

*Journey School  
A California Public Charter School*

*Thursday, March 27, 2025*

***REGULAR MEETING AGENDA***

***6:00 p.m.***

*At Journey School, 27102 Foxborough, Aliso Viejo, CA 92656  
(949) 448-7232 [www.journeyschool.net](http://www.journeyschool.net)*

This meeting will be live-streamed via Zoom. Join Zoom Meeting.  
<https://us06web.zoom.us/j/86025029240?pwd=3Ww1qZ3nZAbuPqWnIC6wnsvu9uqK8j.1>

Meeting ID: 860 2502 9240 Passcode: 92629  
One tap mobile +16694449171,,86025029240#,,,,\*92629# US

***BOARD MEMBERS:***

*Amy Capelle, Council President  
Melissa Dahlin, Council Vice President  
Margaret Moodian, Council Secretary  
Jeannie Lee, Board Member  
Michael Allbee, Board Treasurer*

***ADVISORY POSITIONS:***

*Parent Cabinet Advisor - Renalani Moodley  
Faculty Advisor - TBD*

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

*Journey School welcomes your participation at the school's Council meetings. The purpose of a public meeting of the Council is to conduct the affairs of Journey School in public. We are pleased that you are in attendance. To assist you in the ease of speaking/participating in our meetings, the following guidelines are provided:*

- 1. Agendas are available to audience members during the meeting and on the school website.*
- 2. "Request to Speak" cards are available for all audience members who wish to speak prior to an agenda item or under the general category of "Public Comment." "Public Comment" time is set aside for members of the audience to raise issues that are not specifically on the agenda. However, due to public meeting laws, the Council can only listen to your issue, not discuss your issue, respond in substance or take action. These presentations are limited to five (5) minutes (ten (10) minutes if a translator is needed) and total time allotted to non-agenda items will not exceed thirty (30) minutes. The Council may give direction to staff to respond to your concern.*
- 3. With regard to items that are on the agenda, you may specify that agenda item on your "Request to Speak" card and submit the card prior to an agenda item. The public comment period precedes presentations on that agenda item by staff and/or school committees, Council discussion, and deliberation. You will be given an opportunity to speak for up to five (5) minutes (ten (10) minutes if a translator is needed).*

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4. *When addressing the Council, speakers are requested to state their name and adhere to the time limits set forth.*
5. *Audience members attending a meeting virtually are required to follow the guidelines specified in points 1 through 4 with the following exception noted: In lieu of a “Request to Speak” card, an audience member may utilize the chat function to indicate their name and a request to speak under the general category of “Public Comment” or at a specific agenda item. All other comments, questions, and dialogue entered into the chat will not be entered into public record and will not be responded to/addressed.*

**Notices:** *Journey does not discriminate on the basis of disability in the admission or access to, or treatment in employment in its programs or activities. Please notify the office at (949) 448-7232 twenty-four (24) hours prior to the date of the meeting for disability accommodations necessary in order to participate. Per California Government Code section 54957.5(b), Journey shall make materials that are part of the regular agenda packet available in the office and/or on the school’s website [www.journeyschool.net](http://www.journeyschool.net), without delay and at the same time, they are distributed to the Council.*

	<b>AGENDA ITEM</b>	<b>SPONSOR</b>	<b>EST. TIME</b>
1	<b>Call to Order and Roll Call</b>	Amy Capelle	6:00
2	<b>Inspirational Passage</b>	Gavin Keller	6:05
3	<b>Approval of Agenda*</b> <i>NOTE: Order of the agenda may be changed without prior notice to the public.</i>	Amy Capelle	6:10
4	<b>PUBLIC COMMENT: Members of the public may contribute public comment.</b> <i>Reminder: See policy above for time guidelines.</i>	Amy Capelle	6:15
5	<b>CONSENT AGENDA ITEMS: Items on Consent Agenda may be approved with one motion and vote for all but without discussion. If an item is to be discussed, it is removed from the Consent Agenda and moved to an Action Item immediately following the Consent Items.</b>  <b>A. Approval of Minutes*:</b> Minutes from regular meeting February 27, 2025.  <b>B. Updates to 2024-25 Staffing Plan*:</b> Ratification of changes to the Staffing Plan to meet current needs.  <b>C. Audit Engagement with Clifton Larson Allen*:</b> Approval of audit engagement for the 24-25 school year with our existing external auditor.	Gavin Keller	6:25
6.	<b>BOARD DEVELOPMENT and OVERSIGHT (Discussion/Action):</b>  <b>A. Report out from CCSA conference</b> on items related to Board and governance.  <b>B. Report from the Alliance for Public Waldorf Education site visit and program evaluation</b>	Amy / Margaret  Shelley Kelley	6:30

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	<b>C. Strategic Plan Development</b>	Amy / Margaret	
7	<b>INFORMATION ITEMS: Reports</b>  A. <b>Financial Update*</b> : Report on February financials  B. <b>Faculty Update</b> : Update on Faculty activities  C. <b>Parent Cabinet Update</b> : Update on Parent Cabinet activities  D. <b>Administrative Update</b> : Report from School Director, including update on enrollment lottery, attrition reduction plan, TK programming, CAASPP testing, screening for reading difficulties, etc.	Larry Tamayo  TBD  Renalani Moodley  Gavin Keller	6:45
8	<b>SCHOOL OPERATIONS: Discussion/Action</b>  A. <b>Calendar and Instructional Minutes*</b> : Review of 2025-2026 school calendar and instructional minutes.  B. <b>Charter Performance Category*</b> : Review of Journey’s 2025 performance categorization completed by the CDE. This yearly classification is to be considered by CUSD for charter renewal purposes in 2028.  C. <b>Growth Model Presentation and Review of Data*</b> : Overview of CDE’s new Growth Model used in the CA Dashboard along with a review Journey’s results	Gavin Keller	7:30
9	<b>CLOSED SESSION</b>  A. <b>Pursuant to Government Code § 54956.9</b> : Regarding anticipated litigation		8:45
10	<b>Adjournment</b>	Amy Capelle	9:00

**Agenda publicly posted at Journey School on March 24, 2025, and on the school website at [www.journeyschool.net](http://www.journeyschool.net)**

*\*Items that are expected to have back up materials provided prior to or at the meeting are indicate with an asterisk. Other items may also have back up materials provided.*

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**Tuesday, February 27, 2025**

**REGULAR MEETING MINUTES - DRAFT**

**6:00 p.m.**

*At Journey School, 27102 Foxborough, Aliso Viejo, CA 92656*  
*(949) 448-7232*  
[www.journeyschool.net](http://www.journeyschool.net)

*The meeting was live streamed via Zoom at*  
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**BOARD MEMBERS:**

*Amy Capelle, Council President - PRESENT until 8:00 p.m.*  
*Melissa Dahlin, Council Vice President - PRESENT*  
*Margaret Moodian, Council Secretary - PRESENT*  
*Michael Allbee, Board Treasurer - PRESENT*  
*Jeannie Lee, Board Member - PRESENT*

**ADVISORY POSITIONS:**

*Faculty Advisor - Lindsey Ponzo - PRESENT*  
*Parent Cabinet Advisor - Renalani Moodley - PRESENT*

	<b>AGENDA ITEM</b>	<b>SPONSOR</b>
1	<b>Call to Order and Roll Call</b> - The meeting was called to order at 6:04 p.m.	Amy Capelle
2	<b>Inspirational Passage</b> - Renalani shared an inspirational passage by Emily Perl Kingsley.	Renalani Moodley
3	<b>Approval of Agenda*</b>  <i>Gavin noted that Item D from the Consent Agenda has already been approved. Melissa made a motion to approve the agenda with Consent Item D removed. Mike seconded the motion and it was unanimously approved.</i>  <b>NOTE: The order of the agenda may be changed without prior notice to the public.</b>	Amy Capelle

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4	<p><b>PUBLIC COMMENT:</b> Alicia Cordova thanked council for their governance of the school and for the Parent Advisory Committee.</p>	
5	<p><b>CONSENT AGENDA ITEMS: Items on Consent Agenda may be approved with one motion and vote for all but without discussion. If an item is to be discussed, it is removed from the Consent Agenda and moved to an Action Item immediately following the Consent Items.</b></p> <p><b>A. Approval of Minutes*:</b> Minutes from regular meeting January 22, 2025.</p> <p><b>B. 990 - Tax Exempt Returns and Filings*:</b> Approval of draft of the federal and state tax returns for Journey School for the year ended 6/30/24</p> <p><b>C. Second Interim Financial Report*:</b> Approval of second interim report, with fiscal information through January, 2025, due by March 15.</p> <p><del><b>D. Consolidated Application*:</b> Approval of ConApp reports for winter reporting cycle.</del></p> <p><b>E. Union Negotiations*:</b> Presentation of articles in the Collective Bargaining Agreement that Journey School intends to negotiate with Journey Teacher Association.</p> <p>Mike made a motion to approve the consent agenda. Melissa seconded the motion and it was unanimously approved.</p>	Amy Capelle
6.	<p><b>SCHOOL OPERATIONS: Discussion/Action</b></p> <p><b>A. 2024-2025 Local Control and Accountability Plan*:</b> Gavin shared the midyear update and review of progress towards goals, actions and expenditures. He shared updates about the Hearth, counseling and nurse office staffing, temporary Independent Study, our elementary TOSA, PEDCO work, and more. Amy asked if there's a way to document progress towards benchmarks for each grade level, and perhaps if the TOSA's could help. Gavin shared insight on what would be involved in creating that for our Waldorf curriculum. Having Earthroots and Farmer Brandon align their curriculum with science standards has improved student progress in that subject. Grades teachers have also focused on improving science instruction. Renalani asked if there is a plan to improve math scores. Gavin noted the TOSA's assistance and efforts to make sure teachers use the math curriculum provided.</p> <p><b>B. Comprehensive School Safety Plan* (CSSP):</b> Page 20 of the CSSP needs to be updated to reflect current communication technology and backup systems. Also Gavin suggests adding the additional drafts of handouts shared with board members as part of our CSSP to help parents understand our emergency plans. Renalani suggested printing the QR code on the dismissal tags. Amy suggested also creating a magnet for parents to put on their refrigerators. Jeannie made a motion to approve the CSSP with the suggested changes to page 20. Mike seconded the motion and it was unanimously approved.</p> <p><b>C. Title IX Policy*:</b> Gavin reviewed updates to the existing policy in accordance with a reversion in laws back to 2020 regulations. Margaret made a motion to approve the</p>	Gavin Keller

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	<p>Title IX Policy as amended. Melissa seconded the motion and it was unanimously approved.</p> <p>D. <b>Client Services Agreement*</b>: Gavin shared the agreement with Inclusive Learning Partners to support the Special Education department for specific IEPs and student needs. ILP will provide a behavioral technician who will work under the supervision of Journey School. Margaret made a motion to approve the client service agreement. Mike seconded the motion and it was unanimously approved.</p> <p>E. <b>Schedule of Board Meetings*</b>: Review of annual meeting dates and discussion of a possible shift of meeting dates in May and June. The meetings will be held on Tuesday, May 27th and Monday, June 16th. Margaret made a motion to approve the schedule as amended. Jeannie seconded the motion and it was unanimously approved.</p>	
7.	<p><b>BOARD DEVELOPMENT and OVERSIGHT (Discussion/Action):</b></p> <p>A. <b>California Charter School Conference</b>: Amy and Margaret will attend the conference.</p> <p>B. <b>Strategic Planning</b>: Gavin explained the process that the teachers used to contribute to the S.W.O.T. analysis and determine which areas are top priorities. Amy reviewed the plan to reconcile the analysis done by teachers, the board, and the Alliance. The group discussed each of the priority items such as facilities, assessment, staff sustainability, funding, transitional kindergarten, and specialty programming.</p> <p>C. <b>School Director Evaluation Cycle*</b>: Gavin shared his progress towards his informal goals for 2024-25.</p> <p>D. <b>Conflict of Interest Form 700</b>: Gaylen shared a reminder of the April 1st deadline for filing annual Form 700s with the County of Orange.</p>	<p>Amy Capelle</p> <p>Shelley Kelley</p> <p>Gavin Keller</p> <p>Gaylen Corbett</p>
8.	<p><b>INFORMATION ITEMS: Reports</b></p> <p>A. <b>Financial Update*</b>: Larry reported on January financials. He informed the board that Federal IDA funds of \$95k have not been confirmed by the state, so those funds have been removed from the financial report. He reviewed grants that may be received next year, but have not been approved yet. Margaret asked about federal funding. Larry indicated that Journey received approximately \$150k from federal funding.</p> <p>B. <b>Faculty Update</b>: Lindsey shared a faculty update noting how the Independent Study teachers are benefiting from each other's student assessments and using that data to fill gaps in curriculum. She shared some of the challenges that IS teachers face including parent perception of what the program offers. She noted that perhaps the school should be more clear when informing parents about the program before they enroll.</p>	<p>Larry Tamayo</p> <p>Lindsey Ponzo</p> <p>Renalani Moodley</p> <p>Lindsey Ponzo</p>

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	<p>C. <b>Parent Cabinet Update:</b> Renalani shared an update on Parent Cabinet activities including Read-a-Thon success, Journey socks, and the auction. She said parents have questions about definitions of tardiness.</p> <p>D. <b>Administrative Update:</b> Report from School Director, including an update on school events, enrollment lottery, attendance, food services and becoming a school food authority (SFA). Lindsey noted that there is interest among faculty to assist as a committee with the process of shaping next year's lunch program. Gavin would prefer to find a vendor that would serve as our SFA which would alleviate the burden of staffing and administrative duties for the school. In regards to middle school climate, Gavin and Shelley are investigating various behaviors in 7th and 8th grades, and look forward to working with students to help them understand the impacts of their behaviors, and will encourage all students to be up-standers. Part of this effort will include a middle school field trip to the Museum of Tolerance. Renalani suggested that administrators look into Executive Function on the Classroom. There will also be outreach to parents, and small group work with students who are central to the issues. A Student Growth indicator has recently been added to the CA Dashboard. Gavin shared insight on how the results for this indicator are calculated.</p>	<p>Renalani Moodley</p> <p>Gavin Keller</p>
9	<p><b>Adjournment</b> Melissa made a motion to adjourn the meeting. Jeannie seconded the motion and it was unanimously approved.</p>	<p>Mike Allbee</p>

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JOURNEY SCHOOL STAFFING PLAN 2024-25

NAME	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO/NOTES
<b>ADMINISTRATION and STUDENT SUPPORT</b>			
Gavin Keller	Executive Director	Salary/Exempt <b>BENEFITS</b>	
Shelley Kelley	Education Director	Salary/Exempt <b>BENEFITS</b>	
Amanda Simmons	Independent Study Director	0.25 FTE (.5 Teacher) Salary/Exempt <b>BENEFITS</b>	
Grace LaHatt	Office Manager and HR Specialist	Salary/Exempt <b>BENEFITS</b>	
Kris Reynolds	Admin Asst: Enrollment, Communication, After School Programs Coordinator	Salary/Exempt <b>BENEFITS</b>	
Shoon O'Neill	Admin Asst: Registrar, Attendance, Reception	Salary/Exempt <b>BENEFITS</b>	
Janet Gates	Information Technology Specialist and Office Support	Salary/Exempt <b>BENEFITS</b>	
Gaylen Corbett	Admin Assistant: Business Specialist/Accounts Payable	Salary/Exempt <b>BENEFITS</b>	
Jenny Wilkes	Admin. Assistant: School Nurse	Hourly/Non-Exempt	Substitute when needed
<b>Delaney Stelman</b>	<b>Admin Assistant: School Nurse</b>	<b>Contract with Brightstar Care</b>	
Cadence Lusinsky	Counselor	Salary/Exempt <b>BENEFITS</b>	
Emily Landrum	Counselor	FTE Salary/Exempt <b>BENEFITS</b>	New Hire
Jaime Lloyd	Receptionist/Communication Support	Hourly /Non-Exempt <b>BENEFITS</b>	



JOURNEY SCHOOL STAFFING PLAN 2024-25

Vivienne Benjamin	Social Media and Event Support	Hourly /Non-Exempt/Part time	

MAIN CLASS TEACHERS	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
April Martin	Main Class Teacher	F/T, Salary/Exempt	
Hellene Brodsky-Blake	Main Class Teacher	F/T, Salary/Exempt	
Jill Murphy	Main Class Teacher	F/T, Salary/Exempt	
Fiona Kephart	Main Class Teacher	F/T, Salary/Exempt	
Amanda Simmons	Independent Study Teacher	.5 F/T, Salary/Exempt	At employee request, reduced role to .75 FTE including admin duties
Lindsey Ponzo	Independent Study Teacher	F/T, Salary/Exempt	
Kayla Pennington	Main Class Teacher	F/T, Salary/Exempt	
Kelli Garcia	Independent Study Teacher	F/T Salary/Exempt	
Lisa O'Neill	Independent Study Teacher	F/T, Salary/Exempt	
Kelly Larson	Main Class Teacher	F/T, Salary/Exempt	
Dennis Kephart	Main Class Teacher	F/T, Salary/Exempt	
Stacy Kinney	Main Class Teacher	F/T, Salary/Exempt	
Jeannie Lee	Main Class Teacher	F/T, Salary/Exempt	
Andrew Goetz	Main Class Teacher	F/T, Salary/Exempt	

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Julia Cameron	Main Class Teacher	F/T, Salary/Exempt	
Rita Kandel	Main Class Teacher	F/T, Salary/Exempt	
Kristi Kilcollins	Main Class Teacher	F/T, Salary/Exempt	
Jennifer Tarr	Main Class Teacher	F/T, Salary/Exempt	
Chandler Boyer	Main Class Teacher	F/T, Salary/Exempt	
Paul Breazeale	Main Class Teacher	F/T, Salary/Exempt	<p>Paternity Leave—Spring Break to June</p> <p>Will not be leaving on Paternity Leave during the 24-25 school year</p>
Catherine Ji	Long Term Sub	Per Diem/Exempt	Seeking
Heather Boley	Main Class Teacher	F/T, Salary/Exempt	
Jess Johnston	Main Class Teacher	F/T, Salary/Exempt	
Katie Blacker	Main Class Teacher	F/T, Salary/Exempt	<p>Maternity Leave — Likely January through Spring Break</p> <p>Extending Maternity Leave through end of 24-25 school year</p>
Catherine Ji	Long Term Sub	Per Diem/Exempt	Will remain in 1 <sup>st</sup> grade as long term sub.
Adam Kilcollins	Main Class Teacher	F/T, Salary/Exempt	
Maisony Schendel	Main Class Teacher	F/T, Salary/Exempt	

