



## MEETING AGENDA - Empower Generations Board

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all of the Board members shall be available for public inspection at the main office of the school between 9:00 am and 3:30 pm.

### Meeting

	<b>Special meeting</b>
<b>Meeting Date</b>	Thursday, December 9, 2021
<b>Start Time</b>	4:00 PM
<b>End Time</b>	4:15 PM
<b>Location</b>	This meeting will be held virtually. You may join us on ZOOM at: Zoom Meeting: <a href="https://zoom.us/j/5395735793">https://zoom.us/j/5395735793</a> Meeting ID: 539 573 5793 Dial in Number: 1-669-900-6833
<b>Purpose</b>	Educator Effectiveness Plan Review

### Agenda

#### 1. Opening Items

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1.1. Call The Meeting To Order

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1.2. Roll Call

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1.3. Approve Agenda

**Due date:** 12/9/2021

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#### 2. Public Comments

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2.1. Public Comments

The public may address the Empower Generations governing board regarding any item within the Board's jurisdiction whether or not that item appears on the agenda during this time. If you wish to address the Board, please complete a public comment card. Comments for the public will be limited to 3 minutes.

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#### 3. Discussion and Reports

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3.1. Educator Effectiveness Plan Review

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#### 4. Board Comments

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4.1. Board Comments

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#### 5. Closing Items

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## 5.1. Adjournment

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**Please note:** items on the agenda may not be addressed in the order they appear. The Board of Directors may alter the order at their discretion.

- **Board Room Accessibility:** The Board of Directors encourage those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services to participate in the public meeting, please contact the office at least 48 hours before the scheduled Board of Directors meeting so that we may make every reasonable effort to accommodate you. [Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132).]

*The Secretary of the Board of Directors, hereby certifies that this agenda was publicly posted 72 or 24 hours prior to the meeting as required by law.*



**EMPOWER GENERATIONS  
EDUCATOR EFFECTIVENESS BLOCK GRANT 2021  
EXPENDITURE PLAN**

LEA Name:	Contact Name:	Email Address:	Phone Number:
Empower Generations	Malaka Donovan, Director	malaka.donovan@empowergenerations.org	(818) 675-7500

Total amount of Educator Effectiveness funds received by the LEA:	Date of Public Meeting prior to adoption:	Date of adoption at public meeting:
\$171,522.00	12/9/21	Pending

**Describe how the LEA is coordinating Title II funds with the expenditure of Educator Effectiveness Block Grant funds to support teachers and administrators.**

Through the funds provided by the Educator Effectiveness Block Grant, Empower Generations will be able to implement a more robust professional development plan to support the growth of all learners. The LEA plans to supplement Title II funds with the Educator Effectiveness Block Grant funds to provide additional teacher and administrator training in the areas of Coaching & Mentoring, Standard-Aligned Instruction, Accelerated Learning, Social Emotional Support, Positive School Climate, Individualized Education Plans, English Learner Programs, Professional Learning Networks, Ethnic Studies, and Early Childhood Education.

Describe how the LEA allowed school site and content staff to identify the topic or topics of professional learning.

The school staff reviewed ongoing, past, and present staff development needs and plans to develop what specific training may take place using the Educator Effectiveness Block Grant according to the allowable categories and school data.

Total Expenditure FY 2022-23	Total Expenditure FY 2023-24	Total Expenditure FY 2024-25	Total Expenditure FY 2025-26	Total Budgeted Educator Effectiveness Expenditures
\$42,880.50	\$42,880.50	\$42,880.50	\$42,880.50	\$171,522.00

#### Planned Activities

1	<b><u>Coaching &amp; Mentoring:</u></b>  Activities may include but are not limited to: Teacher induction to clear credentials, other coaching and mentoring work, iLEAD methods, etc.
2	<b><u>Standard-Aligned Instruction:</u></b>  Activities may include but are not limited to: Language arts, math, PBL, science, social studies, CTE curriculum pathways, iLEAD methods, dual language immersion training, data protocols, etc.
3	<b><u>Accelerated Learning:</u></b>  Activities may include but are not limited to: AP summer institutes, IB training and certification, etc.
4	<b><u>Social Emotional Support:</u></b>  Activities may include but are not limited to: Trauma-informed training, Leader in Me, etc.
5	<b><u>Positive School Climate:</u></b>  Activities may include but are not limited to: Equity training, MTSS, restorative practices, 7 Habits, play-based learning, etc.

6	<b><u>Individualized Education Plans:</u></b> Activities may include but are not limited to: Orton Gillingham training, special education training, etc.
7	<b><u>English Learner Programs:</u></b> Activities may include but are not limited to: EL training, etc.
8	<b><u>Professional Learning Networks:</u></b> Activities may include but are not limited to: Education conferences, required travel, and memberships such as A+, CCSA, CSDC, College Board, etc.
9	<b><u>Ethnic Studies:</u></b> Activities may include but are not limited to: Ethnic studies training, diversity, equity and inclusion training, etc.
10	<b><u>Early Childhood Education:</u></b> Activities may include but are not limited to: Early childhood education training and coursework, etc.

#### [EC 41480](#)

(a)(2) A school district, county office of education, charter school, or state special school may expend the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2025–26 fiscal year, inclusive. School districts, county offices of education, charter schools, and state special schools **shall coordinate the use of any federal funds received under Title II of the federal Every Student Succeeds Act of 2015 (Public Law 114–95) to support teachers and administrators with the expenditure of funds received pursuant to this subdivision.**

(b) A school district, county office of education, charter school, or state special school shall expend funds apportioned pursuant to this section to provide professional learning for **teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils**, with a focus on any of the following areas:

- (1) **Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision-making**

skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.

- (2) Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- (3) Practices and strategies that reengage pupils and lead to accelerated learning.
- (4) Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- (5) Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a schoolsite's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.
- (6) Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- (7) Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- (8) New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).
- (9) Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- (10) Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

(c) To ensure professional development meets educator and pupil needs, **local educational agencies are encouraged to allow schoolsite and content staff to identify the topic or topics of professional learning.** Professional learning provided pursuant to this section shall do both of the following:

- (1) Be content focused, incorporate active learning, support collaboration, use models of effective practice, provide coaching and expert support, offer feedback and reflection, and be of sustained duration.
- (2) As applicable, be aligned to the academic content standards adopted pursuant to Sections 51226, 60605, 60605.1, 60605.2, 60605.3, 60605.4, 60605.8, and 60605.11, and the model curriculum adopted pursuant to Section 51226.7, as those sections read on June 30, 2020, and former Section 60605.85, as that section read on June 30, 2014.

(d) As a condition of receiving funds apportioned pursuant to this section, a school district, county office of education, charter school, or state special school shall do both of the following:

**(1) On or before December 30, 2021, develop and adopt a plan delineating the expenditure of funds apportioned pursuant to this section, including the professional development of teachers, administrators, paraprofessionals, and classified staff. The plan shall be presented in a public meeting of the governing board of the school district, county board of education, or governing body of the charter school, before its adoption in a subsequent public meeting.**

(2) On or before September 30, 2026, report detailed expenditure information to the department, including, but not limited to, specific purchases made and the number of teachers, administrators, paraprofessional educators, or classified staff that received professional development. The department shall determine the format for this report.



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<b>Meeting Date</b>	Thursday, December 9, 2021
<b>Start Time</b>	4:15 PM
<b>End Time</b>	5:30 PM
<b>Location</b>	This meeting will be held virtually. You may join us on ZOOM at: Zoom Meeting: <a href="https://zoom.us/j/5395735793">https://zoom.us/j/5395735793</a> Meeting ID: 539 573 5793 Dial in Number: 1-669-900-6833
<b>Purpose</b>	Regular Scheduled Meeting

### Agenda

#### 1. Opening Items

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1.1. Call The Meeting To Order

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1.2. Roll Call

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1.3. Pledge Of Allegiance

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1.4. Approve Agenda

**Due date:** 12/9/2021

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1.5. Approve Minutes

**Due date:** 12/9/2021

#### Documents

- Minutes-2021-11-04-v1 (1).pdf
- 

#### 2. Curriculum Moment

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2.1. Curriculum Moment

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#### 3. Public Comments

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## 4. Consent Items

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### 4.1. Personnel Report

**Due date:** 12/9/2021

#### Documents

- Personnel Report\_Empower 11.29.2021-2 (1).pdf
- 

### 4.2. Check Register

**Due date:** 12/9/2021

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### 4.3. AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements

Request approval of required Analysis of AB 361 Emergency Legislation regarding the ability of the Board and public to meet safely in person given measures to promote social distancing.

**Due date:** 12/9/2021

#### Documents

- EG - AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements (1).pdf
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## 5. Discussion and Reports

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### 5.1. School Director Report

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### 5.2. COVID - 19 Update

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## 6. Action Items

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### 6.1. Revised 2021 - 2022 Budget Report

Request approval of the revised 2021-2022 budget based on current enrollment, revenue, and expenditures.

**Due date:** 12/9/2021

#### Documents

- EG Budget FY2122 - 1st Interim (1).pdf
- 

### 6.2. Revised IEE Procedures

Request approval of Revised IEE document to reflect changes in pricing due to current industry standards.

**Due date:** 12/9/2021

#### Documents

- Empower Generations IEE Procedures and Criteria Doc November 2021 (1).pdf
- 

### 6.3. Educator Effectiveness Plan

Request approval of the Educator Effectiveness Plan as one time staff development funding to be used through 2025-2026.

**Due date:** 12/9/2021

#### Documents

- Empower Generations 2021 Educator Effectiveness Block Grant DRAFT Plan.docx (1).pdf
- 

#### 6.4. Revised Title IX Policy

Request approval of Revised Title IX Policy recommended legal counsel based on new laws in place by the Office of Civil Rights and the U.S. Department of Education for all schools receiving federal funds.

**Due date:** 12/9/2021

##### Documents

- Empower Generations - Title IX Policy for Sexual Harassment and Grievance Procedures(5560371.1).pdf
- 

#### 6.5. Records Retention and Disposal Policy

Request approval of School Records and Disposal Policy to follow legally required and allowable storage and purge processes.

**Due date:** 12/9/2021

##### Documents

- Empower Generations - School Records Retention and Disposal Policy (2) (1).pdf
- 

#### 6.6. Learner Records Maintenance, Retention, and Destruction Policy

Request approval of Learner Records Maintenance, Retention, and Destruction Policy to follow legally required and allowable storage and purge processes.

**Due date:** 12/9/2021

##### Documents

- Empower Generations - Learner Records Retention and Destruction Policy.pdf
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### 7. Board Comments

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#### 7.1. Board Comments

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### 8. Closing Items

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#### 8.1. Board Retreat Dates

January 28 and 29 - Registration Open

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#### 8.2. Next Meeting Date - February 10, 2022

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#### 8.3. Adjournment

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*The Secretary of the Board of Directors, hereby certifies that this agenda was publicly posted 72 or 24 hours prior to the meeting as required by law.*



## MEETING MINUTES - Empower Generations Board

### Meeting

<b>Date</b>	Thursday, November 4, 2021
<b>Started</b>	4:12 PM
<b>Ended</b>	5:19 PM
<b>Location</b>	Address: 44248 10th Street West, Lancaster, CA 93534 Address: LACOE 12830 Columbia, Downey, CA 90242 Zoom Meeting: <a href="https://zoom.us/j/5395735793">https://zoom.us/j/5395735793</a> Meeting ID: 539 573 5793 Dial in Number: 1-669-900-6833
<b>Purpose</b>	Regular Scheduled Meeting
<b>Chaired by</b>	Michelle Fluke
<b>Recorder</b>	Kim Lytle

### Minutes

#### 1. Opening Items

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##### 1.1. Call The Meeting To Order

Meeting was called to order at 4:12.

**Status:** Completed

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##### 1.2. Roll Call

All Board Members Present with Marcia arriving at 4:23.

