required to notify families annually about safe gun storage beginning in the 2023–24 school year. This fact sheet offers a quick reference to the rules and regulations of firearm storage in California, statistics about firearms, and strategies to keep students, staff and communities safe.

## IN THIS FACT SHEET:

- ▶ Statistics about firearms
- ▶ An overview of Senate Bill 906 (2022)
- ▶ Steps districts and county offices of education can take to support safe gun storage
- ▶ Steps parents, guardians, and communities can take to ensure safe gun storage
- ▶ References to relevant California rules and legislation
- ▶ Links to relevant resources and sample communication from local educational agencies

for protecting the lives of students as well as the constitutional rights of those who wish to bear arms.

The RAND Corporation estimates that 4.6 million U.S. children under the age of 18 live in a home with a loaded and unlocked firearm. RAND also reports that, "in homes with at least one unlocked and loaded firearm, 60 percent of children 13 to 17 years of age reported being able to access a firearm in less than five minutes."

## Prevention measures to keep students and staff safe

School districts and county offices of education should keep their comprehensive school safety plans and policies up to date, review them annually, and communicate safety protocols with parents, guardians, and their community. This includes regular and accessible communication about safety risks, best practices, and prevention measures that help keep communities safe.

In addition, Project ChildSafe has a list of California law enforcement agencies that offer families free gun safety kits that include a cable-style lock. Districts may want to contact their local law enforcement agency to inquire about the free kit. This information can be shared with their communities in the annual parental notifications.

According to the American Academy of Pediatrics (AAP) and the American Academy of Child and Adolescent Psychiatry, firearms are the leading cause of death among children under the age of 18 in the United States. The U.S. has the highest rate of firearm mortality among all developed nations. In 2022, firearms led to the deaths of 1,679 children and injured 812, according to the Gun Violence Archive. Further, deaths from gun violence jumped 50 percent from 2019 to 2021 among children and teens in the U.S., as reported by Pew Research Center.

And while gun ownership is constitutionally protected in the United States, the Society for Research in Child Development reports that access to firearms increases the risk of death by suicide among children and adolescents, stating that a third of households in the country own at least one firearm and "nine out of 10 child and adolescent suicides by gun involve firearms from the victim's own home or that of a relative." Responsible gun ownership is essential







## CALIFORNIA SENATE BILL 906

SB 906 was signed into law on July 21, 2022, and requires the California Department of Education, in consultation with relevant local educational agencies (LEAs), civil rights groups, and the Department of Justice, to develop model content that informs parents or guardians of California's child access prevention laws and laws relating to the safe storage of firearms. This model curriculum must be created and distributed prior to July 1, 2023.

Starting in the 2023–24 school year, California education code requires that all LEAs communicate about safe firearm storage to their students, families, and communities in the required annual parental notifications (Ca. Educ. Code § 49392.).

SB 906 also requires school officials whose duties involve regular contact with middle or high school students in grades 6-12 to immediately report to law enforcement any threat or perceived threat that the official is alerted to or observes.

With the support of the LEA, the local law enforcement agency or school site police must immediately investigate the reported threat and conduct a threat assessment. Additional guidance on SB 906 can be found here on CSBA's blog.



## Relevant rules and regulations for California firearms storage

In California, all firearms in the home must either be kept in a locked container or secured with a locking device that prevents the gun from functioning if a child under the age of 18 is in the home (Pen. Code, § 25100.) Fines may be incurred if adults know or reasonably should know that a child is likely to gain access to the firearm without permission of the child's parent, unless reasonable action is taken to secure the firearm. Other municipal codes may also apply.

## Safety measures for families

Children want to explore their environments and are curious about the world around them, thus it is important for parents and guardians to educate children about firearms to protect children from harm. A child as young as 3 years old may be able to pull the trigger of a firearm, resulting in lethal harm. Additionally, young children have difficulty assessing risk, especially when inanimate objects resemble toys.