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CERTIFICATED INSTRUCTIONAL SUPPORT	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Suzanna Bortz	Remedial Support Lower Grades	16 periods contact 5 prep <b>HOURS DEPENDENT ON TITLE I FUNDING</b>	
Erin O'Neill	Middle School Academic Specialist (TOSA)	F/T, Salary/Exempt (Teacher Salary Schedule)	
Lindsey LaFleur	Middle School Academic Specialist (TOSA)	F/T, Salary/Exempt (Teacher Salary Schedule)	
Pam Klevit	Elementary Academic Specialist (TOSA)	F/T, Salary/Exempt (Teacher Salary Schedule)	New Position/New Role for Teacher
Miscellaneous	Guest Teachers/Subs.	As needed EXEMPT	

JOURNEY SCHOOL STAFFING PLAN 2024-25

Special Education	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Caryn Kaufman	Special Education Program Specialist (Administrator)	Salary/Exempt <b>BENEFITS</b>	
Alyson Wunderlich	Education Specialist	Salary/Exempt <b>BENEFITS</b>	
Grace Stewart	Education Specialist	Salary/Exempt <b>BENEFITS</b>	
Ashley Grey	Education Specialist	Salary/Exempt <b>BENEFITS</b>	
TBD	Education Specialist	Salary/Exempt – PART TIME <b>BENEFITS</b>	Seeking (Due to Increase in # of anticipated IEPs – new enrollment)
Alyse Eckstrom	Speech Language Pathologist	Salary/Exempt <b>BENEFITS</b>	
Savannah Diasdado	Speech Language Pathologist Assistant	Salary/Exempt – PART TIME <b>BENEFITS</b>	New Hire
Dee Marzal	Occupational Therapist	Salary/Exempt – Part Time (16-20 hours)	New Hire – Started 9/23/24
Paraprofessionals	Paraprofessionals	NA – Full time (30 hours)	Contract with Strategic Kids
Lisa Ryan	School Psychologist	NA – Part Time	Contracted Service with Effectual Education
Christina Gabrielson	School Psychologist	NA – Part Time	ADDITIONAL PSYCH NEEDED DUE TO INCREASE IN SPECIAL EDUCATION NUMBERS AND RELATED ASSESSMENTS - Contracted Service with Effectual Education

JOURNEY SCHOOL STAFFING PLAN 2024-25

Kimberly Smith	School Psychologist	NA – Part Time	ADDITIONAL PSYCH NEEDED DUE TO INCREASE IN SPECIAL EDUCATION NUMBERS AND RELATED ASSESSMENTS - Contracted Service with Effectual Education
Various	Specialized Services (Vision Therapy, Audiology, Assistive Technology, etc)	NA – Part Time	Contracted Services with Effectual Education and BrightStar Care

SPECIALTY Teachers	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Lindsay Fredrickson	Festival support and music teacher mentor	20 hours for 9 weeks of school year	New Role: Music and dancing support for Mayfaire and other festivals as needed. Mentorship and training of new music teacher
Samira Kasraie	Music Teacher Grades 1-3 and 7 <sup>th</sup> /8 <sup>th</sup> music elective	16 classes 8 prep 8 hours music support in main lesson <b>BENEFITS</b>	New Hire
Brandon Wilkes	Garden Instructor	12 classes 6 prep 12 hours maintaining gardens <b>BENEFITS</b>	
Devan Steele	Strings	14 classes 7 prep 3 hours music dept. coordination	
Billy Alexander	Music Elective: Guitar	2 classes 1 prep	

## JOURNEY SCHOOL STAFFING PLAN 2024-25

Nicola Wellner	Handwork Grades 5-8	18 classes 9 prep 3 hours specialty program coordination 2 hours assisting Independent Study <b>BENEFITS</b>  50-75 hours annually to work with Parent Cabinet to plan Harvest Faire – reimbursed by PC through their general/annual contribution to the school budget.	
Amanda Hammond	Handwork Grades 1-4	18 classes 9 prep 2 hours assisting Independent Study <b>BENEFITS</b>	
Tania Marquez	Lower Grades Art Enrichment and 7 <sup>th</sup> /8 <sup>th</sup> Grade Visual Arts	16 classes 8 prep <b>BENEFITS</b>	
Joy Halverson	Games/ Movement	18 classes 9 hours prep <b>BENEFITS</b>	
TBD	<del>Games/ Movement</del>	<del>17 classes 8.5 hours prep <b>BENEFITS</b></del>	No longer funded for 2024-2025 School Year
Sergio Huerta	Temporary Games/ Movement Teacher	16 classes 8 hours prep <b>BENEFITS</b>	Temporary role assigned to current employee
Joshua Crawford	Woodwork	16 classes 8 hours prep <b>BENEFITS</b>	
Janet Caballero	Spanish (Grades 1-8)	20 classes 10 hours prep <b>BENEFITS</b>	

JOURNEY SCHOOL STAFFING PLAN 2024-25

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CLASSIFIED/INSTRUC-TIONAL SUPPORT	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Jahtziry Hernandez	Kindergarten Assistant	NON EXEMPT 25 hours per week <b>BENEFITS</b>	Potentially eligible for benefits with additional Little Acorns hours
Karen Dillingham	Kindergarten Assistant	NON EXEMPT 25 hours per week	Potentially eligible for benefits with additional Little Acorns hours
Erin Warrack	Kindergarten Assistant	NON EXEMPT 25 hours per week	Potentially eligible for benefits with additional Little Acorns hours
Isabella Ortiz	Kindergarten Assistant	NON EXEMPT 25 hours per week	Potentially eligible for benefits with additional Little Acorns hours
Summer Jones	TK Kindergarten Assistant	NON EXEMPT 25 hours per week <b>BENEFITS</b>	
Laura Valle	Kindergarten Assistant Independent Study and 1 <sup>st</sup> Grade Assistant	18 hours per week	New Hire for 24-25  3 days per week – Wildflower kindergarten
Lily Shaw	ISP First Grade Assistant	NON EXEMPT 12 hours per week	
Josiah Adams	First Grade Assistant	NON EXEMPT 30 hours per week <b>BENEFITS</b>	
Raz Allen	First Grade Assistant	NON EXEMPT 30 hours per week <b>BENEFITS</b>	
Rachel Verbeek	Violin Assistant	NON EXEMPT 16 hours per week	
Vianney Figueroa	Handwork Assistant	NON EXEMPT 16 hours per week	

## JOURNEY SCHOOL STAFFING PLAN 2024-25

Sergio Huertas	Campus Supervision and Custodial Support	NON EXEMPT 35- 11 hours per week <b>BENEFITS</b>	Reduced hours due to Games commitment
Carmen Paez	Campus Supervision Lead And Campus Support	NON EXEMPT 35 hours per week <b>BENEFITS</b>	New Hire for 24-25
Tania Marquez	SE and Behavior Support Provider (Hearth Keeper)	NON EXEMPT 12 hours per week <b>BENEFITS</b>	
Sarah Kandel	SE and Behavior Support Provider (Hearth Keeper)	NON EXEMPT 28 hours per week	
Darren Utterback	Elementary School Interventionist, Substitute Teacher, and Campus Support	NON EXEMPT 40 hours per week <b>BENEFITS</b>	
Joshua Crawford	Construction/ Maintenance	NON EXEMPT 5 hours per week <b>BENEFITS</b>	
Other Misc Campus Supervisor support: Hourly Staff	Campus Supervisor -Before School -After School -Lunch -Recess	NON EXEMPT Approximately 20-25 hours per week of paid support	
Specialty Teacher Meetings/Performances	Specialty Teachers	NON EXEMPT Approximately 8-10 hours per week of collaborative meetings	



JOURNEY SCHOOL STAFFING PLAN 2024-25

Little Acorns Staffing*	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Kris Reynolds	Coordinator	EXEMPT – Salary <b>BENEFITS</b>	Responsibilities and duties added to a current administrative assistant. Conversations are underway
Jahtziry Hernandez, Erin Warrack,	Little Acorns Leads	NON EXEMPT up to 15 hours per week*	New Role for employee in addition to assistant hours during kindergarten day
Lily Shaw, Summer Jones, Laura Valle, Issy Ortiz, Anna Whitney, Zephyr Reynolds, Viviene Benjamin	Little Acorns Assistants	NON EXEMPT up to 15 hours per week*	New Role for employee in addition to assistant hours during independent study school day
Lucas Marquez/Various	Little Acorns Assistant	15-25 hours per week	ELOP Contract with Strategic Kids

\*Little Acorns is a fee-based aftercare program for kindergarten and transitional kindergarten students. Staffing needs/scheduled hours will ultimately depend on enrollment

JOURNEY SCHOOL STAFFING PLAN 2024-25

CONTRACTORS	TITLE/GRADE	Description/Duration	OTHER INFO
ExED	Business Services	See Contract	See Contract
Earth Roots	Eco-Literacy/Gardening	See Contract	Estimate \$25,750 annually
Black Tiger	IT Consultant	Special projects and complex diagnostics	Estimate \$10,000 annually
David Bocanegra – OC Janitorial Services	Janitorial Service	See contract	Estimate \$60,000 annually
Various	Waldorf Consultants	Provide professional development opportunities and Parent Education on campus	Estimate \$7,000 annually
Effectual Education	Special Education	Psychologist, Assistive Technology, Vision/Hearing Testing, Physical Therapist, Assistive PE, Speech Language Pathologist Assistant	Estimate \$250,000
BrightStar Care	Special Education	1:1 Nurse, 1:1 Caretaker	Estimate \$85,000
BrightStar Care	School Nurse	Nurse Monday – Friday	Estimate \$35,000 for remainder of school year (January -June)
STRATEGIC KIDS	Staffing	Special Education Paraeducators/Substitutes	Estimate \$211,055 annually  Increased estimate to \$275,000 \$300,000 – more staffing needed to support increase IEP minutes and services.
STRATEGIC KIDS	Staffing	ELOP	Estimate \$180,000 annually

ADDITIONAL HOUR AGREEMENTS PER CBA	TITLE/GRADE	SALARY or CONTRACTED HOURS PER WEEK & EXEMPT STATUS	OTHER INFO
Up to 5 Main Class Teachers (Admin and mentoring services for Certification Program)	Extra Duty Stipend	Hourly Stipend per CBA	8 hours monthly EACH
1 Main Class Teacher (mentoring for new Main Class Teacher hire)	Extra Duty Stipend	Hourly Stipend per CBA	5 hours monthly TOTAL



February 26, 2025

### ***Statement of Work - Audit Services***

This agreement constitutes a statement of work ("SOW") under the master service agreement ("MSA") dated January 14, 2022, or superseding MSA, made by and between CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") and Journey School ("you," "your," or "the entity"). We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services CLA will provide for the entity as of and for the year ended June 30, 2025.

Wade McMullen is responsible for the performance of the audit engagement.

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

#### **Scope of audit services**

We will audit the financial statements of Journey School, which comprise the financial statements identified below, and the related notes to the financial statements (collectively, the "financial statements") as of and for the year ended June 30, 2025.

The statement of financial position as of June 30, 2025, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

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

#### **Nonaudit services**

We will also provide the following nonaudit services:

- Preparation of your financial statements and the related notes.
- Preparation of informational tax returns
- Preparation of adjusting journal entries, as needed.

#### **Audit objectives**

The objectives of our audit of the financial statements are to obtain reasonable assurance about whether the

financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP). Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

Our audit will be conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and the 2024-2025 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel (State Audit Guide). Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. Our audit will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion.

We will also perform procedures to enable us to express an opinion on whether the supplementary information accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

We will issue a written report upon completion of our audit of your financial statements.

We will provide an opinion (or disclaimer of opinion) on compliance with requirements described in the 2024-25 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel. The State Compliance report will include a paragraph that states that the purpose of the report over compliance is to express an opinion on compliance with the types of requirements described in the 2024-25 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting; however, that the audit does not provide a legal determination of the entity's compliance.

The state compliance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the State Audit Guide.

Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial

statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

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

It is our understanding that our auditors' report will be included in your annual report which is comprised of Local Education Agency Organization Structure and that your annual report will be issued in conjunction with the financial statement audit. Our responsibility for other information included in your annual report does not extend beyond the financial information identified in our opinion on the financial statements. We have no responsibility for determining whether such other information is properly stated and do not have an obligation to perform any procedures to corroborate other information contained in your annual report. We are required by professional standards to read the other information and consider whether a material inconsistency exists between the other information and the financial statements because the credibility of the financial statements and our auditors' report thereon may be undermined by material inconsistencies between the audited financial statements and other information. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

### **Auditor responsibilities, procedures, and limitations**

We will conduct our audit in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* and the State Audit Guide.

Those standards require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and evaluate whether audit evidence obtained is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.

- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

- Conclude, based on our evaluation of audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Management Override of Controls

- Revenue Recognition

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

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

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will

be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the State Audit Guide.

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

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

The California Department of Education and State Controller's Office requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with state statutes and regulations. Our procedures will consist of tests of transactions and other applicable procedures described in the State Audit Guide for the types of compliance requirements applicable to the entity. The purpose of these procedures will be to express an opinion on the entity's compliance with requirements applicable to the State Audit Guide.

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

### **Management responsibilities**

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

You are responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP.

Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability

to continue as a going concern for one year after the date the financial statements are available to be issued.

Management is responsible for compliance with applicable laws and regulations and the provisions of contracts and grant agreements, including compliance with state statutes, regulations, and the terms and conditions of state awards applicable to the entity's state programs. Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for state compliance and for the accuracy and completeness of that information.

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

You are responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, including amounts and disclosures, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters, and for the accuracy and completeness of that information (including information from within and outside of the general and subsidiary ledgers); (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the State Audit Guide; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence.

You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

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



Management is responsible for the preparation of other information included in your annual report. You agree to provide the final version of such information to us in a timely manner, and if possible, prior to the date of our auditors' report. If the other information included in your annual report will not be available until after the date of our auditors' report on the financial statements, you agree to provide written representations indicating that (1) the information is consistent with the financial statements, (2) the other information does not contain material misstatements, and (3) the final version of the documents will be provided to us when available, and prior to issuance of the annual report by the entity, so that we can complete the procedures required by professional standards. Management agrees to correct material inconsistencies that we may identify. You agree to include our auditors' report in any document containing financial statements that indicates that such financial statements have been audited by us.

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

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

### **Responsibilities and limitations related to nonaudit services**

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

### **Use of financial statements**

Should you decide to include or incorporate by reference these financial statements and our auditors' report(s) thereon in a future private placement or other offering of equity or debt securities, you agree that we are under no obligation to re-issue our report or provide consent for the use of our report in such a

registration or offering document. We will determine, at our sole discretion, whether we will re-issue our report or provide consent for the use of our report only after we have performed the procedures we consider necessary in the circumstances. If we decide to re-issue our report or consent to the use of our report, we will be required to perform certain procedures including, but not limited to, (a) reading other information incorporated by reference in the registration statement or other offering document and (b) subsequent event procedures. These procedures will be considered an engagement separate and distinct from our audit engagement, and we will bill you separately. If we decide to re-issue our report or consent to the use of our report, you agree that we will be included on each distribution of draft offering materials and we will receive a complete set of final documents. If we decide not to re-issue our report or decide to withhold our consent to the use of our report, you may be required to engage another firm to audit periods covered by our audit reports, and that firm will likely bill you for its services. While the successor auditor may request access to our workpapers for those periods, we are under no obligation to permit such access.

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

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

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

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

### **Engagement administration and other matters**

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

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

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to

California Department of Education, California State Controllers Office, and authorizer(s), or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies or electronic versions of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

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

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

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

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

### **Fees**

Our professional fee is \$19,500.00. We will also bill for expenses (including travel, report production, word processing, postage, internal and administrative charges, etc.) plus a technology and client support fee of five percent (5%) of all professional fees billed. This estimate is based on anticipated cooperation from your personnel and their assistance with locating requested documents and preparing requested schedules. If the requested items are not available on the dates required or are not accurate, the fees and expenses will likely be higher. Our invoices, including applicable state and local taxes, will be rendered as work progresses and are payable on presentation.

There is a ten percent withholding clause per Education Code 14505.

<b>Bill to be mailed on</b>	<b>Amount to be billed</b>
April 2025	\$6,500
September 2025	\$6,500
November 2025	\$6,500

Additional state compliance procedures related to changes to the 2024-2025 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel will be billed as out-of-scope.

**Unexpected circumstances**

We will advise you if unexpected circumstances require significant additional procedures resulting in a substantial increase in the fee estimate.

**Changes in accounting and audit standards**

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

**Agreement**

We appreciate the opportunity to provide the services described in this SOW related to the MSA. All terms and provisions of the MSA shall apply to these services. If you agree with the terms of this SOW, please sign below to indicate your acknowledgement and understanding of, and agreement with, this SOW.

Sincerely,

**CliftonLarsonAllen LLP**

**Response:**

This letter correctly sets forth the understanding of Journey School.

CLA  
CliftonLarsonAllen LLP

*Wade McMullen*

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Wade McMullen, Principal

SIGNED 3/1/2025, 2:55:53 PM PST

**Client**  
Journey School

SIGN:

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Gavin Keller

DATE:



Date: February 5, 2025

### ***Statement of Work - Tax Exempt Returns and Filings***

This agreement constitutes a statement of work (“SOW”) under the master service agreement (“MSA”) dated January 14, 2022, or any superseding MSA, made by and between CliftonLarsonAllen LLP (“CLA,” “we,” “us,” and “our”) and Journey School (“you,” “your,” or “the organization”). The purpose of this SOW is to confirm our understanding of the scope of services, responsibilities, limitations, and related terms of our engagement for the year ended June 30, 2025.

#### **Our responsibility to you**

We will prepare the entity's federal and state returns and filings as defined herein in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible.

We will not audit or otherwise verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

#### **Your responsibilities**

It is your responsibility to provide us with all of the information needed to prepare complete and accurate returns and filings. We will have no obligation to prepare the returns and filings until you have provided such information to us. It is your responsibility to comply with all foreign jurisdiction filing requirements. We have no obligation to prepare returns for foreign jurisdictions.

CLA requires that you provide information 60 days prior to the filing deadline. If you provide information after that date, we may be unable to complete the return(s) by the original filing deadline and may need to file an extension. If an extension is filed and information is not provided by 60 days prior to the extended filing deadline, we may be unable to complete your return(s) by the extended due date. Failure to timely file your return(s) or to file for an extension can result in penalties which can be substantial.