**Status:** Completed

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##### 1.3. Pledge Of Allegiance

Pledge of allegiance was recited.

**Status:** Completed

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##### 1.4. Approve Agenda

Motion: Hannah-Marie

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

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##### 1.5. Approve Minutes

Motion: Annaliisa

Second: Sharon

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- Minutes-2021-09-02-v1.pdf
  - Minutes-2021-09-09-v1 (1).pdf
- 

## 2. Public Comments

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### 2.1. Public Comments

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No public comments were made.

**Status:** Completed

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## 3. Consent Items

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### 3.1. Personnel Report

Motion: Hannah-Marie

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- Personnel Report\_Empower 10.19.2021.pdf
- 

### 3.2. Check Register

Motion: Hannah-Marie

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- EG Payment Register 20211020 (1).pdf
- 

## 4. Discussion and Reports

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### 4.1. School Director Report

David Williams, iLEAD CA Support Provider, was introduced as Interim School Director while Malaka is on leave. He gave a School Director report on behalf of Malaka about the WASC visit.

**Status:** Completed

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#### 4.2. The iDEAL Process

Matt Watson, iLEAD Support Provider, shared the iDEAL Process and answered questions of the Board.

**Status:** Completed

##### Documents

- iDEAL Tool, Rollout, & Implementation.pdf
- 

#### 4.3. Revised 2021 - 2022 Budget Report

Keith Gallion, iLEAD CA Support Provider, shared an updated budget report based on new enrollment and answered questions of the Board.

**Status:** Completed

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### 5. Action Items

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#### 5.1. 2020-2021 Unaudited Actuals

Request approval of the unaudited actuals as proposed for last schools year.

Keith Gallion, iLEAD CA Support Provider, presented the Unaudited Actuals based and answered questions of the Board.

Motion: Marcia

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

##### Documents

- EmpowerGenerations\_FY2021\_UnauditedActuals\_FinalforDistrict\_09102021.pdf
- 

#### 5.2. ESSER III Expenditure Report

Request approval of required Expenditure Plan For ESSER III one time funding based on allowable expenditures.

Lara Durrell, iCA Support Provider, presented the ESSER III plan and answered questions of the Board.

Motion: Marcia

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

##### Documents

- Empower Generations 2021-22 ESSER III Expenditure Plan DRAFT.docx.pdf
-

### 5.3. Lease Agreement

Request ratification of the lease agreement for the new location of the school.

Motion to ratify the new lease agreement: Hannah-Marie

Second: Marcia

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- 10th St Commerce - EG - EXECUTED LEASE (1) (1).pdf
- 

### 5.4. iCA and Empower Generations Arts Grant MOU and Everyday Arts Agreement

Request approval of this Art Grant MOU with iLEAD CA to allow the LA County Grant to continue an arts program again this school year.

Kim Lytle, iCA Support Provider, presented the iCA MOU and Arts Agreement and answered questions for the Board.

Motion: Sharon

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- FY2122 Empower Generations iPERFORM MOU with iCC1.pdf
  - Everyday Arts & iLEAD Empower Generations Innovation Studios 2021-2022 MOU (1).pdf
- 

### 5.5. Revised iCA Special Education MOU

Request approval of iCA Special Education with the removal of Counselors who work directly for the schools and are not a shared resource.

Amber Jones, iCA Support Provider, presented the revised iCA Sp. Ed. MOU and answered questions of the Board.

Motion: Marcia

Second: Sharon

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- 21-22 SPED RESOURCE SHARING (2).pdf
- 

### 5.6. Revised- Independent Study Policy

Request approval of required revised Independent Study Policy based on newly adopted law by the State.

Kim Lytle, iCA Support Provider, presented the revised Independent Study Policy and answered questions of the Board.

Motion: Sharon

Second: Hannah-Marie

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- Redline Empower Generations Updated Independent Study Policy(5227348.1) (1).pdf
- 

### 5.7. Equity Policy

Request approval of the Equity Policy which is required by the Federal Government due to the receipt of Federal Funding (Title I, Title II, Title IV).

Kim Lytle, iLEAD CA Support provider, presented the Equity Policy and answered questions of the Board.

Motion: Annaliisa

Second: Hannah-Marie

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- Equity Policy - Empower Generations.pdf
- 

### 5.8. Physical Education Policy

Request approval of the PE Policy which is required by the Federal Government due to the receipt of Federal Funding (Title I, Title II, Title IV)

Kim Lytle, iCA Support Provider, presented the PE Policy and answered questions of the Board.

Motion: Marcia

Second: Annaliisa

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- P.E. Policy - Empower Generations Innovation Studios.pdf
- 

### 5.9. AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements

Request approval of required Analysis of AB 361 Emergency Legislation regarding the ability of the Board and public to meet safely in person given measures to promote social distancing.

Kim Lytle, iCA Support Provider, presented the AB 361 Resolution and answered questions of the Board.



Motion: Marcia

Second: Hannah-Marie

Passed Unanimously

**Due date:**

**Status:** Completed

Documents

- EG - AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements.pdf
- 

## 6. Board Comments

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### 6.1. Board Comments

David Williams answered questions of the pending construction to the new facility.

**Status:** Completed

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## 7. Closing Items

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### 7.1. Board Retreat Dates - January 28 and 29

**Status:** Completed

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### 7.2. Next Meeting Date - December 9

**Status:** Completed

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### 7.3. School Tour

Board Members will take a tour of the new location.

School Tour was tabled.

**Status:** Completed

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### 7.4. Adjournment

Meeting adjourned at 5:19

**Status:** Completed

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**EMPLOYMENT – NEW HIRES**

N/A

**RESIGNATIONS/TERMINATIONS**

Bruno Chung - Registrar - 11/30/21

**STATUS CHANGE**

N/A

**Company Name:** Empower Generations  
**Report Name:** Payment Register  
**Report Title 2:** Mission Valley Bank  
**Footer Text:** 10/21/2021-12/01/2021  
**Created On:** 12/3/21  
**Location:** 115--Empower Generations

Date	Vendor	Method	Amount	GL account/Account label	Memo
10/22/21	SCHO009--School Pathways Holdings, LLC	EFT	1,200.00	5850--Student Services Expendi	SOW #8191-04: Development - BrightSpace Bridge
10/22/21	TIM115A--Time Warner Cable 3018	EFT	50.15	5920--Internet Services	Empower Generations- 8448 20 006 2573018
10/22/21	TRAUM000--Trauma Resource Institute	EFT	3,680.00	5240--Professional Development	EG- Training
10/22/21	ILEA300--iLEAD California	EFT	8,188.00	5801--Professional Services -	Empower- iCA Shared Service
10/22/21	ILEA300--iLEAD California	EFT	11,491.00	5852--Student Services Expendi	Empower- ICA Student Support
10/22/21	THEM001--The Moving and Storage Company	EFT	3,040.00	5630--Repairs & Maintenance -	iAD-Moving-November 2021
10/27/21	THEA008--The Abbey Company	EFT	2,000.00	5610--Rent - Facilities Rent a	Empower- November Rent
10/27/21	ARTH000--First Insurance Funding	EFT	1,744.42	9520--Payroll Liabilities	Empower Generations-4th Installment Acct# ILEASCH-02
10/27/21	ANTE012--Antelope Valley Partners for Health	EFT	1,500.00	5610--Rent - Facilities Rent a	Empower- November Rent
10/27/21	ILEA000--iLEAD Lancaster Charter Schools	EFT	10.29	4355--Facilities Supplies	Empower- Facilities Supplies
10/27/21	HESS000--Hess and Associates Inc	EFT	385.00	9535--Retirement Liability	EG- 1st quarter CAL STRS and Annual Fee
10/28/21	LOSA001--Los Angeles County Office of Education (LACOE)	Check 2557	4,543.95	9535--Retirement Liability	Empower STRS
10/29/21	PROJ001--Project WayFinder, LLC.	EFT	937.04	4120--Core Curriculum - Softwa	EG- Purpose 1, Physical & Digital
10/29/21	SCHO009--School Pathways Holdings, LLC	EFT	2,496.75	5310--Professional Dues, Membe	Empower Generations- Subscriptions
11/1/21	LEGA003--Legal Shield	EFT	31.90	3401--Health & Welfare Benefit	EE Benefits 09.21
11/1/21	LEGA003--Legal Shield	EFT	47.85	3401--Health & Welfare Benefit	EE Benefits 07.21
11/12/21	AMAZ100--Amazon Capital Services (iCA)	EFT	49.51	4340--Office Supplies	EG- Office Supplies
11/12/21	SCHO013--School Food and Wellness Group	EFT	1,000.00	5310--Professional Dues, Membe	EG- NSLP Administrative Fee
11/23/21	ARTH000--First Insurance Funding	EFT	1,744.42	5410--Liability Insurance	Empower Generations-5th Installment Acct# ILEASCH-02
11/26/21	CALI012--California School Finance Authority (CSFA)	EFT	8,405.00	5826--Operating Expenditures -	Empower Generations- September Loan Payment
11/26/21	THEA008--The Abbey Company	EFT	2,000.00	5610--Rent - Facilities Rent a	Empower- December Rent
11/26/21	ILEA300--iLEAD California	EFT	225.65	5920--Internet Services	Empower- iCA -Verizon Hotspots
11/26/21	ILEA300--iLEAD California	EFT	363.10	5240--Professional Development	Empower- iCA -Support Services
11/26/21	ILEA300--iLEAD California	EFT	262.73	5822--Operating Expenditures -	Empower- iCA -Panorama Education
11/26/21	TIM115A--Time Warner Cable 3018	EFT	740.00	5920--Internet Services	Empower Generations- 8448 20 006 2573018
11/26/21	CLIF000--Clifton Larson Allen LLP	EFT	1,050.00	5804--Professional Services -	Empower Generations- 1st progress billing for audit
11/26/21	PROC000--Procopio, Cory, Hagreaves & Savitch	EFT	1,178.00	5808--Professional Services -	EG- General Operational Legal Advice
11/26/21	AMAZ100--Amazon Capital Services (iCA)	EFT	197.31	4305--Educational Supplies (CI	EG- Classroom Supplies
11/26/21	CCSA000--California Charter School Association	EFT	1,000.00	5310--Professional Dues, Membe	Empower Generations- Membership Dues
11/26/21	MAKE000--Maker Learning Network	EFT	4,134.40	5801--Professional Services -	Empower- Monthly Service Fees
11/26/21	ILEA300--iLEAD California	EFT	1,549.20	5840--Operating Expenditures -	Empower-JAMF Software
11/26/21	MADE000--MadeToOrder, Inc	EFT	2,877.36	5831--Operating Expenditures -	Empower Generations- Branding
11/26/21	FRES001--Fresh Start Healthy Meals, Inc.	EFT	1,837.50	4710--Vended Food Service	EG- Food Service September 2021
11/26/21	PURE000--Pure Oasis Water	EFT	151.00	4340--Office Supplies	EG- Office Supplies
11/26/21	JIVE000--Jive Communications, Inc.	EFT	714.41	5910--Telephone & Fax	Empower Phone 11.01.21-11.30.21
11/30/21	LOSA001--Los Angeles County Office of Education (LACOE)	Check 2558	4,601.83	9535--Retirement Liability	Empower STRS
			\$ 75,427.77		



## **AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements Board Approved:**

Whereas, the Governor signed an Executive Order Suspending the Brown Act until October 1, 2021,

Whereas, the Governor signed Emergency Legislation AB 361 in September 2021,

Whereas, according to AB 361, the public charter school Board may take advantage of additional flexibility in teleconference meetings so long as the school complies with the following:

- The public has access via internet and/or telephone to the Board meeting and can provide public comment in some electronic form,
- The charter school uses its sound discretion and makes reasonable efforts to adhere, as closely as possible, to the other provisions of the Brown Act in order to maximize transparency and provide public access.