The most effective strategy for keeping children and communities safe is to keep firearms away from environments where children learn, play, and grow. According to the AAP, the risk of death by suicide using a firearm is five times higher when firearms are in the home than when no firearms are present. Therefore, it is imperative that adults eliminate preventable risks, and hiding firearms is not sufficient. If firearms are present in the home, they must be kept unloaded, locked in a secure lock box or safe, and the ammunition stored in a lock box or safe separate from the firearm. The Attorney General's Office has a list of safety devices available for purchase and includes device and firearm compatibility.

It is also critical to communicate with children, in age-appropriate ways, that firearms are not toys, that they should tell an adult if they find a firearm, and they are not to touch or pick up found firearms or play with guns. Resources from the AAP on how to communicate with children and other families about firearm safety are listed at the end of this fact sheet.

Many LEAs, like the San Francisco Unified School District, Los Angeles USD, and Woodland Joint USD, already communicate the state requirements of firearm safety and storage regulations, statistics on firearms, and best practices with their communities. Including safety information in multiple languages and making that information accessible on various communication platforms annually will help ensure that all families receive this education.





## School safety resources

California school administrators and governance teams play an essential role in creating safe and supportive school environments. The most effective approach to safe and supportive school environments requires a comprehensive, coordinated effort including schoolwide, districtwide, and communitywide strategies. The following resources include how to create safe and supportive school environments and school safety prevention strategies:

- ▶ **Safe and supportive school environments:** CSBA offers governance teams resources to enhance school safety, including guidance on a range of safety issues, sample board policies and administrative regulations, tips on developing comprehensive school safety plans, communicating during a crisis, and relevant magazine articles, policy briefs, and blogs.
- ▶ **Violence prevention:** The California Department of Education's (CDE) Violence Prevention webpage includes violence prevention strategies, safe storage of firearms, and school safety planning best practices. The website also has sample templates for the memoranda to parents and guardians in English and Spanish, informing them on the laws in California about the safe storage of firearms.
- ▶ **Youth suicide prevention:** The CDE provides a list of resources to help school districts address the need for youth suicide prevention, intervention, and postvention, including a model youth suicide prevention policy for LEAs.
- ▶ **Firearm safety:** The California Attorney General's Firearm Safety page offers comprehensive information for parents, guardians, and community members that includes basic gun safety rules, owner responsibilities, rules for kids, childproofing your firearm, and a Firearm Safety Certificate study guide.
- ▶ **Gun safety campaign toolkit:** The AAP's Ask About Guns media campaign toolkit offers social media posts, informational videos, and articles to educate parents, guardians, and community members to reduce injuries and deaths.
- ▶ **Project ChildSafe:** Project ChildSafe is committed to providing educators (including firearm instructors and K-12 teachers) and students with the resources they need to spread the message

of firearms safety. Resources include checklists, tips, and videos to help educate students.

- ▶ **Be Smart:** The Be Smart resources and tools hub offers downloadable and print-friendly handouts on secure gun storage, how to talk to children about guns, maps on unintentional child shootings, and a map tracking gunfire on school grounds since 2013, in English and Spanish. The site also provides a database of law enforcement agencies that participate in providing free gun safety kits to families.
- ▶ **National Center for Education Statistics:** The National Center for Education Statistics (NCES) is the primary federal entity for collecting and analyzing data related to education in the U.S. and other nations. NCES is housed within the U.S. Department of Education and the Institute of Education Sciences. NCES also publishes fact sheets and reports on school crime and safety, violence prevention, and students' access to firearms.

## Relevant CSBA sample policies

CSBA GAMUT Policy and Policy *Plus* subscribers have access to sample policies. The following are sample policies relevant to SB 906.

- ▶ BP 0450 – Comprehensive Safety Plan
- ▶ BP 3515 – Campus Security
- ▶ BP 5137 – Positive School Climate
- ▶ BP 5142 – Safety
- ▶ BP 5131.7 – Weapons and Dangerous Instruments
- ▶ BP 5141.5 – Mental Health
- ▶ BP 5145.6 – Parent/Guardian Notifications

Angela Asch is an education policy analyst for the California School Boards Association.