The United States Supreme Court ruled in *South Dakota versus Wayfair* that physical presence is no longer required to establish nexus for sales tax. This ruling may have broad implications, even beyond sales tax, as to where an entity is subject to tax. Please note that if the entity had a taxable presence in more than one jurisdiction, such as an employee or agent within the jurisdiction, any tangible property owned or rented within the jurisdiction, or if the entity exceeds any applicable economic nexus thresholds, the entity, its owners, or related entities may be subject to state or local income, sales, use, franchise, or gross receipts tax in that jurisdiction depending upon the particular facts. It is the entity's responsibility, not CLA's, to

determine if assistance is needed in deciding whether the entity, its owners, or related entities may be liable for income, sales, use, franchise, or gross receipts tax, or have a filing requirement in the various state or local jurisdictions.

It is important for you to identify any ownership OR signature authority over a foreign bank account or other foreign financial assets which includes but is not limited to foreign: stocks, mutual funds, partnerships, bonds, retirement accounts, estates, trusts, annuities, swaps, and derivatives. Failure to disclose penalties can be significant, starting at \$10,000 and can be upwards of 50 percent of the value of the asset. Please provide account statements if you have any foreign account ownership or signature authority. Note that these rules do not apply to foreign investments held by U.S. mutual funds. In addition, ownership in a foreign business entity (association, corporation, disregarded entity, or partnership) could trigger additional U.S. foreign informational reporting requirements. These reporting requirements require the disclosure of ownership, financial information, and related-party transactions. Failure to properly disclose ownership, related-party transactions, and the required information could trigger a penalty of up to \$25,000 penalty per filing. We cannot be held responsible if you fail to identify or provide such information to us.

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

### **Section 174 capitalization requirement**

For tax years beginning after December 31, 2021, research and experimental (“R&E”) expenditures under IRC Section 174 are required to be capitalized and amortized. In the case of domestic R&E expenditures, the amortization period is 5 years, and in the case of foreign R&E expenditures the amortization period is 15 years. In order to comply with the law, your R&E expenditures under Section 174 must be identified and properly categorized. Should an accounting method change requiring a Form 3115 or equivalent statement be required, a separate Statement of Work for these services will be required.

### **Beneficial ownership information reporting**

Beginning in 2024 under the Corporate Transparency Act (CTA), certain entities organized in the U.S. (including entities that are disregarded for federal income tax purposes) and foreign entities doing business in the U.S. are required to report information to the Financial Crimes Enforcement Network (FinCEN) as to their beneficial ownership. The report must provide each beneficial owner, each company applicant and other required information. Entities subject to the beneficial ownership information (BOI) reporting include a corporation, limited liability company, or any other entity created by the filing of a document with the secretary of state or similar office under state, Tribal or foreign country law. Note that some entities are exempt from the BOI reporting requirements (including many nonprofits and certain large operating

companies).

**It is your responsibility to prepare and submit any BOI report to FinCEN that is required under the CTA.** We have no obligation to identify any filing requirements or provide any services related to BOI reporting.

### **Tax examinations**

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

### **Record retention**

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

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

In preparing the returns and filings, we rely on your representation that you understand and have complied with these documentation requirements. You are responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets, and for the substantial accuracy of your financial records.

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

### **Tax consulting services**

This statement of work also covers tax consulting services that may arise for which you seek our consultation and advice, both written and oral, that are not the subject of a separate statement of work. These additional services are not included in our fees for the preparation of the federal and state returns and filings. Our fee for such services will be billed to you, along with any direct costs.

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



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

<b>Tax Compliance Services or Form Description</b>	<b>Fee Detail</b>
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IRS Form 990 – Return of Organization Exempt from Income Tax	\$4,000
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Our customary billing practice is to invoice up to 50% of the estimated professional services fees upon receipt of your tax return information, or upon the preparation of an application for an extension of time to file your tax return(s) if earlier. We will continue to periodically bill for our time as work progresses.

Our professional fee reflects that, if needed, CLA will provide you with first and second drafts of each return or filing. Additional drafts requested by you may result in additional professional fees.

Additional charges may apply if you request a paper copy of your return(s), your circumstances are complex, changes to the tax law occur, or unexpected circumstances require additional time. We may apply a 20% surcharge (based on prior year invoice) if you do not provide accurate and complete tax information at least 60 days prior to the extended federal filing deadline, and an additional 5% surcharge for each and every two-week period thereafter until accurate and complete tax information is provided.

We will bill for all expenses (including internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees. Our invoices, including applicable state and local taxes, are payable on presentation.

### **Termination of agreement**

Either party (you or CLA) may terminate this SOW at any time by giving written notice to the other party. In that event, the provisions of this SOW and the MSA shall continue to apply to all services rendered prior to termination.

### **Agreement**

We appreciate the opportunity to provide the services described in this SOW related to the MSA. All terms and provisions of the MSA shall apply to these services. If you agree with the terms of this SOW, please sign below to indicate your acknowledgement and understanding of, and agreement with, this SOW.

### **CliftonLarsonAllen LLP**

McMullen, Wade

Principal

wade.mcmullen@claconnect.com

**Accepted on behalf of:**

**CLA**  
CliftonLarsonAllen LLP

*Wade McMullen*

---

McMullen, Wade, Principal

**SIGNED** 3/21/2025, 5:14:26 PM PDT

**Client**  
Journey School

SIGN:

---

Gavin Keller

DATE:

# ***Journey Public Charter School***

## **Site Visit Report**

**November 13-14, 2024**

Submitted by:

**Kimberly Telfer-Radzat, PhD - Principal and Pedagogical Chair**

**Shivani Burrows-Goodwill, Ed.D. - Co-Director, Waldorf Institute of Southern California.**

**Nanci Powers, Ed.D. - Lead Teacher, Mariposa School of Global Education**

Submitted to

**Alliance for Public Waldorf Education**

**November, 2024**

**Primary Contact: Liz Beaven, Executive Director, Alliance for Public Waldorf Education**

**[president@allianceforpublicwaldorfeducation.org](mailto:president@allianceforpublicwaldorfeducation.org)**

**Phone (916) 402-7542**

**cc. Gavin Keller Director, Journey Public Charter School**

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## Disclaimer: Limitations on the Distribution, Use , and Scope of this Document

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This report is intended for use by the school. Appropriate use includes release to the larger school community, if done so in an accurate and balanced manner. The report is not written for the purpose of providing a public relations document. If a school uses the report in a manner that misrepresents or distorts its contents or purpose, the school will be subject to corrective action by the Alliance.

The charge of the Alliance visiting team was to determine the actual situation as it existed in the school, its program and its procedures, and not to pass judgment on the professional personnel involved. Hence, this report is an objective description of circumstances as they appeared to trained and experienced educators. Any use of this report as an official assessment of a staff person's professional competency would be in violation of the professional ethics under which a school peer review is conducted.

Any matters relating to safety issues should be addressed as soon as is feasible: While the Alliance team may comment on conditions related to safety, the report is not to be construed as substituting for periodic inspections of the facilities as required by law and by principles of good practice in risk management gleaned from professional counsel to the school.

The members of the visiting team voluntarily reflected their professional judgment in arriving at the conclusions reported in this document. They are willing to support the thoughtful evaluations that they have made, provided the report is used appropriately. They are not to be held accountable for injudicious or unauthorized use of this document.

## Introduction

Journey School is situated in a beautiful valley in the city of Aliso Viejo in southern Orange County surrounded by trees and nature trails. We were welcomed by Shelley Kelley, the Pedagogical Director and shown to her office where we were to work, and given a brief overview of what to expect for the day. On both mornings of our visit, approximately 15 faculty members gathered at 8:15 on the quad to share the weekly Calendar of the Soul verse together. Everyone was very welcoming and friendly. The children arriving on campus appeared eager and happy to be there.

The school consists of portable buildings arranged in a corridor format, moving from the TK/kindergartens up to the 8th grade. Each is posted with the grade and name of the teacher, painted in various colors and script, with a set of lunch tables in front. Teachers, parents and students gave us a kind hello or warm smile. We had our own room to work out of and the opportunity to interact with various community and school groups during our two day visit.

In the past these visits have been scheduled over three days. However, Alliance is trying out a new model that includes a shorter, two-day visit. We arrived Wednesday morning which happened to be a minimum day on which no specialty classes were scheduled. This worked out because it allowed us to meet with the Parent Cabinet on their regularly scheduled meeting day *and* attend a faculty meeting.

Unfortunately, the faculty meeting happened to be a scheduled baby shower. While we did not get to see the workings of the faculty meeting, we did have the chance to observe the collegiality of the school community. Earlier in the day, everyone knew to expect us and opened their classrooms for observations willingly. Although it was just two days, we saw every classroom, met with 7 members of the parent cabinet, 7 specialty teachers, 4 Special Education teachers, observed the 6th grade play practice and several math track lessons, visited with the school administration, as well as a delightful group of 6th, 7th and 8th graders. In the evening we met via Zoom with 3 of the 5 board members.

Journey School appears to be a vibrant community which has rebounded from the challenging years of the pandemic in enrollment and stability of teaching staff. The Board wants to focus discussions on, perhaps, someday owning their own site. This year they are transitioning from district led special education services to contracting services on their own. They have a *very* large SpEd population at the moment that the new team is evaluating. From our discussions, it seems that this has been a positive move for students, parents, and faculty alike.

As a long established school, Journey has grown significantly in the past 8 years, moving from a single track to double tracking in grades 1 - 8. The kindergarten currently fills 5 classrooms, one of which is reserved for the youngest of the TK students. There is concern around how this will work with the developmental understanding of school readiness in the face of state mandates which allow for only 2 years of kindergarten. In addition, they offer both an independent study hybrid and homeschool program. During our visit, there was never a doubt that the school believes strongly in the core principles of Waldorf education. This report reflects the many overlapping areas such as human relationships, working with children, the collaboration, that were all present in single encounters. All members of the faculty believe in the school and its mission wholeheartedly.

Enrollment: 615, TK - 8, + independent study (hybrid & homeschooled included)

Journey's Charter is approved until June 30, 2028 by the Capistrano School District. They are in their 25th year of existence.

The Visiting Team thanks the Journey school community, employees, and leadership for their warm welcome.

### **Mission and History**

Our vision is to develop balanced, successful, socially responsible and contributing community members by introducing a high quality choice in public education using Waldorf-inspired methods, a well-rounded and proven curriculum addressing the needs of the whole child.

### **Core Principle #1 Image of the Human Being**

*Public Waldorf education is founded on a coherent image of the developing human being as a developing spiritual being.*

#### **From the School's Self Study:**

*"All main class teachers at Journey School have gone through Waldorf teacher training and have an understanding of the developing human being, how the development of the bodies relates to seven year cycles and what body the teacher teaches from in order to enhance development of the child."*

<b>Strengths</b>	<b>Challenges</b>
<ul style="list-style-type: none"><li>● We have a strong administrative staff and low teacher turn-over</li><li>● The Hearth is a unique innovation that Journey created for student support</li><li>● The Care Streams and Child Study help students in need of support</li><li>● We have a number of fully Waldorf trained experienced teachers who serve on the The Pedagogical Committee</li><li>● Parent Cabinet focuses fundraising efforts to support Waldorf principles</li><li>● The Peace Path helps students work through conflicts</li></ul>	<ul style="list-style-type: none"><li>● Lack of opportunities for parent education and parental understanding of Waldorf Pedagogy</li><li>● Ongoing disconnect between Speciality teachers and Main Class teachers</li><li>● Technology use by students at home is high</li><li>● Inconsistent knowledge base in the faculty of an Anthroposophical understanding of the developing Human Being</li><li>● Low attendance at parent education (online and in person)</li></ul>

## **Innovation**

- The school has maintained many specialty classes throughout its existence in subjects that have been omitted by other public schools. The Council and Administration make sure to include ample funding for specialties in the budget.
- The Hearth is a unique space in the garden, staffed throughout the day. The Hearth offers students a place to go for a break from class, to work, to do activities and helps them find some calm.
- The Peace Path helps students work through conflicts
- Care Streams and Child Study help students in need of support
- Parent Cabinet focuses fundraising efforts to support Waldorf principles
- The Pedagogical Committee provides the school with experienced Waldorf pedagogical guidance
- Journey School Council provides a broader worldview to guide the school
- Journey presents and participates in a schoolwide seasonal assemblies
- Journey students participate in grade specific Waldorf school gatherings with other private and charter Waldorf schools from across Southern California.
- There is ongoing financial assistance for our on site teacher training program

## **Site Visit Team Summary: Core Principle #1 Image of the Human Being**

**Snapshots:** The school's commitment to the care of each individual child was evident both in and out of the classrooms through the warm relationships the team observed between teachers and students at all levels. This was corroborated by leaders of the Parent Cabinet, several of them long-time parents, as one of the primary reasons for choosing and remaining with the school. The team observed individual students spending time in the **Hearth** garden area (part of the Care Stream), which has been created to restore calmness and provide supportive redirection before a child returns to class.

- The Parent Cabinet conducted their monthly meeting with 35 attending, some with babies in arms, all engaged in the planning of festivals and fundraising, to support teacher development, among other goals.
- A large circle of faculty meet before school in a central area to share Calendar of the Soul verse in several versions to set a reflective tone for the day
- All kindergarten rooms offer a warm and aesthetic environment, yet designed to meet the practical needs and rhythmic flow of the play-based program, with areas and materials for imaginative play, for circle and storytime, and food preparation.
- Kindergarten classes are at outside play simultaneously and are easily recognized by their class hat color. The one, exclusively TK class, has its own outside play time and area.
- Seasonal art, crafts and decor in each kindergarten room surrounded the children, as they sang seasonal songs.
- The team observed the flow of communication and follow-up between teachers, Care Stream staff and the Pedagogical Director around individual student needs, to be prompt and effective.



- The Pedagogical Council (PedCo) consisting of four experienced and fully Waldorf trained teachers meet weekly to confer on guiding teachers less experienced in Waldorf pedagogy.
- PedCo teachers shared the rationale for the 3-year, part-time, in-house training they had provided for newer staff, ending 2024. They sought to accommodate the needs of working teachers with an integrated schedule (Saturdays and weekday afternoons), on the school site, to eliminate extra travel, and to foster collegiality by engaging the faculty as a cohort.
- Teachers of the PedCo expressed the logistical challenges in following up with mentoring and peer support among teachers. Time is needed to observe in other classrooms, and there is a shortage of qualified substitute teachers to relieve mentor teachers to be able to do this.
- In meeting the child via hands, heart and head, the school maintains a strong, skilled team of subject teachers in: handwork; movement/spatial dynamics; woodwork; gardening; and Spanish. None of the teachers are credentialed and this seems to be ok with the authorizing district.
- Despite the discrepancies in access to meetings and professional development by the team of subject teachers, they all shared a decisive enthusiasm and commitment to the school based on its philosophy and the overall sense of community.
- The campus is adjacent to a wetlands area. Both grade 5 classes spent a day working with the *EarthRoots* Aliso Creek restoration project, followed up by relevant botany study in class.
- The school acknowledges the need to support the specialty staff so that they can afford to attend faculty meetings and professional development and bridge the communication gap. (see *Action Plan: Minor Priorities*)
- In most grades classrooms student artwork was on display. The team observed morning lessons included singing, some movement, story retelling and, in the middle grades, students creating their own written versions in the main lesson books.

## **Core Principle #2 Child Development**

*An understanding of child development guides all aspects of the educational program, to the greatest extent possible within established legal mandates.*

### **From the School’s Self Study:**

*“Journey School has taken up the challenge of aligning Steiner’s developmental curriculum and pedagogical understandings with state mandated Common Core Standards. We developed training programs and have integrated art, music, nature studies, gardening and cooking classes into the curriculum. One of the challenges facing Journey School is re-defining our Educational Support Program to align with our understanding of human development and still meet state and federal guidelines.”*

<b>Strengths</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>● On-site Waldorf teacher foundations</li> </ul>	<ul style="list-style-type: none"> <li>● Special Education program and Waldorf</li> </ul>

<p>training</p> <ul style="list-style-type: none"> <li>● We have a coaligned curriculum/sequence per our charter to meet developmental readiness.</li> <li>● Class field Trips are now consistent across the grades</li> <li>● Special Education department and reading interventionist</li> <li>● Utilization of experts in middle school</li> <li>● Curriculum presentation (TOSA, Teachers on Special Assignment)</li> </ul>	<p>pedagogy are not always synced nor well communicated</p> <ul style="list-style-type: none"> <li>● Professional evaluations of faculty is inconsistent</li> <li>● Subject teachers feel they need a deeper understanding of Waldorf Pedagogy overall and in subject class specifically</li> <li>● Curriculum and state assessments aren't aligned, but tests must still be administered</li> </ul>
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**Innovation**

- Journey School has a Waldorf Foundations training program for all Journey staff. Currently, all Main Class Teachers have completed their Waldorf Foundations training, or are in the process of earning their certification.
- Steiner indicates that “experts” are to teach main lesson and subject classes at the high school level. Holding this in mind, Journey School has consciously chosen to begin phasing in experts in the middle school. This stems from Steiner’s indications that we as educators need to meet the times we are in, address the current needs of the learners in front of us as well as be practical. The vast majority of our graduates go to local public schools and so we adjust our faculty and curriculum to prepare them for this inevitability while remaining true to our Waldorf principles. The practical ancillary effect of bringing in experts to teach Math and Humanities in the middle school is that the Main Class Teachers experience less burn out and have a more hygienic teacher life. This also ensures the curriculum is standards aligned.

**Site Visit Team Summary Core Principle #2 Child Development**

**Snapshot:** In each grades classroom the team observed main lesson teachers delivering a main lesson. Examples of art were evident with student paintings on the walls, images related to the block on the chalkboard, and student drawings in main lesson books. The team observed grades teachers leading the class in singing, both to begin the day, and to initiate a transition in the lesson. The school enjoys an extensive outdoor space, rich with trees, plants and grass, as well as a well-developed garden. This outdoor environment alone provides an essential support to healthy child development at all levels. Journey uses Steiner’s indications as well as the Alliance for Public Waldorf Education document aligning the Waldorf curriculum with Common Core standards, to satisfy the academic demands of the school’s charter, while remaining faithful to each child’s developmental readiness.