Whereas, AB 361 states that:

- If there is a state of emergency proclaimed by the Governor, the same suspension of teleconferencing rules apply, if either state or local officials have imposed or recommended measures to promote social distancing or, by Board vote a finding imminent risk to health or safety of attendees.

Whereas, SB 361 requires:

- The Board must provide means of how public comment will be available (internet/by phone);
- If a technical disruption occurs, no action can be taken; and
- No early requirement for public comment will be set into place and the Board shall allow for “real time” comments during full public comment period; and
- The Board makes a finding every 30 days to continue teleconferencing.

Therefore, based on the Board’s 30-day reconsideration of the current circumstances of the State of Emergency and situations of the State of Emergency continues to directly impact the ability of members to meet safely in person, and/or the State or local officials continue to impose or recommend measures to promote social distancing;

The Board has determined that it will hold its next meeting in a hybrid mode allowing Board Members and the public to attend the meetings in person using social distancing requirements or virtually given individual needs and choice of the attendee.

## EMPOWER GENERATIONS BUDGET

	Preliminary Budget	1st Interim (Revised Budget)	MYP	MYP
	FY21/22	FY21/22	FY22/23	FY23/24
<b>REVENUE</b>				
8011   State Funding - Current Year LCFF	1,299,129	978,313	1,256,395	1,420,335
8012   State Funding - EPA	21,548	16,020	22,000	25,000
8096   State Funding - Property Taxes	45,680	37,408	51,371	58,376
8181   Federal Special Education - Entitlement	11,370	10,625	9,692	13,310
8220   Federal Child Nutrition Programs	20,650	20,650	21,683	22,767
8290   Federal Revenue - All Other Federal Revenue	37,054	36,172	36,172	36,172
8291   Federal Revenue - Other Revenue	175,148	175,148	72,953	
8311   Other State Apportionments - Special Education	67,751	55,589	76,340	86,750
8312   Other State Apportionments - Special Education Mental Health	8,861	8,861	8,861	8,861
8550   State Mandated Costs	2,238	2,238	3,927	5,561
8560   State Lottery	13,350	18,263	25,080	28,500
8590   All Other State Revenues			42,881	42,881
<b>TOTAL</b>	<b>1,702,779</b>	<b>1,359,287</b>	<b>1,627,354</b>	<b>1,748,512</b>
<b>EXPENSE</b>				
<b>Credentialed Salaries</b>	<b>FY21/22</b>	<b>FY21/22</b>	<b>FY22/23</b>	<b>FY23/24</b>
1110   Credentialed Teacher Salaries				
1120   Credentialed Home Study Teacher Salaries	291,200	202,553	203,566	204,584
1130   Credentialed Education Specialist Salaries (SpEd)	70,000	65,000	65,325	65,652
1150   Credentialed Substitute Teacher Salaries		57,200	57,486	57,773
1210   Credentialed Psychologist & Counseling Services (SpEd)		17,500	17,588	17,675
1230   Credentialed Academic Counseling Salaries	71,000	17,500	17,588	17,675
1910   Credentialed Coaching & Curriculum Salaries	36,000			
<b>Total Credentialed Salaries</b>	<b>468,200</b>	<b>359,753</b>	<b>361,552</b>	<b>363,360</b>
<b>Classified Salaries</b>				
2120   Classified Classroom Aide Salaries	30,512	103,437	103,954	104,474
2210   Classified Ed Specialist Assistants & One on One Aides		93,427	93,894	94,363
2310   Classified Directors	86,920	86,920	87,355	87,791
2410   Classified Clerical, Technical, and Office Staff Salaries	31,466	16,250	16,331	16,413
2910   Classified CARE Team Yard Duty Salaries	25,003	28,600	28,743	28,887
2950   Classified Facilities/Maintenance Salaries	62,400	7,800	7,839	7,878
2990   Classified Health Office Support (Nurse)	13,500			
<b>Total Classified Salaries</b>	<b>249,801</b>	<b>336,433</b>	<b>338,115</b>	<b>339,806</b>
<b>Benefits</b>				
3101   State Teachers' Retirement System - Credentialed positions	79,219	51,192	65,079	65,405
3302   OASDI (Social Security) - Classified positions	20,155	24,405	20,963	21,068
3311   Medicare - Credentialed	6,789	5,216	5,243	5,269
3312   Medicare - Classified	4,714	4,878	4,903	4,927
3401   Health & Welfare Benefits - Credentialed positions	50,400	43,200	43,200	43,200
3402   Health & Welfare Benefits - Classified positions	61,200	64,800	64,800	64,800
3501   State Unemployment Insurance - Credentialed positions	3,038	2,604	2,604	2,604
3502   State Unemployment Insurance - Classified positions	3,689	4,774	4,774	4,774
3601   Worker Compensation Insurance - Credentialed positions	14,046	9,077	10,847	10,901
3602   Worker Compensation Insurance - Classified positions	9,752	11,809	10,143	10,194
3702   Retiree Benefits - Classified positions	19,505	24,405	20,287	20,388
<b>Total Benefits</b>	<b>272,507</b>	<b>246,361</b>	<b>252,843</b>	<b>253,530</b>
<b>Books and Supplies</b>				
4120   Core Curriculum - Software & Programs	3,000	3,000	3,000	3,000
4130   Other Curriculum	4,500	4,500	4,500	4,500
4220   Other Books & References	5,000	5,000	5,000	5,000
4305   Educational Supplies (Classroom, Project, SpEd, Etc)	9,625	9,625	9,625	9,625
4325   Custodial Supplies	5,000	5,000	5,000	5,000
4330   Health & Safety	2,500	2,500	2,500	2,500
4340   Office Supplies	2,327	2,327	2,327	2,327

4345   Printing & Reproduction Supplies	98	98	98	98
4410   Classroom Furniture & Equipment	1,500	1,500	1,500	1,500
4420   NonClassroom Furniture & Equipment	15,000	15,000	15,000	15,000
4430   IT Equipment & Supplies	13,000	13,000	13,000	13,000
4710   Vended Food Service	20,650	20,650	20,650	20,650
4720   Food Supplies	775	775	775	775
<b>Total Books and Supplies</b>	<b>82,975</b>	<b>82,975</b>	<b>82,975</b>	<b>82,975</b>
<b>Operations and Contracted Services</b>				
5210   Travel for PD, Conferences, & School Development	27,400	27,400	27,400	27,400
5220   Travel for Intersite Business - Mileage	750	750	750	750
5230   Conference & Workshop Registration Fees	4,500	4,500	4,500	4,500
5310   Professional Dues, Memberships, and Subscriptions	3,500	3,500	3,500	3,500
5410   Liability Insurance	6,682	6,682	6,682	6,682
5510   Utilities - Electricity	3,943	3,943	3,943	3,943
5520   Utilities - Gas	1,300	1,300	1,300	1,300
5560   Operations - Security	1,306	1,306	1,306	1,306
5610   Rent - Facilities Rent and CAM Charges	102,000	66,918	150,095	165,874
5630   Repairs & Maintenance - Facilities	83,500	187,903	20,000	20,000
5801   Professional Services - Service Fees	215,564	165,327	204,921	227,365
5802   Professional Services - District Oversight Fees	13,664	10,317	13,298	15,037
5803   Professional Services - Business Services	1,010	1,010	1,010	1,010
5804   Professional Services - Auditing & Tax Preparation	12,102	12,102	12,102	12,102
5805   Professional Services - Payroll Fees	6,444	6,444	6,444	6,444
5806   Professional Services - Consultant Fees	1,403	1,403	1,403	1,403
5807   Professional Services - BTSa	2,000	2,000	2,000	2,000
5808   Professional Services - Legal Fees	15,000	15,000	15,000	15,000
5822   Operating Expenditures - Licenses & Other Fees	1,941	1,941	1,941	1,941
5823   Operating Expenditures - Fingerprinting Fees	128	128	128	128
5825   Operating Expenditures - Banking Charges & Fees	3,845	3,845	3,845	3,845
5826   Operating Expenditures - Interest	1,529	1,529	1,529	1,529
5829   Operating Expenditures - Events	5,000	5,000	5,000	5,000
5830   Operating Expenditures - Marketing & Advertising	22,110	22,110	22,110	22,110
5850   Student Services Expenditures - Student Information System	10,200	10,200	10,200	10,200
5852   Student Services Expenditures - Special Education Contracted	28,647	28,647	28,647	28,647
5910   Telephone & Fax	8,393	8,393	8,393	8,393
5915   Cell Phones	606	606	606	606
5920   Internet Services	10,557	10,557	10,557	10,557
5925   Website/Communication Fees	465	465	465	465
5940   Postage Expense	94	94	94	94
<b>Total Contracted Services and Fees</b>	<b>595,582</b>	<b>611,320</b>	<b>569,168</b>	<b>609,131</b>
<b>TOTAL EXPENSE</b>	<b>1,669,065</b>	<b>1,636,842</b>	<b>1,604,653</b>	<b>1,648,802</b>
<b>NET INCOME</b>	<b>33,714</b>	<b>-277,555</b>	<b>22,701</b>	<b>99,710</b>
<b>Reserve (5%)</b>	<b>50,072</b>	<b>49,105</b>	<b>48,140</b>	<b>49,464</b>
<b><u>Enrollment and ADA Assumptions</u></b>				
Enrollment	118	89	117	123
ADA	107.4557	80.1	110	125
Grades 9-12	107	80.1	110	125
Unduplicated %	0.72	0.72	0.72	0.72
<b>Funding Factors</b>				
State - Special Educaiton Per Pupil (per ADA, current yr P-2)	650	694	694	694
Federal (- Special Education (prior yr. census)(SpEd)	125	121	121	121
Mandate Block Grant (K-8)	17.21	17.21	17.64	18.19
Mandate Block Grant (9-12)	47.84	47.84	49.03	50.55
Lottery - Unrestricted	150	163	163	163
Lottery -Restricted	49	65	65	65
STRS - ER	0.1692	0.1692	0.181	0.181



**EMPOWER GENERATIONS  
EDUCATOR EFFECTIVENESS BLOCK GRANT 2021  
EXPENDITURE PLAN**

LEA Name:	Contact Name:	Email Address:	Phone Number:
Empower Generations	Malaka Donovan, Director	malaka.donovan@empowergenerations.org	(818) 675-7500

Total amount of Educator Effectiveness funds received by the LEA:	Date of Public Meeting prior to adoption:	Date of adoption at public meeting:
\$171,522.00	12/9/21	Pending

**Describe how the LEA is coordinating Title II funds with the expenditure of Educator Effectiveness Block Grant funds to support teachers and administrators.**

Through the funds provided by the Educator Effectiveness Block Grant, Empower Generations will be able to implement a more robust professional development plan to support the growth of all learners. The LEA plans to supplement Title II funds with the Educator Effectiveness Block Grant funds to provide additional teacher and administrator training in the areas of Coaching & Mentoring, Standard-Aligned Instruction, Accelerated Learning, Social Emotional Support, Positive School Climate, Individualized Education Plans, English Learner Programs, Professional Learning Networks, Ethnic Studies, and Early Childhood Education.

Describe how the LEA allowed school site and content staff to identify the topic or topics of professional learning.

The school staff reviewed ongoing, past, and present staff development needs and plans to develop what specific training may take place using the Educator Effectiveness Block Grant according to the allowable categories and school data.

Total Expenditure FY 2022-23	Total Expenditure FY 2023-24	Total Expenditure FY 2024-25	Total Expenditure FY 2025-26	Total Budgeted Educator Effectiveness Expenditures
\$42,880.50	\$42,880.50	\$42,880.50	\$42,880.50	\$171,522.00

#### Planned Activities

1	<p><b><u>Coaching &amp; Mentoring:</u></b></p> <p>Activities may include but are not limited to: Teacher induction to clear credentials, other coaching and mentoring work, iLEAD methods, etc.</p>
2	<p><b><u>Standard-Aligned Instruction:</u></b></p> <p>Activities may include but are not limited to: Language arts, math, PBL, science, social studies, CTE curriculum pathways, iLEAD methods, dual language immersion training, data protocols, etc.</p>
3	<p><b><u>Accelerated Learning:</u></b></p> <p>Activities may include but are not limited to: AP summer institutes, IB training and certification, etc.</p>
4	<p><b><u>Social Emotional Support:</u></b></p> <p>Activities may include but are not limited to: Trauma-informed training, Leader in Me, etc.</p>
5	<p><b><u>Positive School Climate:</u></b></p> <p>Activities may include but are not limited to: Equity training, MTSS, restorative practices, 7 Habits, play-based learning, etc.</p>



6	<b><u>Individualized Education Plans:</u></b> Activities may include but are not limited to: Orton Gillingham training, special education training, etc.
7	<b><u>English Learner Programs:</u></b> Activities may include but are not limited to: EL training, etc.
8	<b><u>Professional Learning Networks:</u></b> Activities may include but are not limited to: Education conferences, required travel, and memberships such as A+, CCSA, CSDC, College Board, etc.
9	<b><u>Ethnic Studies:</u></b> Activities may include but are not limited to: Ethnic studies training, diversity, equity and inclusion training, etc.
10	<b><u>Early Childhood Education:</u></b> Activities may include but are not limited to: Early childhood education training and coursework, etc.

[EC 41480](#)

(a)(2) A school district, county office of education, charter school, or state special school may expend the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2025–26 fiscal year, inclusive. School districts, county offices of education, charter schools, and state special schools **shall coordinate the use of any federal funds received under Title II of the federal Every Student Succeeds Act of 2015 (Public Law 114–95) to support teachers and administrators with the expenditure of funds received pursuant to this subdivision.**

(b) A school district, county office of education, charter school, or state special school shall expend funds apportioned pursuant to this section to provide professional learning for **teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils**, with a focus on any of the following areas:

- (1) **Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision-making**

skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.

- (2) Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.
- (3) Practices and strategies that reengage pupils and lead to accelerated learning.
- (4) Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.
- (5) Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a schoolsite's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.
- (6) Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.
- (7) Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.
- (8) New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).
- (9) Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.
- (10) Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

(c) To ensure professional development meets educator and pupil needs, **local educational agencies are encouraged to allow schoolsite and content staff to identify the topic or topics of professional learning.** Professional learning provided pursuant to this section shall do both of the following:

- (1) Be content focused, incorporate active learning, support collaboration, use models of effective practice, provide coaching and expert support, offer feedback and reflection, and be of sustained duration.
- (2) As applicable, be aligned to the academic content standards adopted pursuant to Sections 51226, 60605, 60605.1, 60605.2, 60605.3, 60605.4, 60605.8, and 60605.11, and the model curriculum adopted pursuant to Section 51226.7, as those sections read on June 30, 2020, and former Section 60605.85, as that section read on June 30, 2014.

(d) As a condition of receiving funds apportioned pursuant to this section, a school district, county office of education, charter school, or state special school shall do both of the following:

**(1) On or before December 30, 2021, develop and adopt a plan delineating the expenditure of funds apportioned pursuant to this section, including the professional development of teachers, administrators, paraprofessionals, and classified staff. The plan shall be presented in a public meeting of the governing board of the school district, county board of education, or governing body of the charter school, before its adoption in a subsequent public meeting.**

(2) On or before September 30, 2026, report detailed expenditure information to the department, including, but not limited to, specific purchases made and the number of teachers, administrators, paraprofessional educators, or classified staff that received professional development. The department shall determine the format for this report.



## **Parent Procedures and Criteria for Obtaining an Independent Educational Evaluation**

A Parent has the right to request an Independent Educational Evaluation (IEE) at public expense when the Parent disagrees with an assessment conducted by Empower Generations in the same area. The Parent may request only one IEE for each similar assessment conducted by Empower Generations, and the assessment must have been conducted within the preceding two years. Empower Generations may either: (a) Fund the IEE or (b) Choose to initiate a due process hearing (DPH) to prove that the District's evaluation is appropriate. If the Empower Generations initiates a DPH and prevails, the Parent may still obtain an IEE, but not at public expense.

Upon request for an IEE Empower Generations shall provide information to the Parent regarding where an appropriate IEE may be obtained.; Federal and state law authorizes Districts to set criteria under which an IEE is obtained, as long as the criteria is the same as the criteria that the District uses when it initiates an evaluation, to the extent those criteria are consistent with the parent's right to an IEE. Therefore upon request the District will provide a non-exclusive list of candidates that meet the requirements. The Parent is not required to choose a provider from this list as long as the parent's chosen evaluator otherwise meets the criteria as set forth in this "Parent Procedures and Criteria for Obtaining an Independent Educational Evaluation."

Whether an IEE is funded by Parent or funded by Empower Generations it will be considered by the Individualized Education Program (IEP) team with respect to eligibility and the provision of a free appropriate public education to the Student. An IEE may be presented as evidence by either party at a DPH regarding the Student.

The District does not have an obligation to reimburse a Parent for private evaluations obtained prior to the date that Empower Generations' evaluation is completed and discussed in an IEP team meeting, or prior to the date the Parent has disagreed with Empower Generations' assessment and requested an IEE.

### **Steps for a Parent to Follow When Requesting an IEE**

1. Parent requests an IEE in writing by contacting the Principal or the Student's case carrier. The school staff may ask for Parent's reason for disagreement with the Empower Generations' assessment, but cannot require a Parent to explain their reasons as a condition for funding an IEE at public expense.
2. The Empower Generations will provide a copy of this document, the "Parent Procedures and Criteria for Obtaining an Independent Educational Evaluation" and a copy of the parent "Procedural Safeguards" to the requesting Parent.
3. Within a reasonable time, Empower Generations will provide a Prior Written Notice letter to the Parent stating whether the District will agree to fund the IEE requested.
4. If the District agrees to fund the IEE:
  - A. Parent must provide the name of the examiner. If Empower Generations does not currently have a contract



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with the examiner, Parent must provide the examiner's resume so the District may verify the qualifications, certifications and/or license of the evaluator, determine the fee rate for the IEE and whether this rate falls within Empower Generations' cost criteria, apply any other criteria as set forth in this "Parent Procedures and Criteria for Obtaining an Independent Educational Evaluation", and if approved, negotiate a contract.

- B. Parent will be provided with a Release of Information form to sign, and then Parent's contact information, along with the student's current IEP and most recent assessment, will be forwarded to the examiner. Parent will be responsible for working directly with the examiner to schedule all required appointments. The Student's case carrier will schedule an IEP team meeting following completion of the IEE.

5. If Empower Generations declines to fund the IEE because it believes its assessment to be legally sufficient, the District is required to file for DPH. Empower Generations will file for DPH within a reasonable amount of time of the request for an IEE.

### **Criteria for Obtaining an IEE at Public Expense**

#### Location Limitations for Evaluators

Evaluators must be located in the Antelope Valley area. Evaluators located outside this area will only be approved on an exceptional basis when the parent can demonstrate that there is a unique need for a specialized evaluation and that there are no qualified evaluators within the specified area who can appropriately assess their child's educational needs. Parent must obtain prior written approval in order for Empower Generations to fund an IEE from an evaluator located outside the specified geographic area. All assessments are to be completed in-person unless otherwise agreed upon prior to establishing the service agreement.

#### Minimum Qualifications for Evaluators and Reasonable Rates:

All assessments must be conducted by persons competent to perform the assessment, as determined by the criteria set forth below. Evaluations must be conducted by an examiner who holds equivalent certifications, licensure or other qualifications issued by the appropriate agency or board within the State of California and that would be required of Empower Generations staff providing similar evaluations (34 CFR Section 300.502(e)). Assessments must be conducted in accordance with requirements of federal and state law, including, but not limited to, observing the Student in the appropriate setting per EC § 56329], and conducting evaluations in accordance with EC § 56320 and EC § 56327. Evaluators must agree to release their assessment information, protocols, and written report to the Empower Generations prior to receipt of payment for services. Reports must be provided in advance of the IEP meeting and at the same time as provided to Parents. Further, assessments must be completed by Independent Evaluators who are neither employed by the Empower Generations nor have a conflict of interest in completing the assessment for the student (e.g. do not currently provide service to the student, do not recommend their own service in the assessment, do not seek to gain service from the student through the assessment). The results of the IEE that satisfies the criteria established by this "Parent Procedures for Obtaining an Independent Educational Evaluation," as well as all relevant state and federal law, will be considered in regard to eligibility discussions, program decisions, and placement of the Student. However, Empower Generations has



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no obligation to adopt the evaluator's recommendations or conclusions. Evaluations will be funded to the extent they fall within the reasonable rate for an evaluation in the selected area.

Empower Generations has determined the minimum qualifications required to conduct IEEs (EC § 56322). Evaluators with credentials other than those listed will not be approved unless the Parent can demonstrate the appropriateness of using an evaluator meeting other qualifications. Evaluators charging more than the reasonable rate range for an evaluation will not be approved and evaluations costing more than the approved range will not be funded unless the Parent can demonstrate there is an exceptional need for the assessment falling outside the reasonable range. Parent must obtain prior written approval in order for Empower Generations to fund an IEE that does not satisfy Empower Generations' minimum qualifications for evaluators and/or Empower Generations' cost containment criteria. To demonstrate this need, please contact the assessment team at [studentsupport.assessments@ileadschools.org](mailto:studentsupport.assessments@ileadschools.org).

Type of Assessment	Qualifications	Reasonable Rate Range
<u>Assistive Technology</u>	Credentialed or Licensed Certified Assistive Technology Specialist	\$500 – 1,400
<u>Auditory Processing</u>	Licensed or Certified Audiology Credentialed School Psychologist Licensed Educational or Clinical Psychologist	\$485 – 1,100
<u>Behavioral/Functional Behavior</u>	Credentialed School Psychologist Licensed Educational or Clinical Psychologist Behavior Intervention Case Manager	\$1,000-3,000
<u>Motor</u> (Occupational Therapy or Physical Therapy)	Credentialed Adaptive Physical Education Specialist Licensed Occupational Therapist Licensed Physical Therapist	\$1,500 – 2,500
<u>Psycho-Education</u> (Academic, Adaptive, Cognitive, Social Emotional, Behavior)	Credentialed School Psychologist Licensed Educational or Clinical Psychologist	\$2,500 – 5,000
<u>Speech and Language</u>	Credentialed or Licensed Speech/Language Pathologist	\$600 – 2,800





<u>Vision</u>	Credentialed Orientation and Mobility Instructor Credentialed teacher of the Visually Impaired Vision Specialist Ophthalmologist / Licensed Optometrist	\$200 – 2,000
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### **Cost Limitations**

As noted above, Empower Generations will pay a fee that is routine and reasonable for the IEE, similar to the fee for evaluations performed by qualified professionals in the Antelope Valley geographic area. The cost of a publicly funded IEE should reflect comparable industry rates within the area of expertise. Included in the total cost of the evaluation are: classroom observation, record review, administration and scoring of tests, report writing, and attendance in person or by phone at one IEP team meeting for a reasonable length of time to review the assessment results. The reasonable rate range for IEEs, as described in the chart above, was developed using an ongoing process in which evaluators specializing in different disciplines from the Antelope Valley area were contacted and an inquiry was made of each assessor regarding their fees for conducting evaluations and their opinions regarding what constitutes a reasonable fee for a particular assessment. These costs were compared, and outliers removed, to develop a maximum cost for each assessment. The data points are reflected as valid resources to consider when developing cost criteria. The cost criteria are not an average of the rates from assessors that were contacted. The cost criteria are reviewed and updated on an annual basis and Empower Generations maintains an updated list of approved assessors who satisfy Empower Generations' criteria for conducting IEEs, including cost criteria.