- Rhythmic work and speech practice observed in main lessons varied considerably from grade to grade. The team recommends a focus on the integration of developmentally appropriate

movement and speech practice in main lessons at all levels. *(see Action Plan: Minor Priorities)*

- As a public school, Journey students take part in the annual California state testing, starting in grade 3, with results slightly above the state average overall.
- Teachers expressed concern about the gaps between state assessment content and the Waldorf curriculum.
- The school is working to establish an array of inhouse formative assessments appropriate to grade and developmental level, beginning with first-grade readiness in kindergarten, proceeding through phonological assessments in grades 1-3, block quizzes in 5-8, and in-house assessment using FastBridge 3 times yearly in grades 3-8.
- The on-site Waldorf foundations training for all teaching staff ensures a common understanding of the role of child development in planning and teaching.
- Oversight and evaluation of teachers and curriculum are currently carried out by the Pedagogical Director, in collaboration with the School Director.
- The PedCouncil functions as an advisory group of fully trained and experienced teachers. They aim to support teachers through observations and mentoring, however scheduling and provision of substitutes to facilitate this has proved to be challenging.
- Consistency in choice of field trips: Members of the PedCo researched and created a handbook to guide class teachers in the choices and planning of field trips by grade, appropriate to developmental level and curriculum relevance.
- Approximately 18% of Journey students qualify for services under SpEd, more than half of those receiving speech therapy. The school has transitioned, as of September 2024, from SPED provision by the school district to the creation of a Journey School SELPA to provide services as part of the school. The new team of 4 provides services in Speech and Language, Occupational Therapy, and Special Education, housed in a dedicated space close to the classrooms.
- SPED team members shared appreciation for the holistic approach to instruction at Journey, as well as a desire to familiarize themselves more in order to better align the way they deliver services, and assessments, with the developmental philosophy of the school.
- During the meeting with student representatives of 6-8th grade, some shared that an experience of stress over the increased homework load and more intensive focus on academics. *(See Action Plan: Minor Priorities)*.
- The school is piloting a new system (2024-25 school year) of electives in grades 6-8 that integrates students in groups across grade levels. Student representatives shared mixed reviews on how it is working.

### **Core Principle #3 Social Change Through Education**

*Public Waldorf education exists to serve both the individual and society.*

#### **From the School's Self Study:**

*"Journey School is dedicated to creating thoughtful engagement in students and opening them to become initiators of positive social change both within themselves and in the community*

*about them. Through classroom discussions, experiences, buddy class interactions, and personal mediations students develop a sense of self-awareness.”*

Strengths	Challenges
<ul style="list-style-type: none"> <li>● Students are involved in a Restoration Project of Aliso Creek</li> <li>● Students work with the Peace Path, a method of resolving conflict, with teacher/school counselor guidance</li> <li>● Students can join our Caroling Club</li> <li>● Teachers use Pedagogical stories to help students manage social</li> <li>● Students participate in Digital Media Literacy Classes (analyzing online content, but also creating content challenges)</li> <li>● Adult ESL classes on campus (through community college, free tuition)</li> <li>● Students participate in service to community</li> <li>● Students participate in activities with other Waldorf schools, both private and private (Pentathlon, Rising Warriors, Track Meet)</li> </ul>	<ul style="list-style-type: none"> <li>● Consistency of service (projects/field trips) throughout the grades</li> <li>● Language barrier, adequate support of EL learners</li> <li>● Difficulty in restarting in-person community service since pandemic, volunteer age rules/regulations</li> <li>● Including students in service opportunities (clothing drives, etc) is getting progressively challenging due to legal requirements (minors doing service)</li> <li>● Depth of understanding of faculty’s knowledge of the full spectrum of programming offerings</li> <li>● Lack of engagement of parents in parental education/activities</li> <li>● School of choice, our school community doesn’t necessarily reflect the diversity of surrounding community</li> </ul>

**Innovation**

- Students work with the Peace Path, a method of resolving conflict, with teacher/school counselor guidance
- Caroling Club
- Fundraising for donations
- 8th grade project mentoring
- The Memory Project
- 6th grade knighting projects - service component
- Pedagogical stories/ imagination
- Buddy classes
- Business Math Donations
- Earthroots

- Digital Media Literacy (analyzing online content, but also creating content). This educational program was created at Journey School, and has been helping our students and countless others to become ethical digital citizens. Students receive DML classes weekly.
- Adult ESL classes on campus (through community college, free tuition)
- Service to community: Isaiah House, Community service parent volunteers
- Farming, exposure and understanding permaculture principles
- Students are involved in the Aliso Creek Restoration Project
- Activities with other Waldorf schools, both private and private (pentathlon, medieval games, track meet)

### **Site Visit Team Summary Core Principle #3 Social Change Through Education**

**Snapshot:** Throughout the campus, there were clear indicators of the school's efforts to inspire students to look beyond themselves and connect with the larger world. Nature-based education, community restoration projects, stewardship, and empathy development were all evident during our visit or mentioned by students and staff. However, there was also a shared sentiment among all stakeholders that social change is an area requiring greater continuity and consistency across the grades.

- The majority of classrooms exhibited a warm atmosphere, arranged with simplicity and beauty. Students were seen sweeping and helping with chores throughout the day.
- The school has teamed up with **Earthroots** a nature-based education and preservation program that fosters a deeper connection with the natural world through hands-on activities such as plant identification, sensory awareness, animal tracking, and exploring local ecosystems.
- Students have been involved in a restoration project focusing on nearby Aliso Creek.
- The campus features an extensive garden. The school community, including students, participates in garden work days throughout the year.
- 8th grade projects encourage students to engage with the world around them, helping to ignite interest in social openness and change.
- A partnership with Synergia has been established to facilitate the 8th grade trip, emphasizing the exploration of students' sense of purpose and contribution combined with a focus on changing the world.
- "Compassionate Campus" is a schoolwide "buddy" program that is implemented at the site for 40 minutes every Wednesday to build connections and help students develop empathy skills.
- Middle school students (6th, 7th, and 8th grades) reported participating in service work, including beach cleanups and volunteering at the Harvest Faire (both working and cleanup).
- Middle school also encourages independent, critical thinking as a means of confronting social change. For example, in one eighth-grade class, students were observed collaborating on establishing equitable rights for their class. When presented with a proposal to listen to music during independent work periods, the teacher countered with, "What might a teacher's argument be for that?"
- Parent cabinet members emphasized a focus on access in their fundraising efforts.

- The Three Streams program implemented at the school also fosters social-emotional development by focusing on a child’s inner life, relationships, and connection to the world, helping children build resilience, empathy, and balance across body, heart, and mind.
- Although the administration, Pedco, and the parent cabinet agreed that there needs to be more consistency and continuity in this area (service projects and field trips) across the grades, all agreed it is an integral part of the school’s vision and a key area for future growth.

**Core Principle #4 Human Relationships**

*Public Waldorf Schools foster a culture of healthy Human relationships.*

**From the School’s Self Study:**

*“Development of healthy relationships are believed to be the foundation for learning at Journey School. We create enduring relationships in multiple ways; teachers travel with students through multiple grades, small groups of speciality staff focus upon either middle, lower, early childhood or Independent Study programs, and all staff work together to bring consistent communication to families...Journey School is committed to building and creating healthy relationships.”*

Strengths	Challenges
<ul style="list-style-type: none"> <li>● Digital Media Literacy classes Including Independent Studies students in whole school/grade events</li> <li>● Alumni Booth at Harvest Faire</li> <li>● Peace Path</li> <li>● Conscious Discipline Program and Training</li> <li>● Three Carestreams (Academic, Social and Behavioral)</li> <li>● Middle School Clubs, Mixed Grade Speciality Classes</li> <li>● Having speakers like Lee Sturgeon Day and Kim John Payne join faculty meetings helping our teachers and</li> </ul>	<ul style="list-style-type: none"> <li>● Lunch Bunch Parent involvement dwindles over time as grades progress</li> <li>● Shift in parent participation since pandemic</li> <li>● Being a commuter school</li> <li>● Loss of school store</li> <li>● Lack of Community Space</li> <li>● During the covid pandemic, we had to stop offering monthly Waldorf inspired workshops offered to the public</li> <li>● Challenging social dynamics within a class/class band-finding connections and building inclusivity</li> </ul>

staff continually reflect on their own relationships with themselves, others, and their students	
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### Innovation

- Digital Media Literacy classes
- Peace Path offers students in conflict a method of working out their differences
- Lunch Bunch hosted by school counselors for students in need of extra help
- Alumni Booth at Harvest Faire
- Conscious Discipline Training for faculty and community
- Having speakers like Lee Sturgeon Day and Kim John Payne join faculty meetings helping our teachers and staff continually reflect on their own relationships with themselves, others, and their students
- Three Carestreams (Academic, Social and Behavioral)
- Middle School Clubs, Mixed Grade Speciality Classes

### Site Visit Team Summary Core Principle #4: Healthy Human Relationships

**Snapshot:** The development and fostering of healthy human relationships is undoubtedly a strength at Journey. Adults on campus were repeatedly seen exhibiting warmth and strong connections with students and with each other. Although specialty teachers expressed a sense of disconnect from classroom teachers, there was still an overwhelming sense of love and connection with the students and the school. In addition, the open-door philosophy practiced by administration was fully appreciated by all staff, students, and parents, helping ensure that everyone felt their voices were heard.

- Journey has an in-house teacher training program (Summer Renewal), where more seasoned teachers with Waldorf training serve as mentors to teachers with less experience. This focused time together provides classroom teachers with an extended opportunity to foster and nurture staff relationships.
- The school's Compassionate Campus program pairs upper-grade mentors with lower-grade buddies every Wednesday to connect with each other and the school, fostering a sense of community.
- Journey also employs Conscious Discipline "with a Waldorf twist"—a trauma-informed, social-emotional learning program designed to help students develop emotional intelligence, self-regulation, and positive interpersonal skills.
- As part of the Three Streams program, there is a **Hearth** area set up in the garden, facilitated by a caring adult (such as an art teacher or other staff member). This physical space focuses on building secure attachments, empathy, and a sense of belonging. (Note: Data is kept on daily visitors to identify students who are using the space for dysregulation versus avoidance.)

- In recent years, the school has focused on staff retention—an area which has shown significant improvement.
- Most classrooms visited reflected a strong sense of community. Students are greeted at the door with warmth and a handshake, and individual students are often recognized each morning. For example, in Kindergarten, there is a sing-and-response for each child: “I see Isiah so strong today.”
- Teachers are expected to host 3-4 parent meetings per year, but some have voiced that parent participation is not as high as they would like.
- There is a communal bell and morning verse before school begins which includes announcements, singing and a reading of Calendar of the Soul. One teacher is tasked with walking down the hallways ringing the bell to call anyone available to join in. On the first morning of our visit, 15 staff members were present.
- The Parent Cabinet reported that “Teachers care” and “Administration listens.”
- Pedco appreciated the open-door policy employed by the administration. One staff member reported, “I can go in there [admin office] any time and talk about anything.”
- Middle school students reported that they like the “small community” feel of Journey School and that they feel their “voice is heard.”
- Specialty teachers reported feeling "isolated" and "siloed" from the rest of the staff. They expressed a desire for more collaboration with classroom teachers and felt inadequately consulted by administration. For instance, staff meetings were not scheduled at accessible times, and no compensation was offered for attendance. Despite these concerns, the group emphasized their love for working at the school. *(see Action Plan: Minor Priorities)*
- Technology was applied inconsistently across the grades. Although it is meant to be a tool to enhance our work, it was observed in several classrooms being used in a way which appeared to sever the bond between teachers and students. *(see Action Plan: Minor Priorities)*

## Core Principle #5 Access and Diversity

*Public Waldorf Schools work to increase diversity and access to all sectors of society.*

### From the School’s Self Study:

*“As a public charter, Journey school is able to serve students regardless of their socio-economic background. Though we work consciously to reflect our community, it is an area which we can deepen and create more consistency throughout the school.”*

Strengths	Challenges
<ul style="list-style-type: none"> <li>● Faculty and Administration strive to innovate and change the curriculum to meet the children of today</li> </ul>	<ul style="list-style-type: none"> <li>● Ethnic and culture diversity in Orange County is higher than what we encounter in Aliso Viejo</li> </ul>



<ul style="list-style-type: none"> <li>● Main Class Teachers remaining with a class over a series of years gives students and teachers a chance to develop deep bonds.</li> <li>● Faculty and staff work with a Whole person approach</li> <li>● Faculty strive to see each student as an individual</li> </ul>	<ul style="list-style-type: none"> <li>● More training needed on how to have open communication and conversations about DEI</li> <li>● Need parent /staff education about gender regarding opinions, social issues and how to have the conversations</li> </ul>
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### **Innovation**

- Partnership with local school district
- Earthroots land acknowledgement
- Adult ESL class on campus as an outreach effort
- Board membership outside our immediate community
- Parent Cabinet - leading fundraising to increase access
- Professional Development through Alliance for Public Waldorf Education and WECAN
- Independent Study increases the number of children able to access education at home
- Participation in school lunches
- We have a well developed program in place for after school care that goes to 5pm and we have expanded our supervision in the morning that starts at 8:00am (40 minutes).

### **Site Visit Team Summary - Core Principle #5 Access and Diversity**

**Snapshot:** Journey’s student population reflects the local community, but not that of the wider county. All stakeholders at the school expressed a desire to see more diversity. While both staff and parent groups mentioned hopes for increased outreach, barriers such as waiting lists that prioritize district and sibling applicants may hinder these efforts. That being said, administration, teachers, and parents are all committed to making progress in this area and are willing to put in the effort to increase diversity and access.

- The school population reflects its location in its immediate community. Demographic information in the Annual Report for 2023-24 shows 42% of students are non-white; under 6% are English language learners, 15% are special education students, and 21.7% qualify for free or reduced lunch.
- Seven languages were represented as reported by the CDE with Japanese and Spanish the two most common second languages.
- Although the school seeks to expand its outreach to underrepresented populations in the county, waiting lists for enrollment may create barriers to some families.

- The Pedco is ensuring that diversity is living in many aspects of the curriculum, including: puppetry, stories, and content.
- At one point, parents at the school created a DEIJ committee which partnered with OC Human Resources. This committee initiated a self-study utilizing surveys, hosting a book study (“The Sum of Us”), and offering speakers to come on campus. This committee, however, was recently disbanded—although Pedco has committed to carry this work forward. For example, one of the kindergarten teachers continues to bring in outside perspectives in her DEIJ work through WECAN.
- The school’s Independent Study (Hybrid) program provides additional access to education for those students who either prefer a more home-based program or who benefit from more access to education from their homes.
- Administration and Pedco are currently working with a new Special Education team to foster more alignment with the school’s program and student needs.
- The majority of members from the parent group cabinet reported that they felt their children with specialized medical needs as well as those with neurodivergent differences were consistently welcomed in all facets of their education.
- The sixth, seventh and eighth grade students reported that their council circle time as a safe place for open discussion regarding diversity in opinions and beliefs.
- All in all, access for all student populations is a priority at Journey. Although the Visiting Team noted that, in terms of diversity, the school appears to be a work-in-progress, it is undoubtedly committed to continuing its growth in this area moving forward.

## **Core Principle #6 Collaborative Leadership**

*School leadership is conducted through shared responsibilities within established legal structures.*

### **From the School’s Self Study:**

*“Faculty, staff, and administration collaborate to guide and lead the school with input from the stakeholder groups. We continue to educate ourselves through summer training, book studies and Waldorf training with Rudolf Steiner’s insights. Governance and internal administration are implemented in a manner that cultivates collaboration, supportive relationships and effective leadership. “*

<b>Strengths</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>● Journey sends surveys to parents regarding feedback about the school experience</li> <li>● Kindergarten intake meetings completed</li> </ul>	<ul style="list-style-type: none"> <li>● Consistent communication with day to day happenings with students, parents, and admin.</li> <li>● Speciality Teachers are unable to attend</li> </ul>

<p>by Early Childhood teachers</p> <ul style="list-style-type: none"> <li>● Parent Cabinet holds monthly meetings</li> <li>● School directors have an open door policy</li> <li>● Teachers serve on various school committees (example: search committee, calendar committee and PedCo)</li> <li>● Active collaboration at staff meetings</li> <li>● Documentation (and sharing the documentation with stakeholders)</li> <li>● Specialty and Main Class Teachers meet together each fall to discuss the students and that year’s curriculum</li> </ul>	<p>staff meetings.</p> <ul style="list-style-type: none"> <li>● Main Class teachers should know the specialty teachers’ curriculum and visa versa.</li> <li>● Follow through with feedback and plans that are set up.</li> <li>● Divide between specialty teachers and Main Class Teachers</li> </ul>
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**Innovation**

- In House Waldorf Teacher Training
- Open Door Policies with administration
- Care Streams and Support circles

**Site Visit Team Summary**

**Snapshot:** The team met with members of the Journey School Council., Parent Cabinet leadership, Pedagogical Council (PedCo), and administration, as well as the subject teacher faculty and the SELPA on-site SpEd team.

The team observed a warm yet professional collaborative relationship between the School and Pedagogical Directors, as well as an open accessibility to members of staff and the community. The Pedagogical Director was busy supporting teachers and students from all levels of the school during the team’s visit, was familiar with all the children, and managed to juggle the team’s appointments along with her very active role while maintaining a calm and friendly demeanor.

Board members described a close and reciprocal working relationship with the school Director who “manages all aspects of the school’s operations including faculty, staff, and student relations. including overseeing the curriculum, instruction, and assessment in the daily operation of the school” (from the school website).

The PedCo teachers function as an advisory group to both the Pedagogical Director and the School Director, who hold the authority of final decision-making.

Parent Cabinet leadership invite the School Director and a PedCo teacher representative to their monthly open meetings.

DEIJ work, previously conducted by a parent group, now functions within the sphere of the Pedagogical Council.

While the team was not able to observe during a full faculty meeting, the opportunity arose to experience the vibrant sense of community that exists among the teaching staff in a shared meal 'baby shower' celebration in honor of a colleague.

- The Journey School Council was scheduled to hold a retreat to begin strategic planning soon after the team visit.
- Pedagogical Council teachers help guide faculty meetings
- Teachers serve on a number of committees
- Kindergarten faculty work together on student intake and promotion to grade 1.
- Class teachers meet three times a month, and work in grade level streams.
- Subject teachers meet together once a month, during main lesson, as well as individually with class teachers when the need arises.
- There is a gap of communication due to subject teachers being unable to attend faculty meetings.
  - Subject teachers are not paid for full faculty meetings.
  - Subject teachers are engaged in after-school tutoring and programs during the hours of faculty meetings.
- The need was expressed for subject teachers to have the opportunity to educate faculty and parents more fully about their curriculum goals.
- Use of ParentSquare has improved the scope and effectiveness of communication between teachers, administration and the parent community.
- Kindergarten teachers involved with Alma Partners DEIJ webinars on Storytelling.
- Parent Cabinet supports the school overall by fundraising targeted to support teacher development.