An assessment which costs more than the maximum amount established for that particular type of assessment in this policy will only be approved and paid for by Empower Generations if Parent can demonstrate factors that make the extraordinary costs necessary. A Parent may elect to use an assessor costing more than the approved amount without demonstrating these extraordinary factors, but Parent will be required to fund the remaining excess cost on his/her own. When insurance will cover all or part of the costs of the IEE, the Empower Generations will request that Parent voluntarily have their insurance pay those covered costs. However, Parent will not be asked to have insurance cover the IEE cost if it would result in any of the following:

1. A decrease in available lifetime coverage or any other benefit under an insurance policy;
2. An increase in premiums or the discontinuance of the policy; or
3. An out-of-pocket expense such as payment for a deductible amount.



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### **Observation**

If Empower Generations observed the Student in conducting the evaluation with which Parent disagrees, or if its assessment procedures allow in-class observations, the independent examiner, whether publicly or privately obtained, will be provided with an equivalent opportunity to observe the Student in the current educational setting and to observe Empower Generations' proposed setting, if any. To prevent unnecessary disruption in the classroom and to protect the privacy interests of other students, but provide an independent examiner an equivalent opportunity to observe the Student, observations are subject to reasonable restrictions outlined in the District Board Policy and Regulation. Reasonable restrictions include, but are not limited to, the following: (1) scheduling the observation at least 48 hours in advance; (2) identifying reasonable time limitations; (3) identifying District personnel to accompany the independent evaluator during the observation; and (4) outlining reasonable restrictions on interacting with the Student and teacher during classroom instruction.

### **Conflict of Interest**

To ensure the independence of the evaluation and any recommendations therein, the Empower Generations will not contract with an independent evaluator who is providing current ongoing services to the Student or who is seeking to provide future services to the Student. Likewise, if the independent evaluator recommends a particular service, the District, in its discretion, may not fund the service through the independent evaluator.



**Empower Generations**

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## **Title IX Policy for Sexual Harassment**

Board Approved:

Empower Generations ("School") is committed to maintaining a safe and respectful school environment that is free from discrimination and harassment. Title IX of the Education Amendment Act of 1972 ("Title IX") prohibits discrimination on the basis of sex, including sexual harassment, in the School's education programs and activities.

This Title IX Policy for Sexual Harassment ("Policy") details the School's commitment to maintain a learning environment that is free from sexual harassment and provides a grievance process for allegations of sexual harassment as defined under Title IX. Any individual can report sexual harassment at School to School staff (e.g., School Director, facilitator, etc.), and the School will take appropriate action in accordance with this Policy.

Sexual harassment is a form of gender discrimination in that it constitutes differential treatment on the basis of gender, gender identity or expression, or sexual orientation, and, for that reason, is a violation of state and federal laws and a violation of this Policy. The School considers sexual harassment to be a major offense which can result in the suspension or expulsion of learners and termination of employees.

### *Definition of Sexual Harassment Under California Law*

California Education Code section 212.5 defines sexual harassment as any unwelcome sexual advances, requests for sexual advances, requests for sexual favors, or other verbal, visual, or physical conduct of a sexual nature made by someone from or in the work or educational setting, under the following conditions:

- Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's employment, academic status, or progress.
- Submission to, or rejection of the conduct by the individual is used as the basis of employment or academic decisions affecting the individual.
- The conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment.
- Submission to, or rejection of, the conduct by the individual is used as the basis for any decisions affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

Sexual harassment may include, but is not limited to:

- Unwelcome verbal conduct such as suggestive, derogatory comments, sexual innuendoes, slurs, or unwanted sexual advances, invitations, or comments; pestering for dates; making threats; or spreading rumors about or rating others as to sexual activity or performance.
- Unwelcome visual conduct such as displays of sexually suggestive objects, pictures, posters, written material, cartoons, or drawings; graffiti of a sexual nature; or use of obscene gestures.
- Unwelcome physical conduct such as unwanted touching, pinching, kissing, patting, hugging, blocking of normal movement, assault; or interference with work or study directed at an individual because of the individual's sex, sexual orientation, or gender.
- Threats and demands or pressure to submit to sexual requests in order to keep a job or academic standing or to avoid other loss, and offers of benefits in return for sexual favors.

Under Education Code section 230, harassment and other discrimination on the basis of sex include, but are not limited to, the following: exclusion of a person or persons from participation in, denial of the benefits of, or subjection to harassment or other discrimination in, any academic, extracurricular, research, occupational training, or other program or activity; and exclusion from participation in, or denial of equivalent opportunity in, athletic programs. The full definition of discrimination and harassment based on sex from Education Code section 230 can be found here: [http://leginfo.legislature.ca.gov/faces/codes\\_displaySection.xhtml?lawCode=EDC&sectionNum=230](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=230).

The definition of sexual harassment under California law and the definition of Sexual Harassment under Title IX overlap in some areas. Complaints alleging unlawful discrimination, harassment, intimidation, or bullying based on gender, sex, gender identity or expression, or sexual orientation are eligible to be investigated pursuant to the School's Uniform Complaint Procedures. However, if any complaints alleging sexual harassment constitute Sexual Harassment as defined under Title IX (see below), the complaints shall be investigated under the Title IX Grievance Procedures for Sexual Harassment. The School prohibits retaliatory behavior against anyone who files a sexual harassment complaint or any participant in the complaint investigation process.

### *Sex Equity in Education Act Statement*

Learners have all the rights set forth in Education Code section 221.8 (as applicable to School's programs). This includes the right to fair and equitable treatment, the right to a school environment without discrimination on the basis of sex, and right to be provided with an equitable opportunity to participate in all academic extracurricular activities. The description of all rights set forth in Education Code section 221.8 can be found here: [http://leginfo.legislature.ca.gov/faces/codes\\_displaySection.xhtml?lawCode=EDC&sectionNum=221.8](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=221.8).

For more information about Gender Equity/Title IX, please visit the following CDE website: <https://www.cde.ca.gov/re/di/eo/genequitytitleix.asp>.

## **Title IX Grievance Procedures for Sexual Harassment**

### **I. Scope and Jurisdiction**

This Policy's Title IX grievance procedures apply only to conduct that falls within the definition of "Sexual Harassment" under Title IX. School employees or learners may submit formal complaints of Sexual Harassment for investigation under this Policy. Sexual Harassment under Title IX means conduct on the basis of sex that falls within one or more of the following categories:

1. A School employee conditioning the provision of a school aid, benefit, or service on an individual's participation in unwelcomed sexual conduct.
2. Unwelcomed conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the School's education program or activity.
3. Sexual assault, dating violence, domestic violence, or stalking (as those terms are defined in 34 CFR section 106.30(a)(3)).

### **II. Title IX Personnel**

The School has designated the following individuals as its Title IX Coordinators to coordinate the investigation and resolution of Sexual Harassment formal complaints as outlined in this Policy.

Title:	Empower Generations School Director/Title IX Coordinator
Address:	44248 10th Street West, Lancaster, CA 93534
Phone:	(760) 212-6160
Email:	info@empowergenerations.org

The Title IX Coordinators may designate other individual(s) to fulfill all or part of their duties. In addition to the Title IX Coordinators, the following Title IX Personnel are involved in the grievance process to address formal complaints:

- **Investigator:** The individual responsible for gathering all evidence related to the formal complaint. This individual will create an "Investigation Report" which will summarize the relevant evidence.

- **Decision-Maker:** The individual responsible for evaluating evidence in order to make a determination regarding the formal complaint. The Decision-Maker submits a written determination of findings to the parties. The Decision-Maker cannot be the Title IX Coordinator, the Investigator, or any individual involved in the investigation of the formal complaint.
- **Title IX Appeals Officer:** If applicable, this individual is responsible for evaluating an appeal of the final determination. The Title IX Appeals Officer cannot be the Title IX Coordinator, Investigator, Decision-Maker, or any individual involved in the investigation of the formal complaint.

All Title IX Personnel (i.e., the Title IX Coordinators, Investigator, Decision-Maker, Appeals Officer, and any person who facilitates an informal resolution process) will receive training in accordance with Title IX requirements. The Title IX Coordinator must ensure individuals responsible for investigating a formal complaint are neutral.

### **III. Reporting Allegations of Sexual Harassment**

Any individual (e.g., a learner or employee who is alleged to be a victim of Sexual Harassment or a parent/guardian of a learner who is alleged to be a victim of Sexual Harassment), may report Sexual Harassment directly to the School's Title IX Coordinators, or to any other available School employee who shall immediately inform a Title IX Coordinator. Reports of Sexual Harassment can be made in-person, by mail, by telephone, by electronic mail, or by any other means that result in the Title IX Coordinator receiving the person's verbal or written report.

### **IV. The School's Initial Response to a Report of Sexual Harassment**

Upon receipt of any report of Sexual Harassment, the Title IX Coordinator or designee will take the following steps. These steps are offered regardless of whether the complainant submits a formal written complaint:

1. **Contact Complainant and Determine Need for Supportive Measures:** The Title IX Coordinator will contact the complainant and respondent<sup>1</sup> to discuss the availability of supportive measures to stop the harassment, protect learners, and ensure access to the educational program. If a formal complaint was not filed, the Title IX Coordinator shall explain to complainant the right to file a formal complaint and the process for filing a formal complaint. A formal complaint is one that contains the complainant's physical or digital signature, and it may be filed at any time with the Title IX Coordinator in person, by mail, or by email. A complainant may use the attached Title IX form to submit a formal complaint to the Title IX Coordinator.
  - a. Supportive measures are nondisciplinary and nonpunitive and shall be available at any point during the Title IX investigation. Supportive measures may include, but

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<sup>1</sup> The "complainant" is the individual who is alleged to be the victim of conduct that could constitute Sexual Harassment. The "respondent" refers to the individual who has been reported to be the perpetrator of conduct that could constitute Sexual Harassment. If a parent or guardian has a legal right to act on behalf of a complainant or respondent, this right applies throughout all aspects of the Title IX matter, including the grievance process.

are not limited to: wellness check-ins, counseling services, extension of deadlines or course-related adjustments, modifications of work or class schedules, changes in work locations, or leaves of absences. The Title IX Coordinator is responsible for implementing the supportive measures.

2. Determine Need for Emergency Removal: The Title IX Coordinator will review the facts to determine whether the respondent (either learner or staff) may need to be removed from an educational program or activity to prevent any further sexual harassment and/or maintain the safety of learners and staff.
  - a. The School may determine that removal from the educational program is justified due to an immediate threat to the physical health or safety of any learner or other individual arising from the allegations. The School will conduct an individualized safety and risk analysis before the removal. The School shall provide the respondent with notice and an opportunity to challenge the decision immediately following the removal.
  - b. If the respondent is a learner, the School is subject to applicable laws and School policies regarding involuntary removals, suspensions, and expulsions.
  - c. If the respondent is an employee, the employee may be placed on administrative leave during the formal complaint investigation.
3. Consider Use of Informal Resolution Process: At any time after an informal or formal complaint has been filed, but before reaching a determination regarding the allegation, the School may offer an informal resolution process (such as a mediation) to the complainant and respondent. However, the informal resolution process is not available where the complainant alleges that an employee sexually harassed a learner.

#### **V. Initial Review of Formal Complaint:**

If a formal complaint is filed, the Title IX Coordinator will review the complaint to determine whether it raises allegations that fall within the definition of Sexual Harassment under Title IX as described above. The School may consolidate multiple formal complaints where the allegations of Sexual Harassment arise out of the same facts or circumstances.

If it does, the Title IX Coordinator will follow this Policy's grievance procedures for formal complaints. If it does not, the Title IX Coordinator will determine whether the complaint should be dismissed (as explained below) and/or investigated pursuant to another applicable School policy (e.g., Uniform Complaint Procedures).