### **Core Principle #7 Schools as Learning Communities:**

*Public Waldorf schools cultivate a love of lifelong learning and self-knowledge.*

#### **From the School's Self Study:**

*"The Waldorf journey through the grades is marked by developmental milestones in the*

*curriculum, key rites of passage and a festival life that marks the yearly rhythm while nodding to the passage of time. At each point in the child’s journey through the grades and through the year, we build in opportunities for self reflection and measurement of growth. Because the curriculum is designed to meet the children where they are at developmentally, it is rare at Journey school for a child to develop antipathy toward their academic studies. They look forward to the stories their brothers and sisters have heard and build anticipation for the curriculum that is coming through buddy class experiences, curriculum based class plays and project displays.”*

<b>Strengths</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>● Buddies Time between grades classes</li> <li>● Curriculum based field trips</li> <li>● Student led option for higher level, differentiated academic classes</li> <li>● Parents helping and sharing their stories in the classroom</li> <li>● Clubs for upper grades</li> <li>● Emphasis on social/emotional development through teaching them healthy ways to process and utilize skills (i.e. Peace Path, Conscious Discipline)</li> <li>● Compassionate Campus Program encourages respect for differences</li> <li>● Community cultivation starts in Kindergarten</li> <li>● Festivals cultivate community</li> </ul>	<ul style="list-style-type: none"> <li>● No established/consistent elementary grades wide discipline system</li> <li>● Hearth, inconsistent approach to how it’s used across the grades</li> <li>● Communicating expectations with children &amp; parents</li> <li>● School-wide policies such as “no toys on campus” is inconsistent across the board</li> <li>● 8th grade projects Reflective Practice for students is inconsistent across the board</li> </ul>

**Innovation**

- Peace Path (self-reflection)
- Our buddy system between upper and lower grades classes
- All school seasonal assemblies
- Challenge groups (pull out students for differentiated instruction)

- Upper grades reading to lower grades classes
- Hearth
- Clubs
- Teacher facilitated adult offerings in handwork, art, Conscious Discipline and pedagogical book studies
- Parent information sessions

### **Site Visit Team Summary Core Principle #7 Learning Communities**

**Snapshots:** Each morning staff gather in the courtyard at 8:00 for announcements and a reading of Calendar of the Soul. The Pedagogical Advisory Committee is open to staff and teachers in good standing and with 3 years of experience. They meet regularly but do not hold any actionable power. Ideas are carried by the administrative staff. The staff was observed respectfully collaborating and engaging in thoughtful discussions in nearly every setting we observed. The Parent advisory group is robust and active in the community. (Note: this section of Journey’s self-study does not seem to directly address the Core Principle stated, although the team did see much that supported the dedication to this idea. A slight reworking may be needed.)

- The Visiting Team observed the collaborative approach to learning communities carries over into classrooms and amongst the students, who share meaningful work.
- The waiting pool for all grades is an indicator of the success Journey has had in developing a strong learning community among the students.
- Parent Education offerings help deepen the understanding of Waldorf pedagogy and child development.
- Teacher training ensures that the staff come from a common understanding of their purpose and mission at the school.
- Waldorf training and continued deepening for staff is upheld as a school priority and sets a strong foundation throughout the school.
- The staff expressed that time and availability are challenges they struggle to maintain the consistency of mentoring relationships and meeting times for learning communities. *(see Action Plan: Minor Priorities)*
- The school has developed a summer program for introduction to Waldorf and for teacher education. This is open to all—however, in speaking with the specialty teachers it became apparent that the logistics of their part-time, hourly status limited their involvement with the Summer professional development program, since they are not paid to attend meetings, and need to use vacation time from outside employment.
- Specialty staff indicated that although they loved working at the school and with the students, they sometimes felt left out of the mainstream. For example, they shared that they sometimes seemed to be included as an afterthought, rather than in the planning.

- The weekly staff meetings are scheduled at times when the specialty teachers are not able to attend and they do not get paid to do so. (*see Action Plan: Minor Priorities*)

### **Summary of Strengths and Challenges from the Visiting Team:**

**Strengths:** Journey School is a thriving and well-established school which is well-known in the community and draws students from all over Orange County. The faculty, staff and students appear content and supportive of their school. Its growth is proof that they are successfully serving those members of the community who have chosen a Waldorf-inspired education. The administration has taken the time and effort to provide training for most of its teachers and a well-rounded curriculum for its students. The community appears to be well-integrated into the school. Parents and students reported feeling heard and supported.

**Challenges** In the eyes of the visiting team, the school faces challenges in 4 areas:

1. There was a lack of rhythmic work incorporated into the morning lesson. This is the breathing element of the curriculum.
2. Balancing the demands for accountability through state testing with Steiner’s ideas around child development. It is easy to succumb to outside pressure to push academic standards from high school down into the grades in the hope that it will improve test scores. The students reported feeling stress over the load of homework assigned.
3. Technology was inconsistently used throughout the grades and at times seemed to create a noticeable separation between the teachers and students.
4. Specialty teachers felt that they could be better incorporated into the community. They sometimes felt as though they were an afterthought.

### **Action Plan (Key action items)**

From the Self-Study:

Fall: 2030

- 2023/2024 Development of our own Special Education Department
- 2024/2025 Open our own Special Education Department to include initial hiring in process.
- Formalize Our Teacher Mentorship

Recommendations from the visiting team (listed in order of importance):

1. Attention to the need for conscious integration of all subject teachers in professional development, ongoing faculty meetings and communication: make sure that *all* faculty feel equally held and of importance in the community. This may mean offering a rate of pay for meeting time. It will only strengthen the community in the long run.
2. A. Movement in main lesson: The team recommends a focus on the integration of developmentally appropriate movement and speech practice in main lessons through teacher

professional development. While it can seem that rhythmic work takes away valuable time teaching, in fact it is now known that activities such as singing in rounds, moving and speaking, counting and jumping can not only cement concepts into our memory, but that they develop critical executive function capacities. This is a unique feature of Waldorf pedagogy that needs to be included daily in the classroom.

B. Speech in main lesson: Given the high number of students receiving SPED services for speech and language development at the school, the team recommends a deliberate focus on strengthening the existing Waldorf methods to better serve these students within the classroom. Teacher development sessions and regular assemblies where a few classes present their work could support this endeavor. Even if informal and presented in an outdoor setting, establishing a monthly “sharing” assembly might inspire teachers (including specialty teachers!) to incorporate more rhythmic work into their main lessons. It is an easy way to stimulate creativity amongst staff.

3. Reexamine homework practices in the upper grades review the decision to track academic subjects as preparation for high school in the light of student stress, the possible inequities caused for students with learning differences, as well as current research in both areas.
4. Creating a common understanding around the appropriate use of technology in classrooms. A common understanding of when it improves teaching versus when it just makes it easier for the teacher would be helpful.

## **Conclusion**

Journey School is a strong community with stakeholders who appear committed to the ideals of Waldorf education. Their strong enrollment, connection to the wider Waldorf school community through yearly events such as Rising Warriors, and commitment to training their employees is evidence of their understanding of the importance of the 7 principles of Waldorf education. The administration appears accessible to staff and students and the whole community exuded a healthy sense of well-being as well as developing ideas for continued growth.

Journey school is well established in the community, as evidenced by its large waiting pool, and has a wonderful site offered by the district. They have put to use every available inch in creative and innovative ways. Most agree that having their own site someday would be a wonderful addition.

The members of the staff and faculty that the team spoke with showed kindness and respect for their colleagues and a desire to work together to bring about meaningful change. We agree that moving the special education program “in-house” is a good plan that will better support



everyone involved in the long run. While the school is in great shape overall, and believes they are dedicated to the principles of Waldorf education, the team did see a few places that warrant attention. Please see recommendations above.

### **Characteristics of High Performing Public Waldorf Schools Form**

#### **Attachments from the text:**

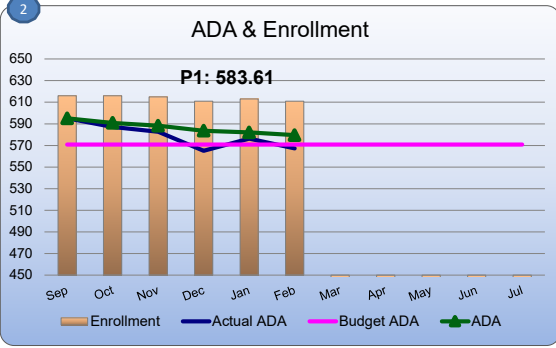
**School Action Plan**

# JOURNEY SCHOOL - Financial Dashboard (February 2025)

**1 Key Performance Indicators**

ADA vs. Budget ● Cash on Hand ●

Net Income / (Loss) ● Year-End Cash ●



**State Budget Update**

**Per School Services of CA: President Trump Issues Executive Order on Department of Education**

In a highly anticipated move, today, March 20, 2025, President Donald Trump signed an Executive Order to “begin eliminating” the U.S. Department of Education (ED). In his remarks, President Trump acknowledged his limitations, noting that the authority to abolish the U.S. Department of Education would need to go before Congress. Despite this, President Trump noted that his administration would take all legal actions possible to “shut down” the ED.

The Executive Order itself provides very few details:

- The Secretary of Education shall, to the maximum extent appropriate and permitted by law, take all necessary steps to facilitate the closure of the Department of Education and return authority over education to the States
- Consistent with the Department of Education’s authorities, the Secretary of Education shall ensure that the allocation of any Federal Department of Education funds is subject to rigorous compliance with Federal law and Administration policy

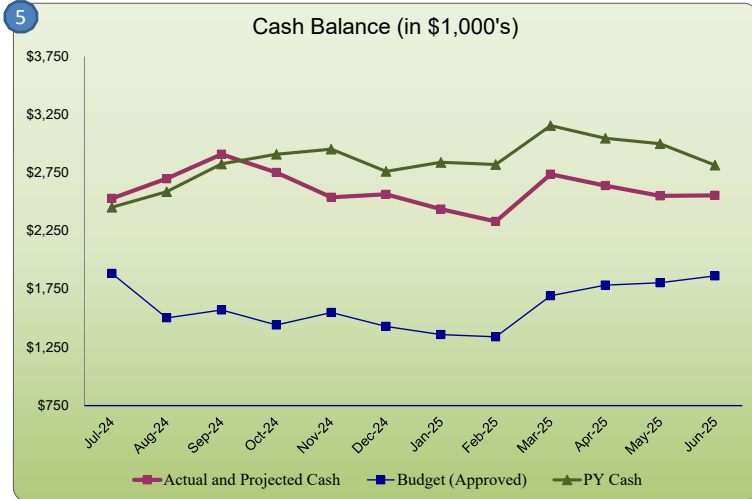
During his press conference, President Trump stated the “core necessities” of Pell Grants, Title I, and the Individuals with Disabilities Education Act (IDEA) will all be preserved and redistributed to other departments. The Executive Order makes no mention of these specific programs, nor which alternate departments they would be housed in. ....California, due to its size, receives a substantial portion of these federal funds and any adjustment of these funding streams could have substantial impacts for education. For these reasons, we will continue to monitor the actions taken as a result of this Executive Order. Stay tuned.

**3 Attendance Analysis**

	Actual through Month 6	Forecasted P2	Budgeted P2	Budget Variance B/(W)	FY 23-24	FY 22-23
Enrollment	611	608	613	(5)	587	571
Attendance %	94.4%	94.4%	93.1%	1.3%	93.3%	92.1%
Avg Daily Attendance (ADA)	579.57	578.24	570.84	7.40	549.71	533.24

**4 Income Statement**

	Actual through 02/28/25	Forecast as of 02/28/25	FY 24-25 Budget	Budget Variance B/(W)	FY 23-24	FY 22-23
Local Control Funding Formula	3,717,694	6,646,703	6,553,021	93,682	6,138,343	5,503,044
Federal Revenue	24,974	59,532	145,815	(86,283)	148,993	127,380
State Revenue	1,065,175	825,649	866,698	(41,049)	505,447	979,037
Other Local Revenue	176,412	779,707	687,715	91,992	85,124	47,713
Grants/Fundraising	101,573	235,000	255,000	(20,000)	243,600	293,886
<b>TOTAL REVENUE</b>	<b>5,085,828</b>	<b>8,546,591</b>	<b>8,508,248</b>	<b>38,343</b>	<b>7,121,507</b>	<b>6,951,059</b>
<i>Total per ADA</i>		14,780	14,905	(124)	12,955	13,036
<i>w/o Grants/Fundraising</i>		14,374	14,458	(84)	12,512	12,484
Certificated Salaries	1,943,999	3,081,264	3,131,581	50,317	2,358,174	2,091,898
Classified Salaries	860,274	1,365,457	1,354,562	(10,895)	1,267,994	1,161,891
Benefits	1,076,789	1,631,663	1,714,319	82,656	1,257,924	1,230,170
Student Supplies	149,649	285,312	283,950	(1,362)	259,102	395,837
Operating Expenses	1,147,376	1,964,901	1,834,454	(130,446)	1,714,289	1,619,604
Other	86,523	131,823	128,615	(3,209)	107,190	26,002
<b>TOTAL EXPENSES</b>	<b>5,264,612</b>	<b>8,460,421</b>	<b>8,447,481</b>	<b>(12,940)</b>	<b>6,964,673</b>	<b>6,525,402</b>
<i>Total per ADA</i>		14,631	14,798	167	12,670	12,237
<b>NET INCOME / (LOSS)</b>	<b>(178,784)</b>	<b>86,170</b>	<b>60,767</b>	<b>25,403</b>	<b>156,834</b>	<b>425,657</b>
<b>OPERATING INCOME</b>	<b>(92,260)</b>	<b>217,993</b>	<b>189,382</b>	<b>28,611</b>	<b>264,024</b>	<b>451,659</b>



**6 Balance Sheet**

	6/30/2024	2/28/2025	6/30/2025 FC
<b>Assets</b>			
Cash, Operating	2,817,148	2,332,555	2,557,146
Accounts Receivable	835,276	447,589	1,094,807
Due From Others	452	452	0
Other Assets	249,875	72,723	69,330
Net Fixed Assets	315,760	237,236	198,936
<b>Total Assets</b>	<b>4,218,511</b>	<b>3,090,555</b>	<b>3,920,219</b>
<b>Liabilities</b>			
A/P & Payroll	314,789	339,713	459,809
Due to Others	226,835	88,093	533,249
Deferred Revenue	835,353	0	0
Other Liabilities	2,615	2,615	2,072
Total Debt	0	0	0
<b>Total Liabilities</b>	<b>1,379,592</b>	<b>430,421</b>	<b>995,130</b>
<b>Equity</b>			
Beginning Fund Bal.	2,682,084	2,838,918	2,838,918
Net Income/(Loss)	156,834	(178,784)	86,170
Total Equity	2,838,918	2,660,135	2,925,089
<b>Total Liabilities &amp; Equity</b>	<b>4,218,511</b>	<b>3,090,555</b>	<b>3,920,219</b>

**Year-End Cash Balance**

Projected	Budget	Variance
2,557,146	1,864,867	692,279

Days Cash on Hand	149	102	112
Cash Reserve %	40.7%	28.0%	30.7%



Actuals as of 2/28/2025

	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL						FORECAST	Budget Variance
	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Accrual	Jul-24 - Jun-25	Better / (Worse)
<b>Income</b>															
<b>8011-8098 - Local Control Funding Formula Sources</b>															
8011 Local Control Funding Formula	61,314	61,314	110,365	110,365	110,365	110,365	110,365	27,834	27,834	27,834	27,834	-	(37,030)	748,759	(581,969)
8012 Education Protection Account	-	-	27,486	-	-	27,485	-	-	32,496	-	-	-	-	116,340	-
8019 Local Control Funding Formula - Prior Year	-	-	-	-	-	-	-	-	-	-	-	-	(25,165)	(25,165)	(25,165)
8096 In Lieu of Property Taxes	-	306,252	612,504	408,336	408,336	408,336	408,336	408,336	963,019	481,509	481,509	481,509	427,786	5,795,769	689,816
8098 In Lieu of Property Taxes, Prior Year	-	-	-	-	-	-	-	-	-	-	-	-	11,000	11,000	-
<b>Total 8011-8098 - Local Control Funding Formula Sources</b>	<b>61,314</b>	<b>367,566</b>	<b>750,355</b>	<b>518,701</b>	<b>518,701</b>	<b>546,186</b>	<b>518,701</b>	<b>436,170</b>	<b>1,023,349</b>	<b>509,343</b>	<b>509,343</b>	<b>481,509</b>	<b>405,464</b>	<b>6,646,703</b>	<b>93,682</b>
<b>8100-8299 - Federal Revenue</b>															
8181 Special Education - Federal (IDEA)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(95,009)
8291 Title I	-	-	-	-	7,131	-	7,760	-	-	-	-	26,091	-	40,982	8,402
8292 Title II	-	-	-	2,095	-	-	6,172	-	-	-	-	-	-	8,550	324
8295 Title IV, SSAFE	-	-	-	-	-	-	1,816	-	-	-	-	-	-	10,000	-
8299 All Other Federal Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total 8100-8299 - Federal Revenue</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>2,095</b>	<b>7,131</b>	<b>-</b>	<b>15,748</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>34,558</b>	<b>59,532</b>	<b>(86,283)</b>
<b>8300-8599 - Other State Revenue</b>															
8550 Mandate Block Grant	-	-	-	-	11,027	-	-	-	-	-	-	-	-	11,027	52
8560 Lottery Revenue	-	-	333	-	-	36,984	-	-	-	28,772	-	-	98,410	164,499	16,040
8592 State Mental Health	2,283	2,283	4,109	4,109	4,109	4,109	4,109	4,622	4,622	4,622	4,622	-	3,192	46,791	599
8595 Expanded Learning Opportunity Program	144,243	7,713	13,883	13,883	13,883	13,883	13,883	13,889	13,889	13,889	13,889	-	(90,748)	186,179	2,210
8596 Prop 28 Arts & Music	77,127	3,637	6,546	6,546	6,546	6,546	6,546	6,547	6,547	6,547	6,547	-	(40,832)	98,850	25,085
8599 State Revenue - Other	625,333	-	-	69	-	1,738	-	4,657	-	-	-	-	(313,494)	318,303	(85,034)
<b>Total 8300-8599 - Other State Revenue</b>	<b>848,986</b>	<b>13,633</b>	<b>24,871</b>	<b>24,607</b>	<b>35,565</b>	<b>63,259</b>	<b>24,538</b>	<b>29,715</b>	<b>25,058</b>	<b>53,830</b>	<b>25,058</b>	<b>-</b>	<b>(343,472)</b>	<b>825,649</b>	<b>(41,049)</b>
<b>8600-8799 - Other Local Revenue</b>															
8660 Interest & Dividend Income	1	1,580	2,930	18,025	6,481	6,135	2,582	20,161	3,026	3,026	3,026	3,026	-	70,000	20,000
8662 Net Increase (Decrease) in Fair Value of Investments	2,556	4,667	2,991	(3,111)	(3,870)	2,727	1,452	2,261	2,582	2,582	2,582	2,582	-	20,000	-
8682 Childcare & Enrichment Program Fees	-	-	17,443	17,815	16,239	16,538	14,429	15,598	15,484	15,484	15,484	15,484	-	160,000	52,000
8689 All Other Fees & Contracts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(2,500)
8692 Grants	-	-	-	-	-	-	-	600	-	-	-	36,000	35,400	72,000	-
8695 Contributions & Events	3,263	1,331	2,015	3,350	7,496	9,085	6,443	989	5,257	5,257	5,257	5,257	-	55,000	(20,000)
8696 Other Fundraising	85	3,255	10,684	13,788	6,880	6,879	10,314	15,116	10,250	10,250	10,250	10,250	-	108,000	(0)
8697 E-Rate	77	10,241	77	77	77	77	77	77	77	77	77	77	-	11,089	10,438
8699 All Other Local Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
8792 Transfers of Apportionments - Special Education	-	-	-	-	-	-	-	-	96,740	96,740	96,740	96,740	131,658	518,618	12,054
<b>Total 8600-8799 - Other Local Revenue</b>	<b>5,982</b>	<b>21,075</b>	<b>36,140</b>	<b>49,945</b>	<b>33,303</b>	<b>41,441</b>	<b>35,298</b>	<b>54,802</b>	<b>133,416</b>	<b>133,416</b>	<b>169,416</b>	<b>168,816</b>	<b>131,658</b>	<b>1,014,707</b>	<b>71,992</b>
<b>TOTAL INCOME</b>	<b>916,282</b>	<b>402,274</b>	<b>811,366</b>	<b>595,349</b>	<b>594,700</b>	<b>650,886</b>	<b>594,285</b>	<b>520,687</b>	<b>1,181,823</b>	<b>696,590</b>	<b>703,818</b>	<b>684,884</b>	<b>193,649</b>	<b>8,546,591</b>	<b>38,343</b>
<b>Expense</b>															
<b>Total 1000 - Certificated Salaries</b>	<b>35,528</b>	<b>219,416</b>	<b>291,125</b>	<b>284,963</b>	<b>278,581</b>	<b>275,011</b>	<b>280,981</b>	<b>278,395</b>	<b>283,154</b>	<b>284,704</b>	<b>284,704</b>	<b>284,704</b>	<b>-</b>	<b>3,081,264</b>	<b>50,317</b>
<b>Total 2000 - Classified Salaries</b>	<b>40,573</b>	<b>54,295</b>	<b>138,889</b>	<b>147,190</b>	<b>131,346</b>	<b>114,130</b>	<b>108,596</b>	<b>125,255</b>	<b>128,587</b>	<b>127,171</b>	<b>127,171</b>	<b>122,253</b>	<b>-</b>	<b>1,365,457</b>	<b>(10,895)</b>
<b>Total 1000-2000 - Salaries</b>	<b>76,101</b>	<b>273,712</b>	<b>430,015</b>	<b>432,153</b>	<b>409,927</b>	<b>389,140</b>	<b>389,577</b>	<b>403,650</b>	<b>411,741</b>	<b>411,875</b>	<b>411,875</b>	<b>406,956</b>	<b>-</b>	<b>4,446,721</b>	<b>39,421</b>
<b>3000 - Employee Benefits</b>															
3111 STRS - State Teachers Retirement System	6,906	42,843	61,000	60,451	58,926	56,931	57,789	57,972	56,898	57,194	57,194	57,194	-	631,298	9,377
3212 PERS - Public Employee Retirement System	9,845	12,552	25,563	26,062	24,574	24,133	21,416	23,361	34,783	34,400	34,400	33,069	-	304,160	62,249
3213 PARS - Public Agency Retirement System	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
3311 OASDI - Social Security	2,415	3,002	6,242	6,891	6,062	5,387	5,178	5,927	7,058	6,971	6,971	6,666	-	68,771	1,403
3331 MED - Medicare	1,089	3,954	6,066	6,093	5,772	5,472	5,488	5,678	5,970	5,972	5,972	5,901	-	63,428	1,621
3401 H&W - Health & Welfare	85,965	48,660	64,388	45,336	18,066	61,335	42,301	13,478	26,463	42,301	42,301	(11,796)	-	478,797	17,401
3501 SUI - State Unemployment Insurance	38	136	209	210	199	189	189	196	206	206	206	203	-	2,187	56
3601 Workers' Compensation Insurance	242	1,541	19,297	3,913	7,735	3,913	3,913	3,913	3,913	3,913	3,913	-	-	52,293	(9,066)
3902 Other Benefits	-	-	-	331	-	-	53	-	-	-	-	-	30,345	30,729	(384)
<b>Total 3000 - Employee Benefits</b>	<b>106,500</b>	<b>112,688</b>	<b>182,764</b>	<b>149,288</b>	<b>121,334</b>	<b>157,360</b>	<b>136,328</b>	<b>110,526</b>	<b>135,291</b>	<b>150,957</b>	<b>147,044</b>	<b>121,583</b>	<b>-</b>	<b>1,631,663</b>	<b>82,656</b>
<b>Total 1000-3000 - Salaries &amp; Benefits</b>	<b>182,601</b>	<b>386,400</b>	<b>612,779</b>	<b>581,441</b>	<b>531,261</b>	<b>546,500</b>	<b>525,905</b>	<b>514,176</b>	<b>547,032</b>	<b>562,832</b>	<b>558,919</b>	<b>528,539</b>	<b>-</b>	<b>6,078,384</b>	<b>122,077</b>
<b>4000 - Supplies</b>															
4111 Core Curricula Materials	3,493	10,134	4,081	1,203	88	583	-	221	6,351	6,351	6,351	6,351	-	45,207	-
4211 Books & Other Reference Materials	-	-	1,212	1,586	319	-	26	180	929	929	929	929	-	7,040	-
4311 Student Materials	-	13,168	7,831	8,449	4,427	792	1,614	1,750	8,924	8,924	8,924	8,924	-	73,728	-
4351 Office Supplies	2,158	474	1,772	1,465	1,704	766	658	485	2,927	2,927	2,927	2,927	-	21,189	4
4371 Custodial Supplies	1,359	2,802	5,362	2,126	5,017	1,875	1,951	515	1,749	1,749	1,749	1,749	-	28,000	(7,000)
4390 Other Supplies	204	1,170	2,050	3,880	1,730	2,508	984	8,748	11,019	11,019	11,019	11,019	-	65,349	5,633
4411 Non Capitalized Equipment	3,777	14,208	7,951	5,485	4,679	-	(663)	1,293	2,018	2,018	2,018	2,018	-	44,800	-

Actuals as of 2/28/2025

	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	Mar-25	Apr-25	May-25	Jun-25	Accrual	FORECAST		Budget Variance Better / (Worse)
	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25						Jul-24	Jun-25	
<b>Total 4000 - Supplies</b>	<b>10,990</b>	<b>41,956</b>	<b>30,259</b>	<b>24,194</b>	<b>17,965</b>	<b>6,522</b>	<b>4,570</b>	<b>13,192</b>	<b>33,916</b>	<b>33,916</b>	<b>33,916</b>	<b>33,916</b>	-	<b>285,312</b>		(1,362)
<b>5000 - Operating Services</b>																
5211 Travel & Conferences	1,404	1,279	-	-	394	233	2,782	(1,843)	5,425	5,425	5,425	5,425	-	25,950		-
5311 Dues & Memberships	9,161	-	4,300	-	159	(99)	-	488	1,601	1,601	1,601	1,601	-	20,410		465
5451 General Insurance	41,548	20,843	11	6,524	11	9,748	3,259	3,259	3,259	3,259	3,259	3,259	-	91,735		(18,459)
5511 Utilities	4,464	6,890	11,286	7,270	5,843	7,991	1,791	7,349	8,054	8,054	8,054	8,054	-	85,100		200
5521 Security Services	141	-	141	-	-	141	-	-	-	-	141	-	-	564		(411)
5531 Housekeeping Services	5,644	11,896	9,108	-	17,470	6,885	9,124	8,563	9,360	9,360	9,360	9,360	-	106,130		-
5599 Other Facility Operations & Utilities	784	3,127	519	2,244	334	334	334	345	559	559	559	559	-	10,258		(4,508)
5611 School Rent - Private Facility	-	-	-	-	-	-	-	-	4	4	4	4	-	17		-
5613 School Rent - Prop 39	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-
5619 Other Facility Rentals	15,630	15,455	23,184	15,962	15,130	15,130	15,130	15,130	15,352	15,352	15,352	15,352	-	192,162		(7,600)
5621 Equipment Lease	1,048	812	3,765	3,765	1,412	1,304	3,979	2,659	1,148	1,148	1,148	1,148	-	24,136		-
5631 Vendor Repairs	5,480	3,929	14,250	6,540	5,226	1,848	2,569	3,510	1,176	1,176	1,176	1,176	-	48,054		(36,554)
5812 Field Trips & Pupil Transportation	15,808	-	1,665	29,876	13,348	1,152	5,555	16,448	14,939	14,939	14,939	14,939	-	143,607		-
5821 Legal	-	135	2,210	2,175	768	873	375	474	3,436	13,185	13,185	13,185	-	50,000		50,000
5823 Audit	-	696	6,747	-	8,882	-	-	-	-	-	-	3,175	-	19,500		-
5831 Advertisement & Recruitment	-	-	-	-	42	502	1,298	-	163	163	163	163	-	2,495		(329)
5841 Contracted Substitute Teachers	-	-	1,663	4,277	475	742	799	266	3,772	3,772	3,772	3,772	-	23,309		-
5842 Special Education Services	-	-	9,073	-	-	-	9,900	171,160	59,217	59,217	59,217	59,217	-	427,000		(17,000)
5849 Other Student Instructional Services	30,000	60,000	4,840	36,137	55,784	55,253	2,392	(117,739)	11,813	11,813	11,813	11,813	-	173,917		4,094
5852 PD Consultants & Tuition	2,353	500	4,809	3,707	-	180	-	131	2,609	2,609	2,609	2,609	-	22,116		-
5854 Nursing & Medical (Non-IEP)	-	-	7,055	9,738	9,358	6,453	10,486	13,433	12,432	12,432	12,432	12,432	-	106,250		(106,250)
5859 All Other Consultants & Services	31,642	13,442	13,442	14,942	1,500	14,942	17,083	15,075	21,961	21,961	21,961	21,961	-	209,908		-
5861 Non Instructional Software	19,846	870	2,812	3,131	461	301	1,048	1,351	4,226	4,226	4,226	4,226	-	46,725		-
5865 Fundraising Cost	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-
5871 District Oversight Fees	-	-	-	25,557	-	4,868	-	17,646	4,634	4,634	4,634	4,634	-	66,609		(1,078)
5872 Special Education Fees (SELPA)	-	-	-	-	-	-	-	-	-	-	-	-	-	35,752		4,470
5899 All Other Expenses	801	1,010	1,546	3,139	1,776	2,152	3,968	2,838	2,013	2,013	2,013	2,013	-	25,282		(4,307)
5911 Office Phone	-	-	-	-	-	(120)	-	-	30	30	30	30	-	-		6,916
5913 Mobile Phone	48	58	58	58	64	159	(35)	65	69	69	69	69	-	752		1,636
5921 Internet	399	330	330	330	330	309	309	309	320	320	320	320	-	3,927		316
5923 Website Hosting	145	10	-	-	-	-	-	252	98	98	98	98	-	800		(61)
5931 Postage & Shipping	-	57	-	45	10	321	48	48	424	424	424	424	-	2,178		(357)
5999 Other Communications	50	-	-	-	-	71	21	21	24	24	24	24	-	258		-
<b>Total 5000 - Operating Services</b>	<b>186,398</b>	<b>141,339</b>	<b>114,544</b>	<b>184,488</b>	<b>138,778</b>	<b>121,935</b>	<b>98,657</b>	<b>161,238</b>	<b>188,117</b>	<b>197,866</b>	<b>198,007</b>	<b>233,534</b>	-	<b>1,964,901</b>		(130,446)
<b>6000 - Capital Outlay</b>																
6901 Depreciation Expense	10,768	10,768	10,768	10,768	10,768	10,768	10,958	10,958	11,325	11,325	11,325	11,325	-	131,823		(3,209)
<b>Total 6000 - Capital Outlay</b>	<b>10,768</b>	<b>10,768</b>	<b>10,768</b>	<b>10,768</b>	<b>10,768</b>	<b>10,768</b>	<b>10,958</b>	<b>10,958</b>	<b>11,325</b>	<b>11,325</b>	<b>11,325</b>	<b>11,325</b>	-	<b>131,823</b>		(3,209)
<b>7000 - Other Outgo</b>																
7438 Interest Expense	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-
<b>Total 7000 - Other Outgo</b>																
<b>TOTAL EXPENSE</b>	<b>390,757</b>	<b>580,463</b>	<b>768,350</b>	<b>800,890</b>	<b>698,772</b>	<b>685,726</b>	<b>640,090</b>	<b>699,563</b>	<b>780,390</b>	<b>805,939</b>	<b>802,167</b>	<b>807,314</b>	-	<b>8,460,421</b>		(12,940)
<b>NET INCOME</b>	<b>525,525</b>	<b>(178,189)</b>	<b>43,017</b>	<b>(205,542)</b>	<b>(104,073)</b>	<b>(34,840)</b>	<b>(45,805)</b>	<b>(178,877)</b>	<b>401,433</b>	<b>(109,349)</b>	<b>(98,349)</b>	<b>(122,430)</b>	<b>193,649</b>	<b>86,170</b>		25,403
<b>Operating Income</b>														217,993		-
<b>Operating Income Excluding Non-cash Lease Expenses</b>														218,010		-
<b>EBITDA</b>														217,993		-
<b>Beginning Cash Balance</b>	2,817,148	2,531,017	2,700,535	2,910,872	2,753,858	2,540,115	2,565,741	2,438,832	2,332,555	2,738,313	2,640,289	2,553,265	2,557,146	2,817,148		232,993
<b>Cash Flow from Operating Activities</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-
<b>Net Income</b>	525,525	(178,189)	43,017	(205,542)	(104,073)	(34,840)	(45,805)	(178,877)	401,433	(109,349)	(98,349)	(122,430)	193,649	86,170		25,403
<b>Change in Accounts Receivable</b>																
Prior Year Accounts Receivable	28,515	297,345	38,379	9,316	-	3,341	684	10,107	-	-	-	53,700	-	441,387		(441,387)
Current Year Accounts Receivable	-	-	-	-	-	-	-	-	-	-	-	-	(700,918)	(700,918)		(66,501)
<b>Change in Due from</b>														452		452
<b>Change in Accounts Payable</b>	(8,280)	(15,945)	26,157	97,203	(130,972)	54,524	(102,846)	83,109	-	-	-	120,096	-	123,046		129,939
<b>Change in Due to</b>	(875)	(894)	(781)	(66,774)	(793)	(17,285)	40	(51,381)	(15,656)	(15,661)	(15,667)	(15,672)	507,812	306,414		1,100,318
<b>Change in Accrued Vacation</b>														-		-
<b>Change in Payroll Liabilities</b>	(77,526)	42,658	77,667	(17,636)	(4,329)	(4,095)	1,104	4,132	-	-	-	-	-	21,975		21,975
<b>Change in Prepaid Expenditures</b>	55,464	(1,860)	(514)	-	-	(50)	(1,113)	-	-	-	-	(59,263)	-	(7,336)		56,502

Actuals as of 2/28/2025

	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL	ACTUAL						FORECAST	Budget Variance	
	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Accrual	Jul-24 - Jun-25	Better / (Worse)
Change in Deposits	-	-	-	-	-	-	-	-						-	-
Change in Deferred Revenue	(835,353)	-	-	-	-	-	-	-						(835,353)	(835,353)
Change in Other Long Term Assets	15,631	15,638	15,644	15,650	15,656	15,662	15,669	15,675	15,656	15,661	15,667	15,672		187,881	
Change in Other Long Term Liabilities	-	-	-	-	-	-	-	-					(543)	(543)	
Depreciation Expense	10,768	10,768	10,768	10,768	10,768	10,768	10,958	10,958	11,325	11,325	11,325	11,325		131,823	3,209
<b>Cash Flow from Investing Activities</b>	-	-	-	-	-	-	-	-							
Capital Expenditures	-	-	-	-	-	(2,400)	(5,600)	-	(7,000)	-	-	-		(15,000)	-
<b>Ending Cash Balance</b>	<b>2,531,017</b>	<b>2,700,535</b>	<b>2,910,872</b>	<b>2,753,858</b>	<b>2,540,115</b>	<b>2,565,741</b>	<b>2,438,832</b>	<b>2,332,555</b>	<b>2,738,313</b>	<b>2,640,289</b>	<b>2,553,265</b>	<b>2,557,146</b>	<b>2,557,146</b>	<b>2,557,146</b>	<b>692,279</b>

## **Journey School Financial Analysis February 2025**

### **Net Income**

Journey School is projected to achieve a net income of \$86,170 in FY24-25 compared to \$60,767 in the board-approved budget. This is \$25,403 more than the board-approved budget.

### **Balance Sheet**

As of February 28, 2025, the school's cash balance was \$2,332,555. By June 30, 2025, the school's cash balance is projected to be \$2,557,146.

As of February 28, 2025, the Accounts Receivable balance was \$447,589. Most of this balance is the Employee Retention Credit of \$368,585.

As of February 28, 2025, the Accounts Payable balance, including payroll liabilities, totaled \$339,713.

### **Income Statement**

#### *Revenue*

Total revenue for FY24-25 is projected to be \$8,846,591, which is \$38,343 more than the budgeted amount.