#### **VI. Mandatory or Permissive Dismissal of Formal Complaint:**

Under certain circumstances, a complaint must or should be dismissed by the Title IX Coordinator. The Title IX Coordinator will endeavor to make this determination no more than **ten (10) calendar days** from the date they receive the formal complaint.

1. **Mandatory Dismissal:** The Title IX Coordinator must dismiss the formal complaint if they determine any of the following:
  - a. The alleged conduct would not constitute Sexual Harassment as defined under Title IX even if proved;
  - b. The alleged conduct did not occur in the School's education program or activity; or
  - c. The Alleged conduct did not occur against an individual in the United States.
2. **Permissive Dismissal:** The Title IX Coordinator may dismiss a formal complaint if they determine any of the following:
  - a. The complainant has notified the School, in writing, that they would like to withdraw the complaint or any allegations in the complaint;
  - b. The respondent is no longer enrolled in, or employed by, the School; or
  - c. Specific circumstances prevent the School from gathering evidence to reach a determination with regard to the complaint.

**Written Notice of Dismissal:** If the Title IX Coordinator dismisses the complaint, they must send written notice of the dismissal simultaneously to both parties (complainant and respondent) as follows:

- The written notice should state the reason(s) for the dismissal and inform the parties of their right to appeal in accordance with the procedures described in the "Appeals" section below.
- If the Title IX Coordinator determines another School grievance procedure (e.g., Uniform Complaint Procedures) is the appropriate grievance procedure for the complainant's allegation(s), the written notice shall inform the parties (complainant and respondent) of the School's intent to investigate the complaint through that grievance procedure.

## **VII. Title IX Grievance Procedures**

If the Title IX Coordinator does not dismiss the formal complaint, the School will initiate the following Title IX Grievance Procedures and issue a Written Decision. The School will endeavor to complete its investigation and issue a Written Decision within **sixty (60) calendar days of receipt of the formal complaint.**

### **1. Send Written Notice of Formal Complaint**

The Title IX Coordinator must provide the parties (complainant and respondent) with a Notice of Formal Complaint. The Title IX Coordinator will endeavor to provide this Notice within **ten (10) calendar days of receipt of the formal complaint.** The notice shall include: (1) a copy of

this Policy; (2) a description of the allegations potentially constituting Sexual Harassment with sufficient details known at the time; (3) a statement that the respondent is presumed not responsible for conduct and that a determination regarding responsibility is made at the conclusion of the grievance process; (4) a statement informing the parties of the opportunity to have an advisor of their choice throughout the grievance process and the ability to inspect and review evidence; and (5) a statement informing the parties that they must not knowingly make false statements or submit false information.

## 2. Investigator Conducts Investigation

The Investigator will gather and review evidence related to the allegations. This can include, but is not limited to, interviewing parties or witnesses, as well as reviewing relevant evidence. The Investigator will not require, request, or rely upon any information protected under a legally recognized privilege, unless the person holding such privilege has waived it.

Written notice of all investigative interviews or other meetings must be provided to any individual whose participation is invited or expected to be provided with sufficient time for the individual to prepare to participate. Notice must include the date, time, location, participants, and purpose of the meeting. Attendees of such meetings will have the right to be accompanied by an advisor of their choice.

## 3. Investigator Provides Parties Equal Opportunity to Review Gathered Evidence

The Investigator will provide both the complainant and respondent with an equal opportunity to review the evidence that is directly related to the allegations raised in the formal complaint. The parties will have a period of at least **10 calendar days** before the Investigative Report is provided to the parties to review the evidence, ask the Investigator additional questions, and provide or suggest additional evidence to be considered by the Investigator.

## 4. Investigator Prepares and Shares Investigative Report

The Investigator will prepare an Investigative Report summarizing the relevant evidence. The Investigative Report is not the School's final Written Decision. The Investigator will send the Investigative Report to the parties and their advisors, if any, for their review and written response at least **10 calendar days** before issuance of the Written Decision. The School will inform the parties in writing that they may submit to the Decision-Maker written, relevant questions that the parties want asked of any party or witness. The Decision-Maker is responsible for providing the responses (if any) to these questions to both parties.

## 5. Decision-Maker Issues Written Decision

The Decision-Maker will endeavor to issue the Written Decision within **sixty (60) calendar days from the receipt of the formal complaint**. The Decision-Maker will issue a Written Decision to both parties simultaneously. The Decision-Maker uses the "preponderance of evidence" standard (i.e., it is more likely than not that the respondent committed the alleged conduct). The Written Decision will include all of the following:

- a. Identification of the allegations potentially constituting Sexual Harassment.

- b. A description of the procedural steps taken by the School during the investigation process (e.g., notifications to the parties, interviews with the parties and witnesses, site visits, or methods used to gather other evidence).
- c. Findings of fact supporting the determination.
- d. Conclusions regarding the application of the School's policies to the facts.
- e. A statement of, and rationale for, the result as to each allegation, including a decision regarding responsibility, any disciplinary sanctions the School imposes on the respondent, and whether remedies designed to restore or preserve equal access to the School's educational program will be provided by the School to the complainant.
- f. The School's procedures and permissible bases for either party to appeal the decision.

#### 6. Remedies

If the School determines that the respondent engaged in Sexual Harassment, the School will provide remedies to the complainant, as appropriate. This may include supportive measures. Remedies may also include: transfer from a class; parent/learner conference(s); positive behavior support; warnings; detention; and/or formal discipline, such as suspension and expulsion. When an employee is found to have committed Sexual Harassment, the School will take appropriate disciplinary action, up to and including termination, in accordance with School policies and as permitted by law.

### VIII. **Appeals**

Either party may appeal the School's Written Decision, or its dismissal of a formal complaint or any allegation in the complaint, within **five (5) calendar days of the decision**. An appeal may be made on any of the following grounds:

- 1. A procedural irregularity affected the outcome.
- 2. New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made that could affect the outcome of the matter.
- 3. The Title IX Coordinator, Investigator(s), or Decision-Maker(s) had a conflict of interest or bias for or against complainant or respondent that affected the outcome of the matter.

Upon receipt of an appeal, the School will provide a written notification to the other party about the appeal that gives both parties a reasonable, equal opportunity to submit a written statement in support of/challenging the appeal.

The Title IX Appeals Officer (not Decision-Maker, Title IX Coordinator, or Investigator) shall issue a written decision of an appeal, including the rationale for the result, to both parties



simultaneously. The Title IX Appeals Officer will endeavor to issue their decision within **thirty (30) calendar days from the receipt of the appeal.**

#### **IX. Record Keeping**

The School will maintain for a period of seven (7) years records pertaining to Title IX Sexual Harassment allegations in accordance with 34 CFR section 106.45(b)(10), as well as all material used to train Title IX Personnel.

## Title IX Sexual Harassment Complaint Form

**Instructions:** This form can be completed by any individual who has knowledge of a sexual harassment conduct occurring within the education program or activity of Empower Generations (“School”). Please complete the information below. Should you need additional space or would like to provide documentation to support the allegations in the complaint, you can attach those to this complaint form. If you have any questions, please contact one of the School’s Title IX Coordinators listed below.

### Contact Information and Complainant’s (Victim) Information

Full Name of Person Filing the Complaint: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Complainant’s (Victim) Full Name (if different from above): \_\_\_\_\_

### Respondent’s (Accused) Information

Respondent’s Full Name: \_\_\_\_\_

Is the accused a learner? ☐ No ☐ Yes

If yes, what is the student’s grade and relation to complainant: \_\_\_\_\_

Is the accused a School staff member? ☐ No ☐ Yes

If yes, what is the staff member’s relation to the complainant (e.g., \_\_\_\_\_  
facilitator)? If no, what is the accused’s affiliation to the School? \_\_\_\_\_

### Details of Complaint

Date of the Alleged Incident(s): \_\_\_\_\_ Location of Alleged Incident(s): \_\_\_\_\_

Please describe the facts underlying your complaint. Provide details such as the names of those involved, the dates of the incident(s), whether witnesses were present and the names of any witnesses, etc. Please provide any details which you feel might be helpful to a complaint investigator.

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Did the harassment occur at School or during a School activity? If so, please describe:

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Did this incident interfere with your ability to access or participate in School programs or activities? If so, please describe:

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List the individuals involved in the relevant incident(s):

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List any witnesses to the incident(s):

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<b>Acknowledgements</b>
By submitting this form to the School's Title IX Coordinator, I wish to initiate the School's formal Title IX Grievance Procedures.
<div>Signature of Complainant</div> <div>Date</div> <div>Once you have completed this form, please submit it to the Title IX Coordinator. Empower Generations School Director/Title IX Coordinator 44248 10th Street West, Lancaster, CA 93534 (760) 212-6160 info@empowergenerations.org</div>



## **EMPOWER GENERATIONS RECORDS RETENTION AND DISPOSAL POLICY**

Board Approved:

### **I. Purpose**

Empower Generations, a public charter school operated by a nonprofit corporation (collectively referred to as the “School”), maintains records both in electronic and paper form. The purpose of this Records Retention and Disposal Policy (“Policy”) is to ensure that necessary records of the School are maintained in accordance with applicable law, and to ensure that records no longer needed by the School or that are of no value are appropriately discarded at the proper time. This Policy should aid administrators, employees, volunteers, and board members (sometimes referred to herein as “you”) in understanding their obligations in maintaining and appropriately disposing the School’s records.

### **II. School Records**

The School’s records include those produced by School’s administrators, employees, volunteers, and board members, both in electronic and paper form, when acting in the course and scope of their roles at the School. This Policy applies to all physical records generated in the course of the School’s operations, and also applies to electronic documents (including emails, text messages, instant messages) that are related to the School’s business. Electronically stored information is subject to the same retention schedule as paper documents. The retention period of electronically stored information depends on its content.

### **III. Record Retention**

The School’s Records Retention Schedule (“RRS”), attached as **Appendix A**, lists numerous categories of records, with retention periods for each. Not all records need to be retained, and records should not be retained for longer than is necessary for the proper conduct and functioning of the School.

Federal and state laws require the School to maintain certain types of records for particular periods. Failure to maintain such records could subject the School to penalties and fines, obstruct justice, affect evidence, and/or seriously harm the School’s position in a tax or litigation matter. Thus, it is important you understand and comply with this Policy. If you are uncertain about any of the procedures set forth in this Policy (e.g., what records to retain or destroy, when to do so, and for how long), it is your responsibility to seek direction from the Administrator as identified below.

### **IV. How Records are Stored**

#### Tangible Records

Tangible records are those which you must physically move to store, such as paper records (including records printed versions of electronically saved documents), photographs, and audio recordings. Active records that are retained as set forth in the RRS and need to be easily accessible may be stored at the School. Inactive tangible records that are retained as set forth in the RRS may be sent to an off-site storage facility.

#### Electronic Records

Electronic mail (“email”) that is required to be retained as set forth in the RRS should be either printed and stored as tangible records, or stored electronically. The School uses Google apps for Education (gmail) for email communications, which are then archived in Google Vault. Local files on desktops are to be stored supplied Google Drive unless IT has installed approved local backup.

## **V. Destruction/Deletion of Records**

### Tangible Records

Tangible records that are not required to be retained as set forth in the RRS should be destroyed by shredding or some other means that will render them unreadable. If you have a record that you do not know how to destroy, such as a photograph, compact disk, or tape recording, ask the advice of the Administrator.

### Electronic Records

Email records that you “delete” may remain in the School’s system. Thus, the School’s information technology (“IT”) staff or vendor may permanently remove deleted emails from the computer system that are not required to be retained as set forth in the RRS. Keep in mind, where duplicate records are involved, both/all copies should be destroyed/deleted where proper. In certain cases, a document may be maintained in both paper and electronic form. In such cases, the electronic document may be the official document and the paper version may be destroyed if permitted under the law.

## **VI. Suspension of Record Disposal in the Event of Litigation or Audit**

In the event the School is served with a document subpoena, or an employee becomes aware of a governmental investigation or audit concerning the School or any of its funding sources, or of the commencement of any litigation against or concerning the School, such employee shall inform the Administrator and any further disposal of documents shall be suspended until such time as the Administrator, with the advice of counsel, determines otherwise. The Administrator shall take such steps as is necessary to promptly inform all staff of any suspension in the further disposal of documents.

## **VII. Administration and Oversight**

The School Director (the “Administrator”) and/or his or her designee is responsible for administering and implementing this Policy, including the implementation of processes to ensure the RRS is followed.

The Administrator is also authorized to, among other things: (i) make modifications to the RRS from time to time to ensure that it complies with local, state, and federal laws; (ii) monitor local, state, and federal laws affecting records retention; (iii) annually review the records retention and disposal program; and (iv) monitor compliance with this Policy. All questions relating to document retention and/or destruction should be directed to the Administrator.

To ensure compliance with this Policy, the Administrator is responsible for the following oversight functions:

- Overseeing the implementation of this Policy.
- Ensuring that appropriate School administrators, employees, volunteers, and board members are properly informed of, understand, and can follow this Policy and the RRS.
- Ensuring the School has systems in place for proper storage of documents. This includes working with the School’s IT staff to ensure that the School maintains a secure document

management system that provides for the storage, retrieval, archiving, and destruction of the School's documents, including electronically stored information such as emails. The document management system shall be designed to comply with state and federal laws regarding security of records, records retention and destruction, and response to "litigation hold" discovery requests.

- Providing oversight of actual retention and destruction/disposal of documents, as needed.
- Suspending destruction of documents upon actual or foreseeable litigation.
- Keeping appropriate administrators, employees, volunteers, and board members apprised of changes to this Policy or the RRS.

**APPENDIX A**  
**RECORDS RETENTION SCHEDULE**

The Records Retention Schedule is organized as follows:

**SECTION TOPIC**

- A. Accounting and Finance
- B. Compliance Reports
- C. Contracts
- D. Corporate Records and Charter
- E. Correspondence and Internal Memoranda
- F. Electronic Documents
- G. Grant Records
- H. Insurance Records
- I. Legal Files and Papers
- J. Payroll Documents
- K. Pension Documents
- L. Personnel Records
- M. Property Records
- N. Tax Records
- O. Contribution Records
- P. Programs & Services Records
- Q. Fiscal Sponsor Project Records
- R. Other

**A. ACCOUNTING AND FINANCE**

<b>Record Type</b>	<b>Retention Period</b>
Accounts Payable ledgers and schedules	7 years
Accounts Receivable ledgers and schedules	7 years
Annual Audit Reports and Annual Financial Statements	Permanent
Annual Audit Records, including work papers and other documents that relate to the audit	7 years after completion of audit
Bank Statements and Records (deposit slips, canceled checks, electronic fund transfers)	7 years
Credit card records (documents showing individual's credit card number)	7 years

<b>Record Type</b>	<b>Retention Period</b>
Employee Expense Reports	7 years
General Ledgers	Permanent
Interim Financial Statements	7 years
Investment Records	7 years after sale of investment
Invoices	7 years
Notes Receivable Ledgers and Schedules	7 years
Purchase Orders	7 years
Receipts	7 years

## **B. COMPLIANCE REPORTS**

<b>Record Type</b>	<b>Retention Period</b>
CALPADS	Permanent (maintain copies of revised versions with original)
CBEDS	Permanent (maintain copies of revised versions with original)
Civil Rights Data Collection (CRDC) Survey	2 years
ConApps	Permanent (maintain copies of revised versions with original)
LCAP	Permanent (maintain copies of revised versions with original)
LEA Plans	Permanent (maintain copies of revised versions with original)
National School Lunch Program, National School Breakfast Program, Child and Adult Care Food Program Contracts and Supporting Documents (Pricing and Revenue Records)	Current plus 3 years



<b>Record Type</b>	<b>Retention Period</b>
Technology Plans (Internal)	Current
E-Rate Application Documentation	10 Years (maintain copies of revised versions with original)
Title I Plans	Permanent (maintain copies of revised versions with original)

## **C. CONTRACTS**

<b>Record Type</b>	<b>Retention Period</b>
Contracts and Key Related Correspondence (including any proposal that resulted in the contract and all other supportive documentation)	7 years after expiration or termination of the contract
Records received from a third party when performing under and related to a contract for goods or services	Records should be returned to the third party upon expiration or termination of the contract; unless prohibited by the contract or law, copies should be retained for 7 years after expiration or termination of the contract

## **D. CORPORATE RECORDS AND CHARTER**

<b>Record Type</b>	<b>Retention Period</b>
Corporate Records (e.g. agendas, agenda packets, signed minutes, corporate seals, articles of incorporation, bylaws, annual corporate reports)	Permanent
Charters	Permanent
Fixed asset records	Permanent
Licenses and Permits	Permanent (if project specific, then for project duration)

## E. CORRESPONDENCE AND INTERNAL MEMORANDA

**General Principle:** Key correspondence and internal memoranda should be retained for the same period as the document they pertain to or support. For instance, a letter pertaining to a particular contract would be retained as long as the contract (7 years after expiration). It is recommended that records that support a particular project be kept with the project and take on the retention time of that particular project file.

Correspondence or memoranda that do not pertain to documents having a prescribed retention period, or draft correspondence or memoranda, should generally be discarded sooner. These may be divided into two general categories:

1. Those pertaining to routine matters and having no significant, lasting consequences should be discarded at any time and at least *within two years*. Some examples include:
  - Routine letters and notes that require no acknowledgment or follow-up, such as notes of appreciation, congratulations, letters of transmittal, and plans for meetings.
  - Form letters that require no follow-up.
  - Letters of general inquiry and replies that complete a cycle of correspondence.
  - Letters or complaints requesting specific action that have no further value after changes are made or action taken (such as name or address change).
  - Other letters of inconsequential subject matter or that definitely close correspondence to which no further reference will be necessary.
  - Chronological correspondence files.

Please note that copies of interoffice correspondence and documents where a copy will be in the originating department file should be read and destroyed, unless that information provides reference to or direction to other documents and must be kept for project traceability.

2. Those pertaining to non-routine matters or having significant lasting consequences should generally be retained permanently.

## F. ELECTRONIC DOCUMENTS

1. **Electronic Mail:** Not all email needs to be retained, depending on the subject matter. If the content of an email requires it to be retained under any sections of this Policy, you are responsible for printing and storing the email as a tangible record, or storing the email electronically.
  - All email—from internal or external sources—may be deleted immediately by email users unless the content of the email requires it to be retained under any sections of this Policy. The length of time that an email should be retained should be based upon the content of the email and the category under the various sections of this Policy.
  - The School may archive email in Google Vault for purposes of data retention and eDiscovery purposes for up to one fiscal year beginning July 1 and ending June 30 of the year after the email was created. All emails not saved by the user and older than one fiscal school year after the year the email was created

may be deleted from the School email system, servers, backup servers, and any other electronic storage system as early as the first day of the subsequent fiscal year. The subsequent fiscal year is defined as beginning on July 1.

- Staff will strive to keep all of their email communication related to School issues.
- You will not store or transfer the School-related email on non-work-related computers except as necessary or appropriate for the School purposes.
- You will take care not to send confidential/proprietary information of the School to outside sources.

2. **Electronic Documents**, including Microsoft Office Suite and PDF files. Retention also depends on the subject matter.

- PDF documents – The length of time that a PDF file should be retained should be based upon the content of the file and the category under the various sections of this Policy.
- Text/formatted files – You will conduct annual reviews of all text/formatted files (e.g., Microsoft Word documents) and will delete all those you consider unnecessary or outdated.

3. **Web Page Files: Internet Cookies**

- All workstations: It is recommended that Internet browsers should be scheduled to delete Internet cookies once per month.

The School does not automatically delete electronic files beyond the dates specified in this Policy, but may do so at its discretion otherwise in accordance with this Policy. It is your responsibility to adhere to the guidelines specified in this Policy.

**G. GRANT RECORDS**

All records related to special grants or other funding sources will follow the specific retention requirements as stated in the grant or funding source requirements.

<b>Record Type</b>	<b>Retention Period</b>
Original grant proposal	7 years after completion of grant period
Grant agreement and subsequent modifications, if applicable	7 years after completion of grant period
All requested IRS/grantee correspondence including determination letters and “no change” in exempt status letters	7 years after completion of grant period
Final grantee reports, both financial and narrative	7 years after completion of grant period

<b>Record Type</b>	<b>Retention Period</b>
All evidence of returned grant funds	7 years after completion of grant period
All pertinent formal correspondence including opinion letters of counsel	7 years after completion of grant period
Report assessment forms	7 years after completion of grant period
Documentation relating to grantee evidence of invoices and matching or challenge grants that would support grantee compliance with the grant agreement	7 years after completion of grant period
Pre-grant inquiry forms and other documentation for expenditure responsibility grants	7 years after completion of grant period
Grantee work product produced with grant funds	7 years after completion of grant period

## **H. INSURANCE RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Annual Loss Summaries	10 years
Audits and Adjustments	3 years after final adjustment
Certificates Issued to the School	Permanent
Claims Files (including correspondence, medical records, injury documentation, etc.)	Permanent
Group Insurance Plans – Active Employees	Until Plan is amended or terminated
Group Insurance Plans – Retirees	Permanent or until 6 years after death of last eligible participant
Inspections	3 years
Insurance Policies (including expired policies)	Permanent
Journal Entry Support Data	7 years
Loss Runs	10 years
Releases and Settlements	25 years

## **I. LEGAL FILES AND PAPERS**

<b>Record Type</b>	<b>Retention Period</b>
Legal Memoranda and Opinions (including all subject matter files)	7 years after close of matter
Litigation Files	1 year after expiration of appeals or time for filing appeals
Court Orders	Permanent
Requests for Departure from Record Retention Schedule	10 years

## **J. PAYROLL DOCUMENTS**

<b>Record Type</b>	<b>Retention Period</b>
Employee Deduction Authorizations	4 years after termination
Payroll Deductions	Termination + 7 years
W-2 and W-4 Forms	Termination + 7 years
Garnishments, Assignments, Attachments	Termination + 7 years
Labor Distribution Cost Records	7 years
Payroll Registers (gross and net)	7 years
Time Cards/Sheets	4 years
Unclaimed Wage Records	6 years

## **K. PENSION DOCUMENTS**

**General Principle:** Pension documents and supporting employee data shall be kept in such a manner that can establish at all times whether or not any pension is payable to any person and if so the amount of such pension.

<b>Record Type</b>	<b>Retention Period</b>
Retirement and Pension Records	Permanent

## **L. PERSONNEL RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Commissions/Bonuses/Incentives/Awards	7 years

<b>Record Type</b>	<b>Retention Period</b>
Employer Information Reports	2 years after date of record or action (whichever is later)
Employee Earnings Records	Separation + 7 years
Employee Handbooks	Permanent
Employee Medical Records	Separation + 6 years
Employee Personnel Records (including individual attendance records, application forms, job or status change records, performance evaluations, termination papers, withholding information, garnishments, test results, training and qualification records)	6 years after separation
Employment Contracts – Individual	7 years after separation
Employment Records – Correspondence with Employment Agencies and Advertisements for Job Openings	3 years from date of hiring decision
Employment Records – All Non-Hired Applicants (including all applications and resumes whether solicited or unsolicited, results of post-offer, pre-employment physicals, results of background investigations, if any, related correspondence)	2-4 years (4 years if file contains any correspondence which might be construed as an offer)
Job Descriptions	Current + 3 years
Forms I-9	3 years after hiring, or 1 year after separation if later

## **M. PROPERTY RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Correspondence, Property Deeds, Assessments, Licenses, Rights of Way	Permanent
Original Purchase/Sale/Lease Agreement	Permanent
Property Insurance Policies	Permanent

## **N. TAX RECORDS**

**General Principle:** The School must keep books of account or records as are sufficient to establish amount of gross income, deductions, credits, or other matters required to be shown in any tax return.