- LCFF is projected to be \$93,982 over budget based on the projected higher ADA for the school.
- Federal IDEA funds are projected to be \$95,009 under budget. El Dorado provided an update on the funds and the CDE may provide the funds this year. Given that the funds are not assured, they have been removed from the forecast.
- State Revenue Other is projected to be \$85,034 under budget as the school will defer the Arts Music and Instructional Materials Block Grant.
- Childcare and Enrichment Fees are projected to be \$52,000 over budget based on higher expected participation rates.

#### *Expenses*

Total expenses for FY24-25 are projected to be \$8,460,421 which is \$12,940 more than the budgeted amount.

- PERS is projected to be \$62,249 due to less employees being eligible for the program.
- Legal is projected to be \$50,000 under budget.
- Nursing is projected to be \$106,250 over budget due to additional student needs.

Note- Forecast variances of \$40,000 and 10% of budget will be discussed in this report.

**ADA**

The budgeted P2 ADA is 570.84 based on an enrollment of 613 and a 93.1% attendance rate.

Month 1 ADA: 595.06

Month 5 ADA: 576.37

Month 2 ADA: 587.10

Month 6 ADA: 567.22

Month 3 ADA: 582.72

Month 4 ADA: 565.07

P1 ADA: 583.61

Note- Forecast variances of \$40,000 and 10% of budget will be discussed in this report.

**Journey School  
Check Register  
For the Month Ending February 28, 2025**

Check #	Vendor Name	Date Description	Amount
E018972	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	1/6/2025 12/02/24-12/06/24 - NURSE	2,831.83
E018973	DEPARTMENT OF JUSTICE	1/6/2025 11/24 - FINGERPRINTS 12/08/24-01/07/25 - INTERNET & CA	282.00
E018974	COX COMMUNICATIONS	1/6/2025 TELECONNECT FUND	231.75
E018975	ALPINE FRESH USA	1/6/2025 11/24 - BOTTLED WATER SERVICE	511.25
E018976	STAPLES	1/6/2025 GLUE STICKS & DUCK TAPE	59.00
P064914	AMAZON (ABPL)	1/6/2025 SHARPENER, GLUE, CUPS, ETC	311.88
P064915	CARYN KAUFMAN	1/6/2025 USPS - CERTIFIED MAIL POSTAGE	10.99
P064916	REVOLUTION OFFICE	1/6/2025 11/12/24-12/11/24 - COPIER LEASE	779.04
P064917	CAPISTRANO UNIFIED SCHOOL	1/6/2025 11/24 - HARVEST FAIRE SHUTLE FY24-25 - WORKERS COMPENSATION	662.50
P064918	MARSH & MCLENNAN AGENCY LLC	1/6/2025 PREMIUM (6 OF 10)	3,913.00
P064919	HELLENE BRODSKY	1/6/2025 MULTIPLE VENDORS - CRAFTING SUPPLIES	155.77
2651M	GREAT AMERICAN INSURANCE CO	1/8/2025 11/24-12/24 - INSURANCE PREMIUM	6,489.26
2652M	COLONIAL LIFE	1/8/2025 01/25 - INSURANCE PREMIUM	655.52
2653M	REI SHADE SYSTEMS	1/8/2025 12/24 - SHADE SAIL INSTALLATION FINAL	2,400.00
2654M	GUARDIAN	1/8/2025 01/25 - HEALTH PREMIUM	2,926.53
2655M	CONTRERAS CONSTRUCTION	1/8/2025 12/24 - HANDYMAN SERVICES	1,495.00
2656M	FIRST NATIONAL BANK OF OMAHA	1/8/2025 12/24 - CREDIT CARD PURCHASES	9,491.99
1006580	EXCELLENT EDUCATION DEVELOPMENT	1/13/2025 CALPADS, SIS SUPPORT & FEES	14,098.35
A021219	EARTHROOTS FIELD SCHOOL, INC.	1/13/2025 01/25 - ECO-LITERACY INSTRUCTION	2,391.67
A021220	OC DAVOC ENTERPRISES, INC.	1/13/2025 TISSUE, LINERS, SOAP, PAPER TOWELS, ETC. 11/26/24-12/25/24 - PHONE & HOTSPOT FOR	1,478.20
A021221	VERIZON WIRELESS	1/13/2025 FACULTY USE	179.60
A021222	KAISER PERMANENTE (3383)	1/13/2025 02/25 - HEALTH PREMIUM	27,845.33
A021223	YOUNG, MINNEY & CORR, LLP	1/13/2025 12/24 - LEGAL SERVICES	375.00
A021224	OC DAVOC ENTERPRISES, INC.	1/13/2025 12/24 - JANITORIAL SERVICE	6,884.89
E019078	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	1/13/2025 12/09/24-12/13/24 - NURSE	4,215.11
E019079	WESTERN EXTERMINATOR COMPANY	1/13/2025 12/24 - PEST CONTROL MAINTENANCE	334.48
E019080	MERCURIUS	1/13/2025 COLORED PENCILS & FOUNTAIN PENS	183.39
E019081	STAPLES	1/13/2025 COFFEE, CREAMER, BINDERS, ETC	99.00
E019082	MOBILE RELAY ASSOCIATES, LLC, DBA. RAYCOM	1/13/2025 01/01/25-12/31/25 - HANDHELD RADIOS	100.00
P065247	CAPISTRANO UNIFIED SCHOOL	1/13/2025 SERVICE FEE	582.05
2664M	CONTRERAS CONSTRUCTION	1/13/2025 10/21/24-11/18/24 - WATER USE 2/4/2025 01/25 - HANDYMAN SERVICES 01/25-02/25 - MENTORSHIP FOR MUSIC	1,266.00
2665M	LINDSAY FREDERIKSEN	2/4/2025 CLASSES	131.20
2666M	THE TEAHOUSE COMPANY	2/4/2025 02/25 - EVENT MUSICIANS FINAL	400.00
2667M	S & M IRRIGATION LLC	2/6/2025 02/25 - IRRIGATION REPAIRS DEPOSIT	500.00
2668M	S & M IRRIGATION LLC	2/6/2025 02/25 - IRRIGATION REPAIRS FINAL	430.00
2669M	FIRST NATIONAL BANK OF OMAHA	2/6/2025 01/25 - CREDIT CARD PURCHASES	2,575.74
2670M	GUARDIAN	2/7/2025 02/25 - HEALTH PREMIUM	2,896.03
1006587	CAPISTRANO UNIFIED SCHOOL	2/10/2025 01/25-02/25 - RENT & OVERSIGHT	42,138.34
1006588	STRATEGIC KIDS, LLC	2/10/2025 01/25 - INSTRUCTIONAL AIDES	33,957.50
A021795	OC DAVOC ENTERPRISES, INC.	2/11/2025 01/25 - JANITORIAL SERVICE MULTIPLE VENDORS - FOOD FOR CLASS	8,823.81
A021796	CATHRINE JI	2/11/2025 EVENTS	28.07
A021797	GOTO COMMUNICATIONS, INC	2/11/2025 02/25 - PHONES	922.16
A021798	OC DAVOC ENTERPRISES, INC.	2/11/2025 TISSUE, LINERS, SOAP, PAPER TOWELS, ETC	1,672.12
A021799	YOUNG, MINNEY & CORR, LLP	2/11/2025 01/25 - LEGAL SERVICES	474.00
A021800	EARTHROOTS FIELD SCHOOL, INC.	2/11/2025 02/25 - ECO-LITERACY INSTRUCTION	2,391.67
E019593	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	2/11/2025 01/21/25-01/24/25 - NURSE	2,959.17
E019594	STAPLES	2/11/2025 BABY WIPES, GLUE STICKS, BALLPENS	205.09
P066654	NICOLA WELLNER	2/11/2025 JOANN - FABRIC & WOOL	557.24
P066655	STRATEGIC KIDS, LLC	2/11/2025 01/25 - ELOP LEADS & INSTRUCTORS	4,522.00
P066656	CUSD - FOOD & NUTRITION SERVICES	2/11/2025 01/25 - STUDENT MEALS ADMIN FEE	1,500.00



**Journey School  
Check Register  
For the Month Ending February 28, 2025**

Check #	Vendor Name	Date Description	Amount
P066657	AMAZON (ABPL)	2/11/2025 (7) STOOLS SETS	913.45
P066658	JANET GATES	2/11/2025 CARMEN HOUSE KEEPING - CLEANING	300.00
P066659	SOUTHERN CALIFORNIA EDISON	2/11/2025 12/30/24-01/28/25 - ELECTRIC	5,508.67
P066660	FIONA KEPHART	2/11/2025 INSTACART - ROLLED OATS & GRAIN MILLET	21.07
P066661	CAPISTRANO UNIFIED SCHOOL	2/11/2025 CURRICULUM PRINTING	74.39
2671M	CR&R INCORPORATED	2/13/2025 02/25 - WASTE & RECYCLING SERVICES	702.52
2672M	VOID	2/13/2025 VOID	0.00
2673M	WELLS FARGO 9313	2/13/2025 01/25 - CREDIT CARD PURCHASES	1,509.63
2674M		2/19/2025 02/25 - PAYROLL	2,076.27
2675M		2/19/2025 02/25 - PAYROLL	671.02
A021960	JAIME LLOYD	2/19/2025 GIRL GANG GOODS - BREAD 12/26/24-01/25/25 - PHONE & HOTSPOT FOR	42.00
A021961	VERIZON WIRELESS	2/19/2025 FACULTY USE	86.08
E019725	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	2/19/2025 01/27/25-01/31/25 - NURSE	4,153.57
P067030	CAPISTRANO UNIFIED SCHOOL	2/19/2025 12/24 - FIELD TRIP TRANSPORTATION	426.25
P067031	AMAZON (ABPL)	2/19/2025 INDEX CARDS, BUCKWHEAT HULLS	311.08
P067032	SWING EDUCATION, INC	2/19/2025 02/01/25-02/07/25 - SUBSTITUTE TEACHERS	266.40
P067033	ERIN WARRACK	2/19/2025 TRADER JOE'S - STUDENT SNACKS	22.93
P067034	ORANGE COUNTY DEPT OF	2/19/2025 10/24-12/24 - PAYROLL/RETIREMENT	1,801.44
2678M	CONTRERAS CONSTRUCTION	2/21/2025 01/25 - HANDYMAN SERVICES	1,314.00
2679M	COLONIAL LIFE	2/21/2025 03/25 - INSURANCE PREMIUM	720.08
1006589	DARREN UTTERBACK	2/24/2025 REIM062024DU	38.73
1006590	EXCELLENT EDUCATION	01/25 - MANAGEMENT CONTRACT FEE,	
1006591	DEVELOPMENT	2/24/2025 CALPADS, SIS SUPPORT & FEES	15,059.09
1006591	GAVIN KELLER	2/24/2025 HOME DEPOT - BOXES & TAPE	141.00
E019829	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	2/24/2025 02/03/25-02/07/25 - NURSE	3,711.56
E019830	ALPINE FRESH USA	2/24/2025 02/25 - BOTTLED WATER SERVICE 03/22/25-06/21/25 - POSTAGE METER LEASE,	664.25
E019831	QUADIANT LEASING USA, INC.	2/24/2025 TAX & LF	297.54
E019832	STAPLES	2/24/2025 POST-ITS, MARKERS & STAPLES	94.30
E019833	WESTERN EXTERMINATOR COMPANY	2/24/2025 02/25 - PEST CONTROL MAINTENANCE	345.04
E019834	BRIGHTSTAR CARE OF SOUTH ORANGE COUNTY	2/24/2025 02/10/25-02/13/25 - NURSE 02/08/25-03/07/25 - INTERNET & CA	2,793.84
E019835	COX COMMUNICATIONS	2/24/2025 TELECONNECT FUND	231.75
P067289	RITA KANDEL	2/24/2025 UPS - POSTAGE STAMPS	38.00
P067290	REVOLUTION OFFICE	2/24/2025 01/12/25-02/11/25 - COPIER LEASE MULTIPLE VENDORS - CCSA CONFERENCE	630.34
P067291	MARGARET MOODIAN	2/24/2025 LODGING & AIRFARE WHEAT FLOUR, GRAIN MILLET, ORGANIC	939.01
P067292	AMAZON (ABPL)	2/24/2025 OATS, ETC	542.15
2677M	SEGERSTROM CENTER FOR THE ARTS	2/25/2025 05/25 - THEATER PERFORMANCE TICKETS	702.00
2680M	SEGERSTROM CENTER FOR THE ARTS	2/25/2025 04/25 - THEATER PERFORMANCE TICKETS	2,250.00
2676M	THE MEMORY PROJECT	2/28/2025 01/25 - ART PROJECT PARTICIPATION FEE	435.00
<b>Total</b>			<b>250,158.97</b>

## Journey School School Calendar: 2025-26

Attendance Month	Week #	Calendar Month	M	T	W	TH	F	Staff Days	Student Days	Min. Days		
											<b>Draft 3.12.25</b>	
	1	Aug	25	26	27	28	29	5	0	0	pre-service/pupil-free days 8/25-8/29 and 9/2	Minimum Day grades 1-8
	2	Sept	1	2	3	4	5	4	3	1	First day of school 9/3 & short day kinder	Labor Day 9/1
	3		8	9	10	11	12	5	5	1		
	4		15	16	17	18	19	5	5	1	Back to School Nights 9/17 and 9/24	
Month 1	18		22	23	24	25	26	5	5	1	Attendance months	
	6	Oct	29	30	1	2	3	5	5	1		
	7		6	7	8	9	10	5	5	1		
	8		13	14	15	16	17	5	5	1		
Month 2	20		20	21	22	23	24	5	5	1		
	10		27	28	29	30	31	5	5	1		
	11	Nov	3	4	5	6	7	5	4	4	Inservice/pupil-free day 11/3	Minimum days - conference week
	12		10	11	12	13	14	4	4	1	Veterans' Day 11/11	
Month 3	18		17	18	19	20	21	5	5	1		
	14		24	25	26	27	28	0	0	0	Fall Break	
	15	Dec	1	2	3	4	5	5	5	1		
	16		8	9	10	11	12	5	5	1	End of P1/M4 is 12/19	
Month 4	14		15	16	17	18	19	4	4	2	Winter Break	
	18		22	23	24	25	26	0	0	0	Winter Break	
	19	Jan	29	30	31	1	2	0	0	0	Winter Break	
	20		5	6	7	8	9	5	5	1		
	21		12	13	14	15	16	5	5	1		
	22		19	20	21	22	23	4	4	1	Martin L King Day 1/19	Progress Reports Due January 23
Month 5	19		26	27	28	29	30	5	5	1		
	24	Feb	2	3	4	5	6	5	5	1		
	25		9	10	11	12	13	4	4	1	Presidents' Day 2/14 and 2/17	
	26		16	17	18	19	20	4	4	4	Minimum days - conference week	
Month 6	18		23	24	25	26	27	5	5	1		
	28	March	2	3	4	5	6	5	5	1		
	29		9	10	11	12	13	5	5	1		
	30		16	17	18	19	20	5	5	1		
Month 7	20		23	24	25	26	27	5	5	1	End of P2/M7 is 3/29	
	32	April	30	31	1	2	3	5	5	1		
	33		6	7	8	9	10	0	0	0	Spring Break	
	34		13	14	15	16	17	5	5	1		
	35		20	21	22	23	24	5	5	1		
Month 8	19	May	27	28	29	30	1	5	4	1	Inservice/pupil-free day 4/27	
	37		4	5	6	7	8	5	5	1		
	38		11	12	13	14	15	5	5	1		CAASP testing window TBD in May
	39		18	19	20	21	22	5	5	1		
Month 9	19		25	26	27	28	29	4	4	1	Memorial Day 5/25	
	41	June	1	2	3	4	5	5	5	1		
Month 10	10		8	9	10	11	12	5	5	2	Last day of school 6/12 min day & short day kinder	
	43		15	16	17	18	19	3	0	0	Inservice/Pupil-Free (2 days Report Cards)	End Year Progress Reports Due June 18
	44		22	23	24	25	26	5	0	0	Teachers work a total of 5 days for summer training, with admin approval of days	
	45	July	29	30	1	2	3	0	0	0	July 4th Holiday - Office CLOSED	June 19th - Juneteenth Holiday
	46		6	7	8	9	10	5	0	0		
	47		13	14	15	16	17	5	0	0		
	48		20	21	22	23	24	5	0	0		
	49		27	28	29	30	31	5	0	0		
	50	Aug	3	4	5	6	7	5	0	0		
	51		10	11	12	13	14	5	0	0		
	52		17	18	19	20	21	5	0	0		
<b>Total Teacher Days</b>								<b>191</b>				
<b>Total Student Days</b>								<b>175</b>				
<b>Total Minimum Days</b>								<b>45</b>				

# JOURNEY SCHOOL

2025-2026

## Instructional minutes calculation:

Kindergarten REG	130	days	@
Kindergarten 1st/Last Day of School	2	days	@
Kindergarten MIN	45	days	@
Grades 1-3 REG	130	days	@
Grades 1-3 MIN	45	days	@
Grades 4-8 REG	130	days	@
Grades 4-8 MIN	45	days	@

## Bell Schedule:

**NOTE: STAGGER**

Kindergarten regular days	9:00	AM
Kindergarten 1st/Last Day of School	9:00	AM
Kindergarten min days	9:00	AM
Grades 1-3, all days, morning lesson	8:40	AM
Grades 1-3, all days guided snack and period 1	10:25	AM
Grades 1-3, minimum days, guided lunch, period 2, closing	11:45	PM
Grades 1-3, regular days, guided lunch, period 2-4, closing	12:05	PM
Grades 4-8, all days, morning lesson	8:40	AM
Grades 4-8, regular days, period 1 and period 2	10:55	AM
Grades 4-8, minimum days, period 1 and period 2 & closing	11:00	AM
Grades 4-8, regular days, period 3, 4, & closing	1:20	PM

## Total Minutes

Kindergarten regular day total	225
Kindergarten 1st/Last Day of School	120
Kindergarten minimum day	195
Grade 1-3 regular day total	325
Grade 1-3 minimum day	220
Grade 4-8 regular day total	325



draft 3.12.25

	JOURNEY	TOTALS	Regular Requirement	Grade level
225	29,250	<b>38,265</b>	36,000	K
120	240			
195	8775			
325	42250			
220	9900	52,150	50,400	1 to 3
325	42,250			
230	10,350	<b>52,600</b>	54,000	4 to 8

**ED BELL SCHEDULE FOR START/END TIMES**

Total

to	12:45	PM	225
to	11:00	AM	120
to	12:15	PM	195
to	10:00	AM	80
to	11:30	AM	65
to	1:00	PM	75
to	3:05	PM	180
to	10:20	AM	110
to	12:45	AM	110
to	1:00	PM	120
to	3:05	PM	105



## CHARTER PERFORMANCE CATEGORY – JOURNEY SCHOOL

The 2024 data was released by California Department of Education on March 14, 2025. The Charter School Performance Category Data File is updated annually with the release of the Dashboard when new performance levels (colors) are assigned. Due to Assembly Bill 130 (Chapter 41, Statutes of 2021), performance colors were not reported on the Dashboard in 2020 or 2021. In 2022, reporting on the Dashboard used one-year of data to report Status to determine student performance. The 2023 Dashboard reflects a full return of California's accountability system with the reporting of Status (also known as current year data), Change (the difference between the current year data and the prior year data), and performance levels (colors) for all state indicators except for the College/Career Indicator (CCI). The CCI indicator does not apply to Journey School.

<https://www.cde.ca.gov/sp/ch/performcategory.asp>

YEAR	SCHOOL	PERFORMANCE LEVEL	CRITERIA
2024	Journey	High Performing	Criterion 2
2023	Journey	High Performing	Criterion 2

Performance level determinations under Criterion 2 are based on the **overall Status** for both the charter school and its student groups, and how they compare with the statewide averages for the two previous Dashboard years.

Performance determination levels are used for High Performing charter schools are used by authorizing agencies for charter renewals. A charter school in the high performing category is a presumptive renewal and eligible for a five-, six-, or seven-year renewal term.



# Determining Charter School Performance Category

March 2025

Pursuant to California *Education Code (EC)* Section 47607(c), as an additional criterion for determining whether to grant a charter renewal, the chartering authority shall consider a charter school's placement under performance categories based on the charter school's performance on the California School Dashboard (Dashboard).

The following two criteria are used to determine the performance category (i.e., High, Middle, or Low) of a charter school:

- 1. Criterion 1:** Based on the performance colors received for **all** of the state indicators on the Dashboard for the two previous Dashboard years. The Dashboard state indicators are:
  - English language arts/literacy (ELA),
  - Mathematics,
  - Chronic Absenteeism Indicator,
  - English Learner Progress Indicator (ELPI),
  - Graduation Rate Indicator,
  - College/Career Indicator (CCI), and
  - Suspension Rate Indicator.
- 2. Criterion 2:** Based on the "Status" (also known as current year data) for all academic indicators with a performance color for the two previous Dashboard years. Note that per California *EC* Section 47607(c)(3), academic indicators are defined as:
  - ELA,
  - Mathematics,
  - ELPI, and
  - CCI.

Details on each of the criteria appear below. Schools that meet neither the High nor Low performing levels under Criterion 1 or 2 above are automatically placed in the Middle performance category.



# Determining the Performance Category

As noted earlier, data for the two previous Dashboard years are used to make performance category determinations. Therefore, for this current release, the 2023 and 2024 Dashboards are used.

The 2023 Dashboard performance for the CCI indicator was reported using one of five Status levels due to modifications made in state law to the accountability system during the COVID 19 pandemic. Therefore, as expressed in the bullets below, Status levels were used as a proxy for performance colors on the 2023 Dashboard where there were at least 30 students.

- Status Level Very Low = Red
- Status Level Low = Orange
- Status Level Medium= Yellow
- Status Level High = Green
- Status Level Very High = Blue

Charter schools that received a 2024 Dashboard but closed during the 2024-25 school year have been removed from consideration of receiving performance categories. Schools that had a charter status in 2023-24 but changed its status to non-charter during the 2024-25 school year were also removed from consideration of receiving performance categories.

## Criterion 1 (Performance Colors)

The following conditions apply for charter school renewal under Criterion 1:

- Must have at least two academic indicators (i.e., ELA, Mathematics, CCI, and/or ELPI) at the school level in each of the two Dashboard years. (The two academic indicators do not need to be the same indicators each year.)

Charter schools that meet the following conditions are determined to be High or Low performing, based on the color assignments at the school level:

- **High Performing:** The school has Blue and/or Green on **all** state indicators for two years: Eligible for presumptive renewal.
- **Low Performing:** The school has Red and/or Orange on **all** state indicators for two years: Eligible for presumptive non-renewal.

Charter schools that do not meet Criterion 1 requirements for presumptive renewal or non-renewal are subject to Criterion 2.

# Criterion 2 (Status)

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The following conditions apply for charter school renewal under Criterion 2:

1. Limited to academic indicators (i.e., ELA, Mathematics, CCI, and ELPI).
2. Limited to only those academic indicators with a color (Note: Status levels were used as a proxy for performance colors on the 2023 Dashboard CCI).

Performance determinations under Criterion 2 are based on the **overall Status** for both the charter school and its student groups, and how they compare with the statewide averages for the two previous Dashboard years. The state's Status is used as the "statewide average" for the academic indicators.

## Determinations for Presumptive Renewal/High Performing

1. For **schools** that have a performance color for all academic indicators, the school received an overall Status that is the same or higher than the overall Status for the State of California.
2. For each academic indicator, remove the **student groups** that performed higher than or at the same level as the statewide average.
  - a. For the 2024 Charter School Performance Category Data File, the student groups that performed higher or at the same level were: White, Asian, Filipino, Two or More Races. (Note: The ELPI did not have student groups for the 2023 Dashboard; however, the school must have a higher Status than that of the statewide average.)
3. For each academic indicator, after removing the student groups in step 2 above, identify the student groups with a color that scored higher than their respective student group statewide average (i.e., received a higher Status score on the indicator).
4. Each school must have **at least two** remaining student groups that receive a color. (Note that the total number of student groups can be across the two previous Dashboard years.)
5. The student groups must have **at least two** academic indicators in each of the two Dashboard years. (The two academic indicators do not need to be the same indicator each year.)
6. **To be placed in the High Performing Category**, for each academic indicator for each year, the school must have a majority of student groups scoring higher than

the statewide average for their respective student group. *(Note: If the school does not have two remaining student groups, the school is placed in the Middle performance category.)*

## Determinations for Presumptive Non-Renewal/Low Performing

1. For **schools** that have a performance color for all academic indicators, the school received an overall Status that is the same or lower than the overall state average.
2. For each academic indicator, remove the **student groups** that performed higher than or at the same level as the statewide average.
  - a. For the 2024 Charter School Performance Category Data File, the student groups that performed higher or at the same level were: White, Asian, Filipino, Two or More Races. *(Note: The ELPI did not have student groups for the 2023 Dashboard; however, the school must have a higher Status than that of the statewide average.)*
3. For each academic indicator, after removing the student groups in step 2 above, identify the student groups that scored lower than their respective student group statewide average (i.e., received a lower Status score on the indicator).
4. Each school must have **at least two** remaining student groups that receive a color. (Note that the total number of student groups can be across the two previous Dashboard years.)
5. The student groups must have at least two academic indicators in each of the two Dashboard years. (The two academic indicators do not need to be the same indicator each year.)
6. To be placed in the **Low Performing Category**, for each academic indicator for each year, the school must have a majority of student groups scoring lower than the statewide average for their respective student group. *(Note: If the school does not have two remaining student groups, the school is placed in the Middle performance category.)*

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## Middle Performance

Charter schools that meet neither the High nor Low performing categories under Criterion 1 or 2 are automatically placed in the Middle performance category.

## **Exclusion of Schools with Dashboard Alternative Schools Status (DASS)**

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DASS charter schools have their own renewal criteria. Therefore, the High, Middle, or Low performance categories are not determined for these schools. As a result, they are not included in the 2024 Charter School Performance Category Data File.

For more information on the renewal criteria for DASS schools, refer to the CDE [Dashboard Alternative School Status](#) web page.

To determine which charter schools are DASS, download the Current DASS Schools data file posted on the CDE [Active DASS Schools](#) web page.

## **Resources**

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For more information regarding performance categories, please refer to the California Department of Education [Performance Categories](#) web page.

All files and data needed to create the performance categories list can be found in the Dashboard downloadable data files posted on the CDE [Dashboard Resources](#) web page.

The statute on charter school renewals can be found on the [California Legislative Information](#) web page.

# UNDERSTANDING THE CALIFORNIA GROWTH MODEL

A Simple Guide for Educators, Parents,  
and Community Members





**Measures student improvement in ELA & Math**



**Focuses on growth over time, not just scores**



**Helps schools track student progress**

**WHAT IS  
THE  
GROWTH  
MODEL?**



**Shows student progress  
beyond a single test**

**Helps schools & districts  
identify strengths**

**Ensures all students are  
making gains**

**WHY DOES  
GROWTH  
MATTER?**

A series of white lines of varying lengths and orientations, including a prominent diagonal line, are located in the bottom right corner of the slide.

# WHO IS INCLUDED?

Students in grades 4-8  
(have previous scores)



Growth is measured for  
schools, districts, groups



Individual scores aren't  
tracked for students





# HOW IS GROWTH MEASURED?

- ▶ Compares actual vs. expected scores
- ▶ Growth Score =  
Actual Score - Expected Score
- ▶ Schools/districts get an average growth score




# SIMPLE VS. WEIGHTED AVERAGE

**Simple Average**  
(LEA-level groups  
w/ 500+ students):  
All scores evenly  
averaged

**Weighted Average**  
(<500 students):  
Scores adjusted for  
fairness

# DETERMINING GROWTH CATEGORY

- ▶ State Typical Growth is set at zero
  - ▶ Above
    - ▶ Growth Score Margin of Error is completely above zero
  - ▶ Typical
    - ▶ Growth Score Margin of Error crosses or touches zero
  - ▶ Below
    - ▶ Growth Score Margin of Error is completely below zero
- 
- A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.


# WHAT THIS MEANS FOR SCHOOLS

- ▶ Helps schools understand student progress
- ▶ Guides instructional adjustments
- ▶ Identifies gaps & improves teaching strategies

# WHAT THIS MEANS FOR PARENTS

- ▶ Look at Student Score Reports for performance
- ▶ Growth scores not reported for individuals
- ▶ Ask teachers for progress support at home

# WHEN WILL GROWTH DATA BE AVAILABLE?

- ▶ **First official release: February 2025**
    - ▶ **Uses data from 2021-22, 2022-23, 2023-24**
  
  - ▶ **Subsequent releases will be separated from the Dashboard Release**
- 

# KEY TAKEAWAYS

- ▶ Tracks student progress over time
  - ▶ Helps schools & districts improve learning
  - ▶ First growth scores available in February 2025
- 

# WHERE DO WE FIND THE GROWTH DATA?

<https://www.caschooldashboard.org/>



A screenshot of the California School Dashboard homepage. The left sidebar contains a navigation menu with categories: Academic Performance, Academic Engagement, Conditions and Climate, and Informational Purposes. Under Informational Purposes, "English Language Arts Growth" and "Mathematics Growth" are listed, with "English Language Arts Growth" circled in red. The main content area is titled "English Language Arts" and shows "All Students" data, including a score of 48.6 points above standard and 14 total student groups.

- On the left side, at the bottom of the list, you will see ELA Growth and Mathematics Growth
- Click on that and your growth report will show up

A screenshot of the "English Language Arts Growth" report page. It features two main charts: "Growth Score All Students" showing a score of 9 points above the typical growth, and "Growth Category All Students" showing the category as "Above". The page also includes a "Growth Model" link and a "Explore Groups By Growth" section at the bottom with filters for Below (1), Typical (5), Above (8), and No Growth Determination (0).

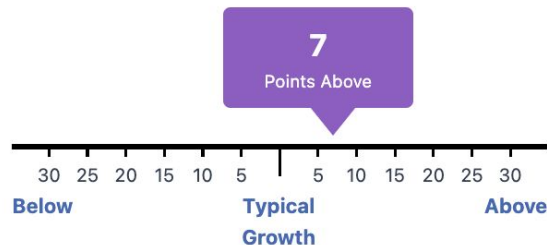


# WHAT DOES JOURNEY SCHOOL'S GROWTH DATA LOOK LIKE IN ENGLISH LANGUAGE ARTS?

## English Language Arts Growth

Growth data measures the year-to-year improvement in students' assessment scores in English Language Arts (ELA) and mathematics. These aggregate student growth scores can provide a picture of average growth for students within a school, local educational agency, or student groups within the Accountability system. The information presented on the Dashboard is for informational purposes only. For more details and frequently asked questions about growth, please visit the [Growth Model website](#).

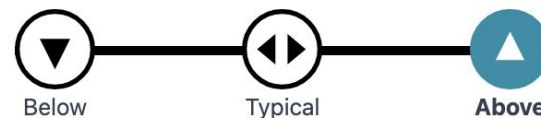
### Growth Score All Students



Students in the All Students group generally scored **7 points above** the typical growth of students with similar test scores in the previous grade level.

Number of Students: 247

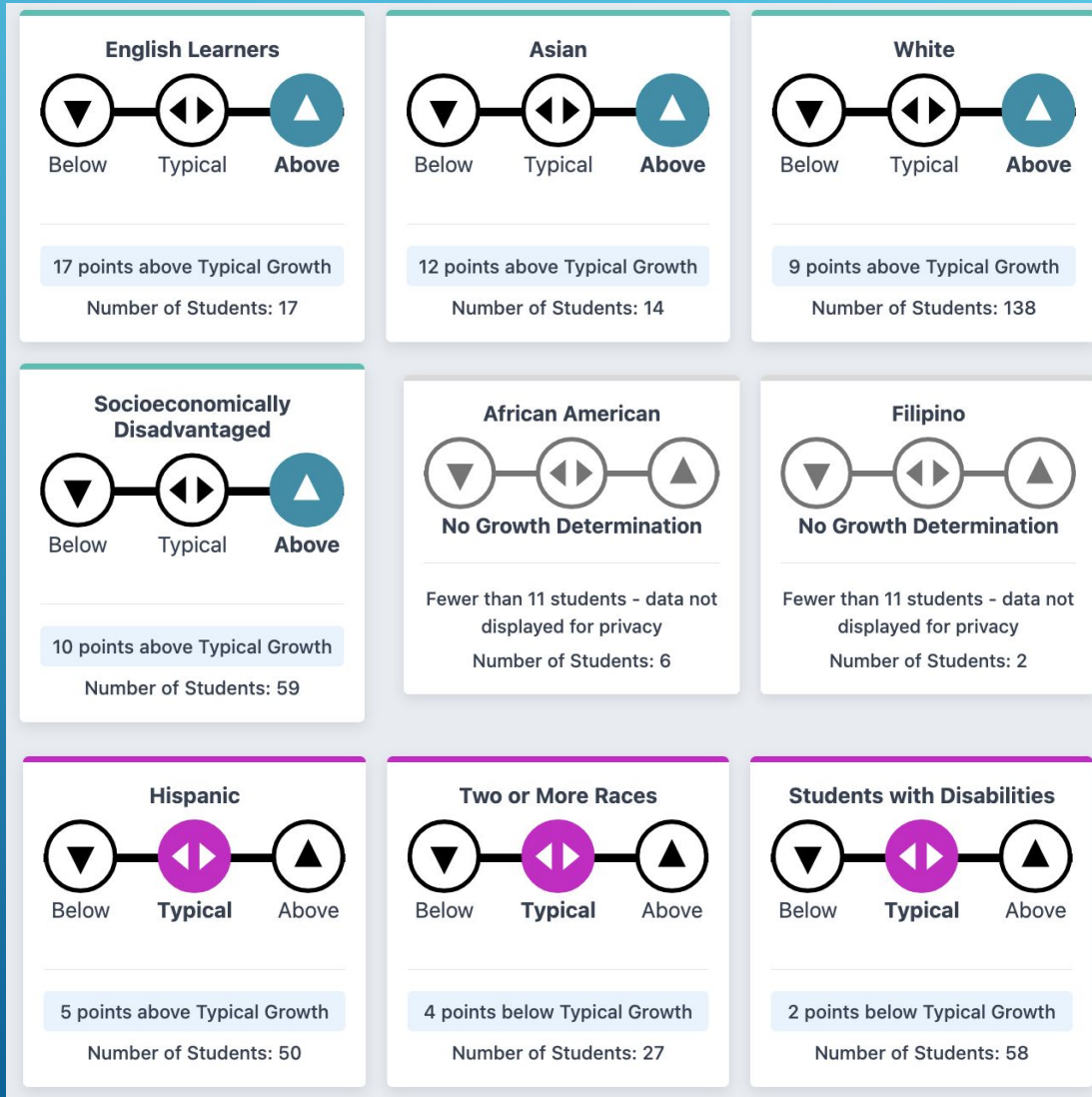
### Growth Category All Students



The growth scores of students in the All Students group were on average **above** the typical growth of students with the same scores in the previous grade level.

[Understanding the Growth Category](#)

# WHAT DOES JOURNEY SCHOOL'S GROWTH DATA LOOK LIKE FOR VARIOUS STUDENT GROUPS IN ENGLISH LANGUAGE ARTS?

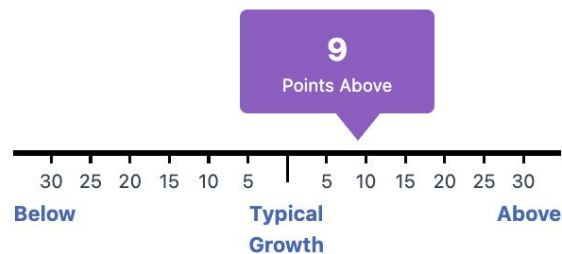


# WHAT DOES JOURNEY SCHOOL'S GROWTH DATA LOOK LIKE IN MATHEMATICS?

## Mathematics Growth

Growth data measures the year-to-year improvement in students' assessment scores in English Language Arts (ELA) and mathematics. These aggregate student growth scores can provide a picture of average growth for students within a school, local educational agency, or student groups within the Accountability system. The information presented on the Dashboard is for informational purposes only. For more details and frequently asked questions about growth, please visit the [Growth Model website](#).

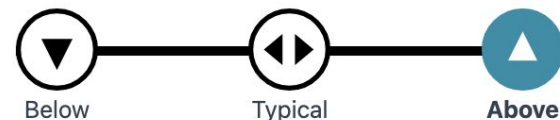
### Growth Score All Students



Students in the All Students group generally scored **9 points above** the typical growth of students with similar test scores in the previous grade level.

Number of Students: 247

### Growth Category All Students



The growth scores of students in the All Students group were on average **above** the typical growth of students with the same scores in the previous grade level.

[Understanding the Growth Category](#)

# WHAT DOES JOURNEY SCHOOL'S GROWTH DATA LOOK LIKE FOR VARIOUS STUDENT GROUPS IN MATHEMATICS?