These documents and records shall be kept for as long as the contents thereof may become material in the administration of federal, state, and local income, franchise, sales, and property tax laws.

<b>Record Type</b>	<b>Retention Period</b>
Tax-Exemption Documents and Related Correspondence	Permanent
Rulings and Determination Letters	Permanent
Excise Tax Records	7 years
Payroll Tax Records	7 years
Tax Bills, Receipts, Statements	7 years
Tax Returns – Income, Franchise, Property	Permanent
Sales/Use Tax Records	7 years
Annual Information Returns – Federal and State	Permanent
IRS or other Government Audit Records	Permanent

## **O. CONTRIBUTION RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Records of Contributions	7 years
Documents evidencing terms of donations	7 years

## **P. PROGRAMS AND SERVICES RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Records relating to programs run by the School	7 years from completion of program
Research & Publications	Permanent

## **Q. FISCAL SPONSOR PROJECT RECORDS**

<b>Record Type</b>	<b>Retention Period</b>
Sponsorship agreements	Permanent

## **R. OTHER**

<b>Record Type</b>	<b>Retention Period</b>
Attendance Records (absentee notes for learners and staff; attendance reports for learners and staff; and attendance cards for learners)	Retain in employee personnel or learner file (as applicable)
Consultant's Reports	2 years
Family Income Documents	Retain for same period as the document they pertain to or support
Field Trip Permission Forms	2 years (or maintain in applicable personnel or learner file)
Incidents and Investigations (including incident reports, witness interviews, and investigation notes)	3 years (or until resolution of claim if one is filed)
Material of Historical Value	Permanent
Photo Release Forms	2 years (or maintain in applicable personnel or learner file)
Policies and Procedures Manuals	Current version with relevant revision history





## **EMPOWER GENERATIONS LEARNER RECORDS MAINTENANCE, RETENTION, AND DESTRUCTION**

**Board Approved:**

### **I. Purpose**

The purpose of this Learner Records Maintenance, Retention, and Destruction Policy (“Policy”) is meant to provide Empower Generations (the “School”) details for maintaining learner records and provide appropriate guidelines for the maintaining, accessing, and disposing of learner records.

### **II. Terms and Definitions**

“Learner record” means any item of information (in handwriting, print, tape, film, computer, or other medium) directly related to an identifiable learner and maintained or required to be maintained by the School or any employee in the performance of his/her duties. Learner records are divided into the following three categories: (1) mandatory permanent learner records; (2) mandatory interim learner records; and (3) permitted learner records. Learner records do not include:

- Directory information.
- Informal notes compiled by a school officer or employee which remain in the sole possession of the maker, are used only as a personal memory aid, and are not accessible or revealed to any other person except a substitute.
- Records of any law enforcement unit of the School, subject to the provisions of Title 34 of the Code of Federal Regulations section 99.8.
- Records created or received by the School after an individual is no longer a pupil in attendance and that are not directly related to the individual’s attendance as a pupil.
- Grades on peer-graded papers before they are collected and recorded by the teacher.
- Test protocols, test instruments, and interpretative materials that do not contain the pupil’s name or other personally identifiable information (defined below).

“Mandatory permanent learner record” is a record that the School is required to maintain in perpetuity and which the School has been directed to compile by state law, regulation, or administrative directive. Such records shall include the following:

1. Legal name of pupil.
2. Date of birth.
3. Method of verification of birth date.
4. Sex of pupil.
5. Place of birth.
6. Name and address of parent of minor pupil.
  - a. Address of minor pupil if different than the above.
  - b. An annual verification of the name and address of the parent and the residence of the pupil.

7. Entering and leaving date of each school year and for any summer session or other extra session.
8. Subjects taken during each year, half-year, summer session, or quarter.
9. If marks or credit are given, the mark or number of credits toward graduation allows for work taken.
10. Verification of or exemption from required immunizations.
11. Date of high school graduation or equivalent.
12. All records pertaining to any accident or injury involving a minor for which a claim for damages has been filed as required by law, including any policy of liability insurance relating thereto, except that these records cease to be Class – Permanent records one year after the claim has been settled or the statute of limitations has run.

“Mandatory interim learner record” is a record that the School is required to compile and maintain for a period of three (3) years after the learner leaves the School or the usefulness ceases. Such records include:

1. All agreements, including Independent Study Master Agreements and Addendums.
2. Learner assignment and work records.
3. Representative samples of completed learner work with the supervising teacher’s evaluation.
4. Teacher record of apportionment/attendance credits, grades, and other evaluations of independent study assignments.
5. A log or record identifying those persons (except authorized school personnel) or organizations requesting or receiving information from the record. The log or record shall be accessible only to the legal parent or guardian or the eligible pupil, or a dependent adult pupil, or an adult pupil, or the custodian of records.
6. Health information, including Child Health Developmental Disabilities Prevention Program verification or waiver.
7. Participation in special education programs including required tests, case studies, authorizations, and actions necessary to establish eligibility for admission or discharge.
8. Language training records.
9. Progress slips and/or notices.
10. Parental restrictions regarding access to directory information or related stipulations.
11. Parent or adult pupil rejoinders to challenged records and to disciplinary action.
12. Parental authorizations or prohibitions of pupil participation in specific programs.
13. Results of standardized tests administered within the preceding three years.

“Permitted learner record” is a record that has clear importance only to the current educational program and maintained for appropriate educational purpose. It must be kept for six (6) months after its usefulness ceases. Such records may include:

1. Objective counselor and/or teacher ratings.
2. Standardized test results older than three years.
3. Routine discipline data.
4. Verified reports of relevant behavioral patterns.
5. All disciplinary notices.

6. Attendance records not covered in the Administrative Code Section 400.

“Personally identifiable information” includes, but is not limited to:

1. The student’s name.
2. The name of the student’s parent/guardian or other family members.
3. The address of the learner or student’s family.
4. A personal identifier, such as the student's social security number, learner number, or biometric record (e.g., fingerprints, retina and iris patterns, voiceprints, DNA sequence, facial characteristics, and handwriting).
5. Other indirect identifiers, such as the student's date of birth, place of birth, and mother's maiden name.
6. Other information that, alone or in combination, is linked or linkable to a specific learner that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the learner with reasonable certainty.
7. Information requested by a person who the School reasonably believes knows the identity of the learner to whom the learner record relates.

“Parent” means a natural parent, an adopted parent, legal guardian, surrogate parent, or foster parent. If the parents are divorced or legally separated, only a parent with legal custody of the pupil may challenge the content of the record, offer a written response to a record, or consent to release records to others. Either parent may grant consent if both parents have notified, in writing, the School that an agreement has been made. If a learner has attained the age of 18 years or is attending an institution of postsecondary education, the permission or consent required of, and the rights accorded to, the parents or guardian of the learner shall thereafter only be required of, and accorded to, the learner, unless the learner transfers his or her educational rights.

### **III. Maintenance, Retention, and Destruction of Learner Records**

Learner records shall be maintained in a central file at the School attended by the learner or, when records are maintained at different locations, a notation shall be placed in the central file indicating where other records may be found.

A School shall not collect or solicit social security numbers or the last four digits of social security numbers from pupils or their parents or guardians unless otherwise required to do so by state or federal law.

The School Director or designee is the designated Custodian of Records. The Custodian of Records and/or his or her designee shall be responsible for overseeing the implementation of this Policy and processing any requests for access to, or transfer of, learner records. The Custodian of Records is responsible for the security of learner records maintained by the School and for devising procedures for assuring that access to such records is limited to authorized persons.

Learner records shall be maintained consistent with the classification of the record as either mandatory permanent learner record, mandatory interim learner record, or permitted learner record. The retention period for the records shall be as follows:

- Mandatory permanent learner records: Must be maintained for an indefinite period of time.
- Mandatory interim learner records: Unless forwarded to another school, must be maintained for a period of three (3) school years after the learner leaves the School or the usefulness of the record ceases. The mandatory interim learner record may be destroyed thereafter.
- Permitted learner records: May be destroyed when their usefulness ceases. They may be destroyed six (6) months after the learner completes or withdraws from the educational program and their usefulness ceases/

Learner records may be destroyed by shredding the records or by other means to assure complete destruction and to prevent any reconstruction of the records and disclosure of any personally identifiable information.

#### **IV. Access to Learner Records**

In accordance with state and federal laws, absolute access to any learner record shall be granted to:

1. Parents/guardians of students younger than age 18 years, including the parent who is not the student's custodial parent.
2. An adult learner, or a learner under the age of 18 years who attends a postsecondary institution, in which case the learner alone shall exercise rights related to the student's records and grant consent for the release of records.
3. Parents/guardians of an adult learner with disabilities who is age 18 years or older and has been declared incompetent under state law.

In addition, as permitted by law, certain individuals or agencies may have access to particular records that are relevant to their legitimate educational interest or other legally authorized purpose.

##### Requesting Learner Records

To inspect, review, or obtain copies of learner records, authorized persons shall submit a request to the Custodian of Records. For any individual granted access based on a legitimate educational interest, the request shall specify the interest involved. Within five business days following the date of request, the authorized person shall be granted access to inspect, review, and obtain copies of learner records during regular school hours.

When required by law, a student's parent/guardian or an adult learner shall provide written, signed, and dated consent before the School discloses the learner record. If the parent/guardian or adult learner refuses to provide written consent for the release of learner information, the

School shall not release the information, unless it is otherwise subject to release based on a court order or a lawful subpoena.

### Access Logs

A log shall be maintained for each student's record which lists all persons, agencies, or organizations requesting or receiving information from the record and the legitimate educational interest of the requester. In every instance of inspection by persons who do not have assigned educational responsibility, the Custodian of Records shall make an entry in the log indicating the record inspected, the name of the person granted access, the reason access was granted, and the time and circumstances of inspection. The log shall be open to inspection only by the parent/guardian, adult learner, dependent adult learner, custodian of records, and certain state or federal officials specified in Education Code 49064.

### Duplication of Learner Records

To provide copies of any learner record, the School may charge a reasonable fee not to exceed the actual cost of providing the copies. No charge shall be made for providing up to two transcripts or up to two verifications of various records for any former learner. No charge shall be made to locate or retrieve any learner record.

## **V. Changes to Learner Records**

Only a parent/guardian having legal custody of a learner or an adult learner may challenge the content of a record or offer a written response to a record. No additions or change shall be made to a student's record after high school graduation or permanent departure, other than routine updating, unless required by law or with prior consent of the parent/guardian or adult learner.

When a former learner submits a state-issued driver's license, birth certificate, passport, social security card, court order, or other government-issued documentation demonstrating that the former student's legal name and/or gender has changed, the School shall update the former student's records to reflect the updated legal name and/or gender. Upon request by the former learner, the School shall reissue any documents conferred upon the former learner, including, but not limited to, a transcript, a high school diploma, a high school equivalency certificate, or other similar documents. The School is not required to modify records that the former learner has not requested for modification or reissuance.

The documentation provided by a former pupil demonstrating legal name or gender change may include, but need not be limited to, any of the following:

1. State-issued driver's license.
2. Birth certificate.
3. Passport.
4. Social security card.
5. Court order indicating a name change or a gender change, or both.

If the former student's name or gender is changed and the requested records are reissued, a new document shall be added to the former student's file that includes all of the following information:

1. The date of the request
2. The date the requested records were reissued to the former learner
3. A list of the records that were requested by and reissued to the former learner
4. The type of documentation, if any, provided by the former learner to demonstrate a legal change to the student's name and/or gender
5. The name of the employee who completed the request
6. The current and former names and/or genders of the learner

Any former learner who submits a request to change the legal name or gender on the student's records but is unable to provide any government-issued documentation demonstrating the legal name or gender change, may request a name or gender change through the process described in Education Code 49070.